



June 2021 Survey of Agriculture and Horticulture: Results for Wales

23 November 2021
SDR 362/2021

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 2021 survey returned to its usual format after some modifications in 2020 because of the COVID-19 outbreak ([see Changes in 2021](#)).

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 rise in the number of sheep and lambs reverses the decrease of 0.5 million seen in 2020.



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 2021. 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 2020.

Further information of how the estimates fit into the longer historical context can be found at the foot of the [Changes in 2021](#) section.

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Important changes for the 2021 Survey

The COVID-19 pandemic caused significant impact on planning and carrying out the survey last year (see [2020 Results](#) for more detail). However we were able to carry out this year's survey in the same manner as surveys conducted in previous years. This year's survey was carried out in the same format as agricultural surveys prior to 2020. The main differences from 2020 were:

- The sampling methodology used returned to being a stratified sample across all farms (covered in the associated [Quality Report](#) document). In 2020, only the larger farms were sampled.
- We returned to the more detailed questions set that is used for the survey. The 2020 survey condensed this into a set of key variables which allowed for the continuation of broad trends in these aspects.
- The survey was carried out at the beginning of June with reference to the situation on the farm on 1st June. The 2020 survey was postponed until the end of August although still with a reference date at the beginning of June. This may have led to some reporting errors in 2020 as farmers reported the current situation rather than a retrospective one.

We continued with the option of completing the survey online (this was introduced in 2020). This method elicited 20% of all returns – the same figure as in 2020.

Comparison with previous years

The results presented in this release are the first key estimates from this year's survey. In most cases these are compared with the estimates from the 2020 survey.

The historical context is often the most important perspective on today's numbers – whether that be across several of the most recent years or over a longer period.

Therefore there is a spreadsheet accompanying this release that contains:

- Full variable list to 2021: a time series (1998-2021) showing how the key variables split into more detailed sub-categories. Please note that some of this detail is not available for 2020 as a result of the scaled-down survey carried out last year. (see [2020 Survey results release](#) for more detail)
- Historical context: a time series dating back to 1867 showing the trends in key indicators in the long-term.

In addition, the [2019 Survey Results release](#) contains some commentary highlighting the main contributory factors underlying these trends.

Survey response

The 2021 survey again showed an increased response rate of 51%. This is very welcome, particularly after several years of falling rates until last year. As always the Welsh Government is very grateful to all those farmers who took the time to complete the 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.

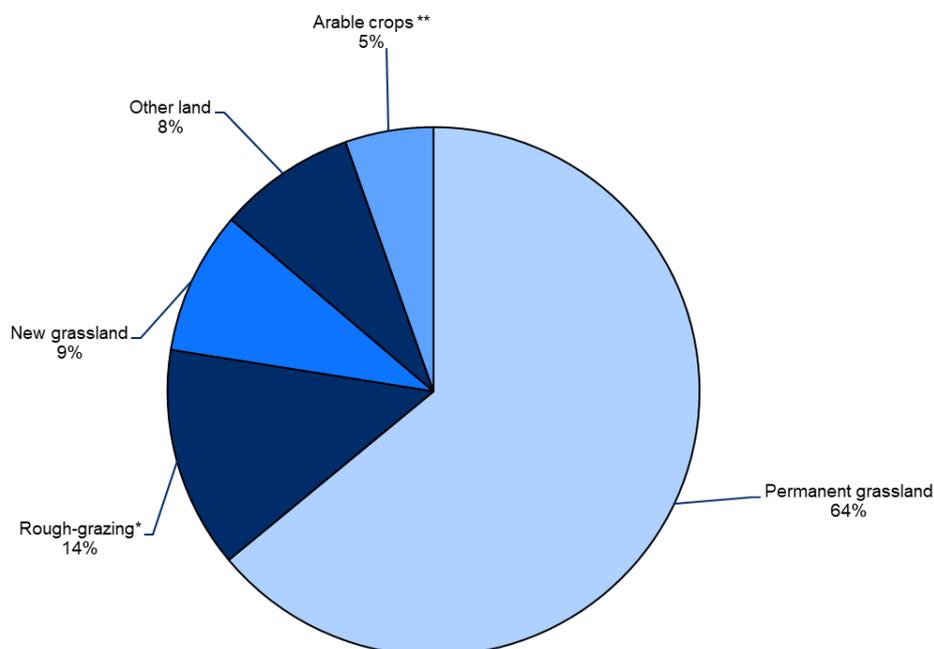
Latest data

The estimates for the 2021 survey for agricultural land use show the following headline figures:

- The total amount of land on holdings rose by 5.1% to **1,783,900 hectares** in June 2021. 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.
- There were **94,300** hectares of arable crops in June 2021. There is no comparable figure from June 2020 as this includes 1,400 hectares of bare fallow which was not collected as a separate item in 2020. However the estimated area (minus bare fallow) in 2020 was 82,700 hectares so it is very likely this represents a significant increase.

