Country Profile United Kingdom

1. Geography, Population & Economy

Geography & Population

Area: 243,610 sq.km    Population: 64.1 million (2013). England, Northern Ireland, Scotland and Wales each have their own system of administrative and geographic demarcation. Consequently, there is "no common stratum of administrative unit encompassing the United Kingdom".

Economy:

GDP: £1,791 billion (2014)

Agricultural products: wheat, barley, potatoes, sugar beet, oilseeds, milk, beef, lamb, pork, poultry meat.

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Country Profile United Kingdom

2. Macroeconomic and Agricultural Indicators (2014 unless otherwise indicated)

### Area and agricultural structure

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Labour force</td>
<td>30.19 million</td>
</tr>
<tr>
<td>Workers in Agriculture</td>
<td>476,000</td>
</tr>
<tr>
<td>Workers in Agriculture as % of labour force</td>
<td>1.6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Area (thousand hectares)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Utilised Agricultural Area (UAA)</td>
<td>17,240</td>
</tr>
<tr>
<td>Total area on agricultural holdings</td>
<td>17,257</td>
</tr>
<tr>
<td>of which: croppable area</td>
<td>6,278</td>
</tr>
<tr>
<td>permanent grassland</td>
<td>9,755</td>
</tr>
<tr>
<td>woodland</td>
<td>897</td>
</tr>
</tbody>
</table>

| Number of agricultural holdings | 212,000 |
| of which: > 50 hectares | 75,000 |
| Number with cereals (2013) | 50,100 |
| Cereal area (thousand hectares) | 3,179 |
| Number with dairy cows (2013) | 21,500 |
| Dairy herd (thousands) | 1,841 |
| Number with beef cows (2013) | 59,800 |
| Beef herd (thousands) | 1,569 |
| Number with sheep & lambs (2013) | 74,400 |
| Total sheep and lambs (thousands) | 33,743 |
| Number with pigs (2013) | 11,000 |
| Total pigs (thousands) | 4,815 |

**Classification of farms as a % of total—England only (2013):**

- Cereal farms: 16%
- General cropping farms: 15%
- Dairy farms: 7%
- LFA livestock farms: 12%
- Lowland livestock farms: 32%
- Pigs & poultry: 5%
- Mixed farms: 8%
- Other farms including horticulture: 5%

**Agri-food sector’s % of national gross value added (2013):** 6.8%

**Food production to supply ratio (self-sufficiency):**

- As a % of all food: 62%
- As a % of indigenous type food: 76%
- UK food, feed & drink share of total exports: 6.1%
- UK food, feed & drink share of total imports: 9.5%
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3. Key Figures for the Agricultural Machinery Sector

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market volume total</td>
<td>£m</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tractors</td>
<td>£m</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Units</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agricultural machinery excluding tractors</td>
<td>£m</td>
<td></td>
<td></td>
</tr>
<tr>
<td>of which: Combine harvesters*</td>
<td>£m</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Units</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National production total</td>
<td>£m</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Number of people employed in manufacturing</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Agricultural engineering Imports grand total</td>
<td>£m</td>
<td>1,832</td>
<td>1,712</td>
</tr>
<tr>
<td>of which: Agricultural tractors</td>
<td>£m</td>
<td>585</td>
<td>533</td>
</tr>
<tr>
<td>Agricultural machinery</td>
<td>£m</td>
<td>848</td>
<td>779</td>
</tr>
<tr>
<td>Main source countries (2013):</td>
<td>Germany, France, USA, Italy, Netherlands, Belgium</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agricultural engineering exports grand total</td>
<td>£m</td>
<td>1,664</td>
<td>1,663</td>
</tr>
<tr>
<td>of which: Agricultural tractors</td>
<td>£m</td>
<td>916</td>
<td>864</td>
</tr>
<tr>
<td>Agricultural machinery</td>
<td>£m</td>
<td>393</td>
<td>392</td>
</tr>
<tr>
<td>Main destination countries (2014):</td>
<td>USA, France, Germany, Ireland, Canada, Sweden</td>
<td></td>
<td></td>
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</tbody>
</table>

*NB Calendar year data (seasonal data is normally used for the combine market)
Market Situation

Total output of UK agricultural engineering in 2014 is provisionally estimated at just under £2 billion, marginally down on 2013 in value terms.

The total UK exports of agricultural equipment products was 2% higher than in 2014 at £1.7 billion.

Within that total the value of exports of agricultural tractors increased by 5.3% to £910 million; in addition there was some £11m of exports of walking and other tractors. Exports of agricultural machinery were up by 4.5% to £410 million. Non-agricultural mowers rose by 20.6% to £132 million.

The EU-28 was the largest customer area taking 65% of machinery exports (+14%) and 55% of tractor exports (+5%). Other regions showing percentage advances in exports included North America and Australasia.

The overall market for all agricultural machinery in the UK is estimated to have slipped back in value by some 3% in 2014.

The number of agricultural tractors (over 50 hp) registered for road use slid just 0.5% to 12,433 in 2014. As average horsepower continued to increase, the value of the market is estimated to have risen some 3% to £735m. Registrations in 2015 are expected to be down on last year due to poorer returns for both arable and dairy.

