



## June 2020 Survey of Agriculture and Horticulture: Results for Wales

17 December 2020  
SFR 233/2020

The June Agricultural and Horticultural Survey has been carried out since 1867 to provide estimates of agricultural activity in Wales on an annual basis. The 2020 survey was undertaken during the coronavirus (COVID-19) pandemic and this has impacted on the results (see [Changes in 2020](#)).

This Bulletin provide the first estimates of the key variables from the survey.

### Key results



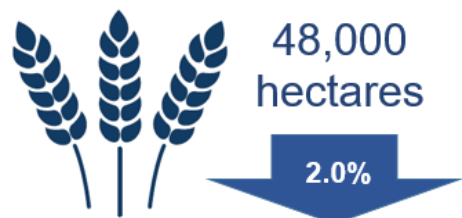
90% of the land area of Wales is given over to farming. The nature of this land means that it is mostly used for rearing sheep and cattle.



The fall in the number of sheep and lambs was mainly seen in the breeding ewes. The number of lambs also fell but to a lesser extent.



Whilst the total number of cattle and calves and the size of the dairy herd remained largely unchanged, the size of the beef herd continues to fall.



The area of cereals grown in Wales accounts less than 3% of the total agricultural area.

### About this release

This release presents estimates for land use, livestock and labour on Welsh farms in 2020. More detailed analyses can be found in some of the other outputs listed in the Further Information section of this Release.

The headline estimates in this release are compared with the equivalent estimates from 2019.

Further information of how the estimates fit into the longer historical context can be found at the foot of the Changes for 2020 section.

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## Important changes for the 2020 Survey

This year's survey has been significantly impacted by uncertainties caused by the ongoing COVID-19 pandemic. The initial outbreak and subsequent national lockdown beginning in March coincided with the planning phase for the survey. This required an assessment of what was appropriate and achievable.

The outcome was that the following changes were made to the survey in 2020:

- A less detailed question set was used for the survey. This captured the key variables required to make comparisons with previous years. As a result, the length of the form was reduced from 8 pages to 2 pages, easing the burden on the farmer;
- The survey was postponed from June until the end of August. However we asked that farmers complete the survey to reflect the position as it was on 1 June.
- An online option was introduced whereby farmers could complete the survey using their RPW Online account rather than filling out a paper form.

These changes were discussed with the 2 main farming unions in Wales and were agreed to be a sensible approach in the circumstances.

These changes have resulted in a significant increase in the response rate for the survey. A declining response rate has been a feature of this survey for a number of years. However, the response rate for the 2020 survey was 47%, over 10 percentage points higher than for the 2019 survey.

The take-up of the online option was also very encouraging. Experience elsewhere has shown that this take-up can initially be very low for online surveys. In this case we received 20% of all returns via this method.

As ever the Welsh Government would like to thank all farmers who took the time to complete the survey.

The drawback of the smaller set of variables and the later running of the survey is that it restricts the range of estimates that can be produced from the survey. Therefore there is a spreadsheet accompanying this release that contains:

- 2020 key variables: estimates for the key variables that were collected this year.
- Full variable list to 2019: a time series (1998-2019) showing how the key variables split into more detailed sub-categories.
- Historical context: a time series dating back to 1867 showing the trends in key indicators in the long-term.

This is made available on the [Statistics and Research website](#) along with this release.

The historical context is often the most important perspective on today's numbers. The [2019 Survey Results release](#) presents the key time series for land use and main livestock groups over the period 1867-2019. It also contains some commentary highlighting the main contributory factors underlying these trends.

The remainder of this release contains the key estimates from this year's survey.

## Section 1: Agricultural land use in Wales

The landscape, soil quality and climate of Wales limit the use to which its land can be put. Most of Wales is hilly or mountainous and this, combined with relatively poor soil quality and a wet climate, means that the majority of the land is restricted to the grazing of sheep and cattle.

The Welsh Agricultural Survey collects information about land that is used on farms (either owned or rented). The information excludes the use of common land which amounts to some 180,000 hectares in Wales. Common land is excluded because it is used by groups of farms with rights on a particular common, rather than being used exclusively by one farm.

