



Llywodraeth Cymru
Welsh Government

STATISTICS, DOCUMENT

Survey of agriculture and horticulture: June 2023

Data for agricultural land use, livestock on farms and the number of people working on agricultural holdings in June 2023.

First published: 23 November 2023

Last updated: 23 November 2023

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Introduction

The June Agricultural and Horticultural Survey has been carried out since 1867 to provide estimates of agricultural activity in Wales on an annual basis.

This Bulletin provide the first estimates of the key variables from the June 2023 survey.

Main points

- Over 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 8.7 million sheep and lambs in Wales is the lowest number since 2011. The intervening years have seen the number fluctuate up and down.
- There are 1.12 million cattle and calves in Wales, a small fall from 1.13 million last year. This fall was more pronounced in the beef herd (4.7%) than the dairy herd (0.5%).
- 51,000 hectares of cereals were grown in Wales in 2023, a fall of 8% from 12 months ago. However the 2022 figure was a peak figure in recent years. To put it in context, the areas of cereals accounts for less than 3% of all agricultural land in Wales.

Survey response

The 2023 survey achieved a response rate of 49% - this represents a slight drop from previous years.

The survey is available to complete online for most farmers. This year 24% of

returns were made online, this represents an increase from previous years (where it was 18%). The Welsh Government hopes that this proportion will continue to increase for future surveys.

As always, the Welsh Government is very grateful to all those farmers who took the time to complete the survey.

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 2022 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 2023: a time series (1998 to 2023) showing how the key variables split into more detailed sub-categories; please note that some of this detail is not available for 2020 because 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

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 much 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.

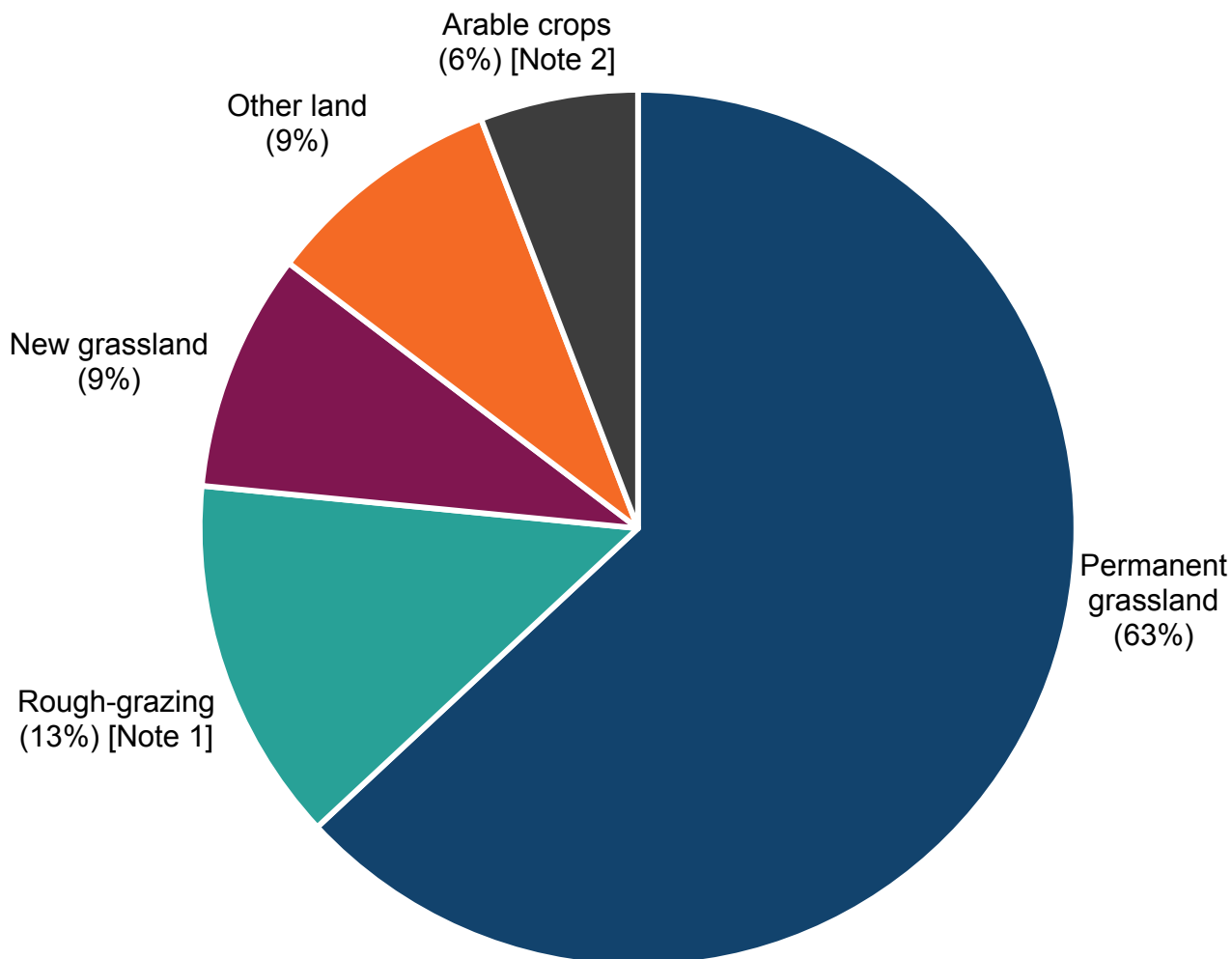
Latest data

The estimates for the 2023 survey for agricultural land use show the following headline figures.