The use of land on holdings in Wales in 2021 is illustrated below:

Chart 1: Split of land on agricultural holdings by usage 2021



*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)

The historical series shows that the area of land on farms has steadily increased each year. The current area (1,783,900 hectares) is 17% larger than the equivalent for 1998. Comparisons with other systems (such as Rural Payments Wales) would indicate this to not be a genuine increase.

It is likely that this has resulted as a result of double-counting. The reality of farming is that land tenure is a fluid process. Land is always being bought and sold, rented out and let in. The issue is keeping up with all of these changes and trying to keep a register of farms that is up to date.

Maintaining information about new registrations of farms isn't normally a problem. A farmer will need to be registered to obtain a Customer Reference Number (CRN) for payments purposes and a CPH (holding number) to allow movements of animals. Thus we will become aware of new farms as they initially register.

The problem arises when farming activity ceases. The registration continues but the land is no longer farmed, is let out to another farmer or is sold on. Thus the land could be counted under its original registration and also when it begins to be farmed under its new registration.

The Agricultural Survey identifies around 15,000 holdings that are deemed to be economically inactive. That is there is land associated with them but they are no longer farmed. For that reason they are not sampled for the survey.

The key question is how much of the land on these farms is being farmed elsewhere and thus being double-counted?

This is something that we intend to investigate in more detail in the New Year and we will publish a summary analysis of our conclusions.

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 2021 survey for sheep and lambs show the following headline figures:

- The total number of sheep and lambs in Wales was **9.46 million** – up 5.3% on the previous year's figure. The figures for both sheep and lambs are within 1 per cent of their levels in 2019. This might indicate an under-reporting issue in 2020 stemming from the late running of the survey.
- With the exception of 2020, the number of sheep and lambs in Wales has stayed at a level around 9.5 million for several years.

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 2021 survey for cattle show the following headline figures:

- The total number of cattle and calves in Wales was **1,128,800** – this represents an increase of 0.6% from the figure for June 2020.
- The number of dairy females aged 2+ years that had calved has risen by 1.3% to a figure of **255,400**. This definition is generally accepted as a measure of the dairy herd.
- Using the equivalent definition, the size of the beef herd decreased by 1.5% over the last 12 months to a figure of **159,500**.

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 (4%), the size of the beef herd has fallen considerably (24%).

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. The addition of several further large units underpins the increased numbers of pigs and poultry seen in 2020 and 2021.

Latest data - Pigs

The estimates for the 2021 survey show the following headline figure:

- There was a 4% decrease in the number of pigs in Wales in June 2021. The current total is **27,200**. The majority (90%) of these animals are kept for fattening (meat production) with the remainder used for breeding.

Whilst this is a fall from 2020, the 2021 figure is still higher than the numbers seen in Wales prior to 2020.

Latest data : Poultry

The estimates for the 2021 survey show the following headline figure:

- The total poultry in Wales was **10,352,200** in June 2020 – the majority of these were table chicken or broilers (**6.5 million**) and chicken kept for eggs (**3.1 million** birds).

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 2021 estimates show that:

- The number of principal farmers, directors, business partners and their spouses was **38,000**, an increase of 2% from 2020.
- This number comprises **17,800** full-time principal farmers and **20,200** part-time. These figures are much closer to their equivalent 2019 estimates (than their 2020 ones). The estimates for 2020 showed a steep fall in the number of part-time principal farmers. It was felt at the time that this could be because of a change in working practices during the COVID-19 movement restrictions. The adjustment of the sampling method to only include larger farms could have also impacted on the 2020 figure.
- The number of people employed on farms at 1 June 2021 was **12,400**. This figure is more in line with the number of workers seen in the years prior to 2020. The exceptionally high figure seen last year (15,500) was due to a large increase in the number of casual workers. As noted in last year's release, this may be attributable to the exceptional circumstances in 2020.

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 (and 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 and Survey Methodology

A comprehensive [Quality Report](#) which describes both of these aspects of the survey data was published in February 2021.

Comparisons with the rest of the UK

Comparable surveys are carried out in the other UK countries. Links to the results of the June 2021 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 14 October 2021)

[Final results](#) (available 16 December 2021)

Further information on agricultural statistics within Wales

This release provides headline results of the 2021 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. This series has lapsed as other work has been prioritised during the COVID-19 pandemic. We hope to catch up and publish an up-to-date series in the New Year.
- [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 2022

- [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 2022

- [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 2022

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:

- Continuing to offer 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. 2021 is the second consecutive year in which the response rate has risen after several years of decline.
- Publishing a detailed [Quality Report](#) in February 2021 containing information on data quality and survey methodology. Housing this information separately has reduced the length of this Release.

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: [Survey of Agriculture and Horticulture](#)

Next update

November 2022

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

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