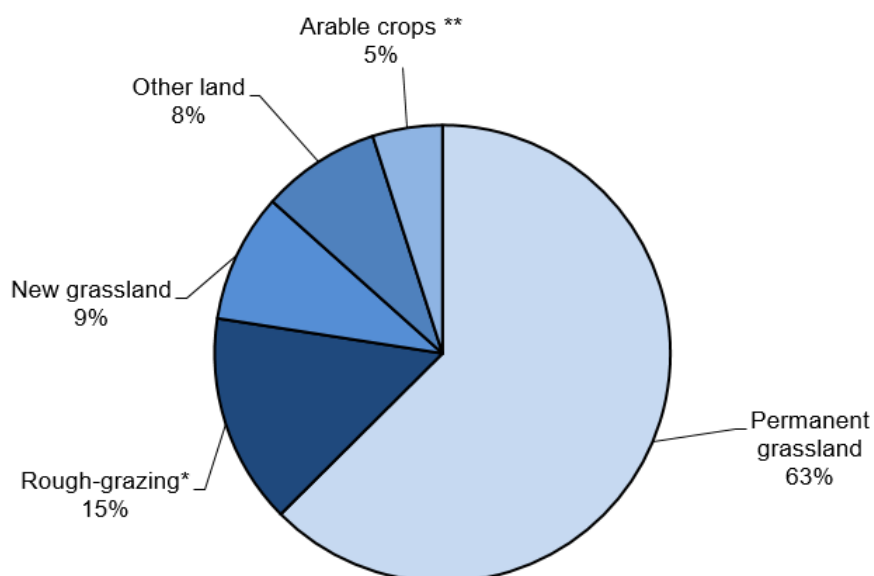
### Latest data

The estimates for the 2020 survey for agricultural land use show the following headline figures:

- The total amount of land on holdings fell by 3.8% to 1,697,000 hectares in June 2020. When combined with the 180,300 hectares of common rough grazing, this means that land used for agricultural purposes accounts for 90% of the total land area of Wales.
- The total area of arable crops fell by 9.0% to 82,700 hectares in June 2019. This area is significantly lower than has been in recent years although it should be noted that this figure does not include bare fallow which in 2020 was collected under the “other land” category.

The use of land on holdings in Wales in 2020 is illustrated below:

**Chart 1: Split of land on agricultural holdings by usage 2020**



\*Rough grazing where holder has sole rights (ie excludes common rough grazing)

\*\* Includes horticulture (vegetables and fruit grown in the open, hardy nursery stock and glasshouse)

## Section 2: Sheep and lambs in Wales

The hardiness of sheep means that they can be farmed in almost all areas of Wales. Sheep are more prevalent in the uplands of Wales where they may be the only feasible business option. While sheep tend to have relatively low maintenance and capital costs, they also show relatively low returns to the farmer. Thus on better land other activities may take precedence.

### Latest data

The estimates for the 2020 survey for sheep and lambs show the following headline figures:

- The total number of sheep and lambs in Wales was 8.99 million – down 5.7% on the previous year's figure. This was mainly as a result of a drop of 8.4% in the number of sheep aged 1 year or above. This total now stands at 4.48 million. The vast majority (over 95%) of these will be breeding ewes;
- There was a smaller fall (2.8%) in the number of lambs under 1 year old. The estimated number at June 2020 was 4.51 million.

The number of sheep and lambs in Wales began to grow during the 1970s, reaching a peak of 11.8 million in 1999. There was a gradual drop in numbers over the following 10 years, possibly reflecting changes to the operation of the EU Common Agricultural Policy (CAP) when schemes based on the number of livestock kept were phased out.

The historical statistics can be found in the spreadsheet that accompanies this release. A more detailed commentary on the trends can be found in the [2019 version of this release](#).

## Section 3: Cattle and calves in Wales

Cattle are mainly kept for either milk or meat production. These are the dairy and beef sectors. Farms tend to concentrate on either dairy or beef. Farms with both are rare, but not unknown. Dairy farming tends to have higher returns but requires better land and significant capital investment. In Wales farms that have significant numbers of beef cattle often also have significant numbers of sheep. Beef farms may raise the animals from calves all the way to slaughter. However, it is quite common in Wales, particularly in the uplands, to only raise the animals to a certain point and then moved to another farm where they will continue to be raised before being sent for slaughter. These farms may be in the Welsh lowlands or in England.

### Latest data

The estimates for the 2020 survey for cattle show the following headline figures:

- The total number of cattle and calves in Wales was 1,122,400 – this represents an increase of 0.2% from the figure for June 2019.
- The number of dairy females aged 2+ years that had calved has risen by 0.3% to a figure of 252,200. This definition is generally accepted as a measure of the dairy herd.
- Using the equivalent definition, the size of the beef herd decreased by 1.1% over the last 12 months to a figure of 162,000.

Since 2004, cattle numbers have been available from the Cattle Tracing System (CTS) which is managed by the British Cattle Movement Service (BCMS), primarily for animal health purposes.

Over this period there is a contrast between the trends seen in the numbers of dairy and beef cattle. Whilst the dairy herd has increased slightly (3%), the size of the beef herd period has fallen considerably (23%).