- The total amount of land on holdings was 1,767,700 hectares in June 2023 which represents a 0.1% increase from the previous year. 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 101,500 hectares of arable crops in June 2023. Whilst the area of cereals grown fell, this was more than offset in crops used for stockfeed. This may be explained by the increase in cost of buying in animal feed which has promoted farmers to grow their own, either for feeding their animals or selling.

The use of land on holdings in Wales in 2023 is illustrated below.

Figure 1: Split of land on agricultural holdings by usage, 2022



Description of Figure 1: The chart shows that permanent grassland accounts for nearly two-thirds (63%) of the land on farms in Wales. The remaining land comprises new grassland (9%), rough grazing (13%), arable crops (6%) and other land (9%). Other land is made up of farm woodland, buildings and land not used for agricultural purposes.

[Note 1] Rough grazing where holder has sole rights (ie excludes common rough

grazing).

[Note 2] Includes horticulture (vegetables and fruit grown in the open, hardy nursery stock and glasshouse).

Source: June Agricultural and Horticultural Survey, 2023

The area of land on farms in Wales has risen very slightly (0.1%). Until last year the historical series had shown this figure steadily increasing.

It is likely that this arose 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, let out and rented in. The issue is keeping up with all 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.

Rural Payments Wales has recently undertaken an exercise to contact "dormant" registrations with a view to archiving them unless specifically instructed otherwise. This is likely to be a contributory factor in the reversal of the ever-increasing total area.

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 2023 survey for sheep and lambs show the following headline figures.

- The total number of sheep and lambs in Wales was 8.69 million, down 7.0% on the previous year's figure. This fall could be linked to the increased price in feed which may have caused farmers to reduce livestock numbers or, in some case, cease farming altogether.

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.

Numbers then began to rise again for several years but for the last 10 or so years have fluctuated up and down. However, the current total of 8.7 million is the lowest since 2011.

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](#).

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 move them 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 2023 survey for cattle show the following headline figures.

- The total number of cattle and calves in Wales was 1,116,600 – this represents a decrease of 1.3% from the figure for June 2022.
- The number of dairy females aged 2+ years that had calved has fallen by 0.5% to a figure of 254,700. This definition is generally accepted as a measure of the dairy herd.
- Using the equivalent definition, the size of the beef herd decreased by 4.7% over the last 12 months to a figure of 149,300.

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 (29%).

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](#).

Other livestock in Wales

Economically, the bulk of livestock production from commercial farms in Wales comes from cattle and sheep. The main 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.

Latest data: pigs

The estimates for the 2023 survey show the following headline figure.

- There was an 8% decrease in the number of pigs in Wales in June 2023. The current total is 24,800. The majority (90%) of these animals are kept for fattening (meat production) with the remainder used for breeding.

Latest data: poultry

The estimates for the 2023 survey show the following headline figure.

- The total poultry in Wales was 10,322,900 in June 2023 – the majority (over 90%) of these were either table chicken/broilers (5.1 million) or chicken kept

for laying eggs (4.5 million).

In the early 2000s broiler chickens made up a large majority of the total poultry. The number of chickens for egg production has been increasing for a number of years is not far short of the number of broilers.

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 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.

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 2023 estimates show that:

- the number of principal farmers, directors, business partners and their spouses was 38,200, a fall of less than 200 from 2022
- this number comprises 18,000 full-time principal farmers and 20,200 part-time; it is felt that there may be a reporting issue with some individuals on some smaller units recording as full-time because that is their overall work pattern and not their work pattern just on the farm; the extent of this is unknown
- the number of people employed on farms at 1 June 2022 was 12,000 – an increase of 5% since 2022; this trend was seen in both regular workers (full-time and part-time) and casual workers

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, most 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 2022 Agricultural Survey for these countries are included below.

England

[Gov.UK website \(Department for Environment, Food & Rural Affairs\):](#)

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](#). These will be published on 14 December 2023.

Further information on agricultural statistics within Wales

This release provides headline results of the 2023 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.

[Agricultural Survey \(StatsWales\)](#): this is the Welsh Government's interactive analysis tool and contains a series of tables covering various aspects of the Agricultural Survey over the period 2007 to 2017. This series has lapsed as resources have not been available to update the series. We plan to update the StatsWales data by Spring 2024.

Farming Facts and Figures: traditionally this was a hard copy, pocket-sized leaflet which provided a quick reference for high level data. This will now be published online which has created an opportunity to review content.

Next release due January 2024.

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 Spring 2024.

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 January 2024.

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**.

Quality information

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 (UK Statistics Authority)**.

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. Also using the Rural Payments Wales electronic messaging service for the same purpose.

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 wellbeing of Wales. The Act puts in place seven wellbeing 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 wellbeing goals, and (b) lay a copy of the national indicators before Senedd Cymru. Under section 10(8) of the Well-being of Future Generations Act, where the Welsh Ministers revise the national indicators, they must as soon as reasonably practicable (a) publish the indicators as revised and (b) lay a copy of them before the Senedd. These national indicators were laid before the Senedd in 2021. The indicators laid on 14 December 2021 replace the set laid

on 16 March 2016.

Information on the indicators, along with narratives for each of the wellbeing goals and associated technical information is available in the [Wellbeing 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.

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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SFR 99/2023



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