Several machine types are recorded on a seasonal year basis at retail level and therefore the data on these machine types are more accurate. For combine harvesters the market held up better than was anticipated with the latest (2013/14) season seeing a total of 800 units sold (+4%) as the attraction of tax allowances continued.

For self-propelled forage harvesters the market advanced 7% to 160 units. Large rectangular balers decreased only marginally from the all-time high of 315 in the two preceding seasons to 310 units. Round balers, including combination baler-wrapers, fell by 10% to 1,300 units. For most of these products a decline is expected for the current (2014/15) season.

A generous scheme of tax reliefs on capital investment – the Annual Investment Allowance – was introduced on a temporary basis until 2015 but the positive impact was tempered by the fact that farmers generally did not have large profits to shelter.

Wholesales of individual machine types were variable in 2014 but in general were somewhat lower than in 2013, notable exceptions being ploughs, some items of grass harvesting equipment, and sprayers (which had suffered a significant fall in 2013).

Surveys of company sales by value point to 2014 levels having been rather similar overall to 2013 in real terms.

The primary driver of investment is the financial viability of farming and the resultant confidence in future prospects.

Farm incomes are the prime indicator of the health of farming and these are provisionally calculated to have fallen 4.4% in 2014; whilst some costs reduced the decline of product price in the second half of the year more than offset this. It is expected that 2015 farm incomes will decline further as product prices continue to be weak.

The Single Farm Payments comprise a large component of farm incomes and the strength of sterling at the official conversion date meant that 2014 payments were reduced by some 7% purely due to currency movements.

The CAP reforms came into effect at the beginning of 2015; the overall impact is expected to be manageable but farmers will have additional responsibilities to qualify for support and the value of payments will reduce.

2015 will be a challenging year for the farm machinery industry as farmers are very cautious but the longer term outlook remains positive with the requirement to ensure that we can feed a growing global population.
Country Profile United Kingdom

5. Contact Addresses

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Agricultural Machinery Dealers Association: BAGMA
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Agricultural Contractors Association: NAAC
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Web: http://www.nfuonline.com/home

FUW (Farmers’ Union of Wales)
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Web: http://www.nfus.org.uk

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Web: http://ufuni.org/

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Email: defra.helpline@defra.gsi.gov.uk
Web: http://www.gov.uk/defra

The Scottish Government
St. Andrew’s House, Regent Road
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EH1 3DG
http://www.scotland.gov.uk/topics/farmingrural/agriculture

National Assembly for Wales
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CF99 1NA
http://wales.gov.uk/topics/environmentcountryside

DARD (Northern Ireland) (Department of Agriculture and Rural Development)
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Ballymiscaw, Belfast
BT4 3SB
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Web: http://www.dardni.gov.uk

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Web: http://www.agindustries.org.uk

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Web: http://www.fwi.co.uk/

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Web: http://www.farmersguardian.com/

**Profi**
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Email: marketing@profi.com
Web: http://www.profi.com/

**Farmers Guide**
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Ipswich, Suffolk
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Email: jane@farmersguide.co.uk
Web: http://www.farmersguide.co.uk

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Email: journals@farmcontractor-uk.com
Web: http://www.farmcontractor-uk.com/

**British Farmer & Grower**
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Fax: +44 (0) 2476 858501
Web: http://www.nfu.org.uk

**Crop Production Magazine**
White House Barn
Hanwood
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Web: http://www.cpm-magazine.co.uk

**Service Dealer**
Chris Biddle Media
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Email: chris.biddle@btinternet.com
Web: http://www.sd-update.co.uk

**National Farmer (digital)**
Business Independent (Publishing) Ltd
19 - 25 Hill Street, Poole
Dorset
BH15 1NR
Tel: +44 (0) 1202 666602
Web: http://www.nationalfarmer.net
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7. Main Trade Shows

**LAMMA (annual)**
http://www.lammashow.co.uk
20th & 21st January 2016
East of England Showground, Peterborough

**Cereals (annual)**
http://www.cerealsevent.co.uk/
10th & 11th June 2015, North Lincolnshire

**Livestock (annual)**
http://www.livestockevent.co.uk/
8th & 9th July 2015, NEC, Birmingham

**Royal Highland (annual)**
http://royalhighlandshow.org/
18th—21st June 2015, Edinburgh

**Royal Welsh (annual)**
http://www.rwas.co.uk/en/welsh-show/
20th—23rd July 2015, Llanelwedd, Builth Wells

**Tillage-Live (annual)**
http://www.tillage-live.uk.com/
16th September 2015
Croft Farms, Croft-on-Tees, Darlington, North Yorkshire

**Pig & Poultry Fair (biennial)**
http://www.pigandpoultry.org.uk/
10th & 11th May 2016, Stoneleigh Park, Warwickshire

**Grassland & Muck (triennial)**
http://www.biztradeshows.com/trade-events/grassland-muck.html
24th & 25th May 2017 (provisional)
RASE, Stoneleigh Park, Warwickshire

**ScotGrass (triennial)**
May 2016
Details to be confirmed

**Grassland UK (triennial)**
http://www.bathandwest.com/grassland-uk/194
7th May 2015
Royal Bath & West Showground, Shepton Mallet, Somerset, BA4 6QN