The historical statistics can be found in the spreadsheet that accompanies this release. A more detailed commentary on the trends can be found in the [2019 version of this release](#).

## **Section 4: Other livestock in Wales**

Economically, the bulk of livestock production from commercial farms in Wales comes from cattle and sheep. The main types other livestock groups are poultry and pigs but in each of these, production is concentrated in relatively few large units. The numbers kept by other, non-commercial keepers will be relatively small.

With this structure, a large increase or decrease in numbers on a handful of units can have a significant effect on the overall estimates. This is something that was seen in 2020.

### **Latest data: Pigs**

The estimates for the 2020 survey show the following headline figure:

- There was a 16% increase in the number of pigs in Wales in June 2020. The current total is 28,400. The majority (90%) of these animals are kept for fattening (meat production) with the remainder used for breeding.

This increase was due to a very small number of holdings now reporting a large number of pigs in 2020.

### **Latest data: Poultry**

The estimates for the 2020 survey show the following headline figure:

- The total poultry in Wales was 9,840,200 in June 2020 – the majority of these were table chicken or broilers (6.6 million) and chicken kept for eggs (3.0 million birds). Note that the 2020 figures include breeding fowls used to rear broilers and pullets and so are not comparable with numbers from earlier years.

Historical series for the numbers of pigs and poultry can be found in the spreadsheet that accompanies this release. A more detailed commentary on the trends can be found in the [2019 version of this release](#).

### **Horses and goats**

Data on these livestock groups are not presented as part of this release although they are available in the accompanying spreadsheet. The reason for this is that, in an agricultural context for Wales as a whole, they are of less interest than other livestock groups.

As a result of mechanisation, the use of horses for agricultural purposes is almost a redundant concept in the 21st century. A tiny fraction may still be used in this way but these will be on tourism/museum sites rather than on real modern-day working farms. Most are found at liveries, riding schools or kept in paddocks or

stables as pets for recreational purposes. Some farms will gain an additional income by providing riding, stabling and livery services.

Whilst there are some goat herds in Wales, the majority of these will be relatively small and will not form the basis for a commercial undertaking. Typically they would be used for grazing to maintain the land and, in some cases, a small amount of milk production. There are a handful of more commercial dairy producers but it isn't possible to focus on these without risking disclosure of individual farm operations.

## **Section 5: Labour on agricultural holdings in Wales**

The estimates for farm labour presented in this release are restricted to the numbers of principal farmers and those people employed to work on the farm. Please see the comments on data quality below for further information about why further details are not presented. The 2020 estimates show that:

- The number of principal farmers, directors, business partners and their spouses was 37,300, a fall of 6% from 2019.
- This number comprises 18,700 full-time principal farmers and 18,600 part-time. Although there was a small increase (3.5%) in the number of full-time farmers, there was a large fall in the number of part-time farmers. This figure fell by 14% or 3,000 people. It is likely that this is at least partly attributable to under-reporting. This may have been as a result of a change in working practices during the COVID-19 movement restrictions.
- The number of people employed on farms at 1 June 2020 was 15,500. This represents an increase of almost 18% and is attributable to a much higher number of casual workers recorded on the farms. Unlike regular workers (who would work on the farm throughout the year), casual workers are taken on for shorter periods when extra work needs to be carried out on the farm. The exceptional circumstances of this year may have brought about a change in working practices that caused this increase though it is too early to gauge this.

The definition of principal farmers is quite broad: it includes business partners, company directors and any spouses of the farmer or their business associates. However any spouse must undertake some work on the farm in order to be included.

In Wales, the majority of the day-to-day work on the farm is carried out by the farmer and their immediate family. Most of the time, these will be included in the definition of principal farmers outlined above. In most cases any additional help needed will be for short periods at busy times of the year (eg lambing, harvesting) or to carry out specialist tasks (eg shearing, dipping).

The specialist work will tend to be carried out by contractors who are not included in the Agricultural Survey labour count. The main reasons for this are that they are self-employed and are often farmers themselves (as thus already included in the survey estimate).

The survey is carried out as a snapshot on a single day at the beginning of June. The associated volatility thus makes it very difficult to establish any trend over a series of years. Factors such as the weather can often determine when people are engaged during the year for example.

We appreciate that the definitions of who is to be included and how they should be categorised can present some difficulty. For this reason we have revised the way that the labour questions are presented

on two occasions over the past 10 years. However it needs to be borne in mind that whilst amending the wording and presentation of the questions can aid clarity, it can also impact on the consistency of how numbers are reported.

## Data quality

A comprehensive quality report relating to the survey data will be published early in the New Year and will be available on the Welsh Government website.

## Comparisons with the rest of the UK

Comparable surveys are carried out in the other UK countries. Links to the results of the June 2020 Agricultural Survey for these countries are included below.

- **England**

[Gov.UK website: Structure of the agricultural industry](#)

- **Scotland**

[Scottish Government website: Results of the June Scottish Agricultural Census](#)

- **Northern Ireland.**

[Department of Agriculture, Environment and Rural Affairs Northern Ireland website: Agricultural Census in Northern Ireland](#)

Results for the United Kingdom are published by the [Department of Environment, Food and Rural Affairs](#).

[Provisional results](#) (published 15 October 2020)

[Final results](#) (available 17 December 2020)

## Further information on agricultural statistics within Wales

This release provides headline results of the 2020 survey at an all-Wales level. More detailed results of the survey will be made available in separate future outputs. The other main outputs relating to agricultural statistics are listed below:

- [StatsWales](#): this is the Welsh Government's interactive analysis tool and contains a number of tables covering various aspects of the Agricultural Survey over the period 2007 to 2017. Data for subsequent years will be added as they become available.
- [Farming Facts and Figures](#): a much-abridged version of Welsh Agricultural Statistics that is intended as a quick reference for high level data. For this reason it is published in a hard copy format although the data is available on request. Farming Facts and Figures is also published annually. Next release due July 2021
- [Agricultural Small Area Statistics](#): this presents the most detailed results from the June Agricultural Census each year. To meet the increasing needs for detailed agricultural statistics, this bulletin outlines the trade-off between detail and data quality and provides the user with a data set which attempts to strike a balance between these ends. Next release due July 2021
- [Farm Incomes in Wales](#): this annual bulletin presents the results of the Farm Business Survey which is carried out by the University of Wales, Aberystwyth on behalf of the Welsh Government. Next release due March 2021

Agricultural statistics for Wales are available over a long historical record and this data has been made available in spreadsheet format to accompany this release. For further information on agricultural statistics for Wales, please contact us via one of the methods shown on the front page.

More general information relating to agriculture can be found on the Welsh Government website under the topic [Farming and Countryside](#).



## National Statistics status

The [Office for Statistics Regulation](#) has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the [Code of Practice for Statistics](#).

National Statistics status means that official statistics meet the highest standards of trustworthiness, quality and public value.

All official statistics should comply with all aspects of the Code of Practice for Statistics. They are awarded National Statistics status following an assessment by the UK Statistics Authority's regulatory arm. The Authority considers whether the statistics meet the highest standards of Code compliance, including the value they add to public decisions and debate.

It is Welsh Government's responsibility to maintain compliance with the standards expected of National Statistics. If we become concerned about whether these statistics are still meeting the appropriate standards, we will discuss any concerns with the Authority promptly. National Statistics status can be removed at any point when the highest standards are not maintained, and reinstated when standards are restored.

These statistics last underwent a compliance check against the Code of Practice in 2018. [Compliance Check for Agricultural Statistics](#).

Since the latest review by the Office for Statistics Regulation, we have continued to comply with the Code of Practice for Statistics. This includes:

- Introducing the facility to complete the survey online.
- Continuing to use clear, non-technical language to present the statistics and their context to as wide an audience as possible.
- Headline "latest data" is presented at the top of each section as these will be of most interest to our key users.
- Historical data is provided to accompany this release along with commentary to explain the underlying factors behind historic trends.
- Expanding the detail on how the data is used in other areas of Welsh Government.
- Using other Welsh Government and Farming Union magazines which are circulated to farmers in order to encourage them to return their survey forms.
- In early 2020 to reduce the length of this Release in future by having the Methodology Annex accessible as a stand-alone document on our website which can be referenced via a hyperlink from this document.

## Well-being of Future Generations Act (WFG)

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10)(1) of the Act, the Welsh Ministers must (a) publish indicators (“national indicators”) that must be applied for the purpose of measuring progress towards the achievement of the Well-being goals, and (b) lay a copy of the national indicators before the National Assembly. The 46 national indicators were laid in March 2016

Information on the indicators, along with narratives for each of the well-being goals and associated technical information is available in the [Well-being of Wales report](#).

Further information on the [Well-being of Future Generations \(Wales\) Act 2015](#).

The statistics included in this release could provide supporting narrative to the national indicators and be used by public services boards in relation to their local well-being assessments and local well-being plans.

### Further details

The document is available at: <https://gov.wales/survey-agriculture-and-horticulture-june-2020>

### Next update

November 2021

### We want your feedback

We welcome any feedback on any aspect of these statistics which can be provided by email to [stats.agric@gov.wales](mailto:stats.agric@gov.wales)

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