Country Profile United Kingdom

1. Geography, Population & Economy

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

Area and agricultural structure		
Labour force		30.19 million
Workers in Agriculture		476,000
Workers in Agriculture as % of labour force		1.6%
Area (thousand hectares)		24,361
	Utilised Agricultural Area (UAA)	17,240
	Total area on agricultural holdings	17,257
	of which: croppable area	6,278
	permanent grassland	9,755
	woodland	897
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

		2012	2013	2014
Market volume total	£m	2,032	1,944	1,941
Tractors	£m	769	714	735
	Units	13,951	12,498	12,433
Agricultural machinery excluding tractors	£m	1,263	1,230	1,206
of which: Combine harvesters*	£m	208	219	172
	Units	855	860	665
National production total (ag mcy & tractors)	£m	1,499	-	-
Number of people employed in manufacturing		-	-	-
Agricultural engineering Imports grand total	£m	1,832	1,712	1,773
of which: Agricultural tractors	£m	585	533	557
Agricultural machinery	£m	848	779	911
Main source countries (2013):	Germany, France, USA, Italy, Netherlands, Belgium			
Agricultural engineering exports grand total	£m	1,664	1,663	1,699
of which: Agricultural tractors	£m	916	864	910
Agricultural machinery	£m	393	392	410
Main destination countries (2014):	USA, France, Germany, Ireland, Canada, Sweden			

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

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4. Market and Business Situation

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-wrappers, 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 being 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.

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5. Contact Addresses

Agricultural Machinery Association:
AEA
Samuelson House, 62 Forder Way
Hampton, Peterborough
PE7 8JB
Tel: +44 (0) 8456 448748
Fax: +44 (0) 1733 314767
Email: ab@aea.uk.com
Web: http://www.aea.uk.com

Agricultural Machinery Dealers Association:
BAGMA
Middleton House, 2 Main Road
Middleton Cheney, Banbury, Oxfordshire
OX17 2TN
Tel: +44 (0) 1295 713344
Fax: +44 (0) 1295 711665
Email: info@bagma.com
Web: http://www.bagma.com

Agricultural Contractors Association:
NAAC
The Old Cart Shed, Easton Lodge Farm
Old Oundle Road, Wansford, Peterborough
PE8 6NP
Tel: +44 (0) 8456 448750
Fax: +44 (0) 1780 784933
Email: jill.hewitt@naac.co.uk
Web: http://www.naac.co.uk

Farming Unions:
NFU (England)
Agriculture House, Stoneleigh Park
Stoneleigh, Warwickshire
CV8 2TZ
Tel: +44 (0) 2476 858500
Fax: +44 (0) 2476 858501
Web: http://www.nfuonline.com/home

FUW (Farmers' Union of Wales)
Llys Amaeth, Plas Gogerddan
Aberystwyth, Ceredigion
SY23 3BT
Tel: +44 (0) 1970 820820
Fax: +44 (0) 1970 820821
Web: http://www.fuw.org.uk

NFUS (Scottish Farming Union)
Head Office, Rural Centre - West Mains
Ingliston, Midlothian
EH28 8LT
Tel: +44 (0) 131 472 4000
Fax: +44 (0) 131 472 4010
Email: webmaster@nfus.org.uk
Web: http://www.nfus.org.uk

Ulster Farmers' Union
475 Antrim Road
Belfast, Antrim
BT15 3DA
Tel: +44 (0) 2890 370222
Email: info@ufuhq.com
Web: http://ufuni.org/

Agriculture departments:
Defra
Nobel House, 17 Smith Square
London
SW1P 3JR
Tel: +44 (0) 8459 335577
Email: defra.helpline@defra.gsi.gov.uk
Web: http://www.gov.uk/defra

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

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

DARD (Northern Ireland) (Department of Agriculture and Rural Development)
Dundonald House, Upper Newtownards Road
Ballymiscaw, Belfast
BT4 3SB
Tel: +44 (0) 300 200 7852
Email: dardhelpline@dardni.gov.uk
Web: http://www.dardni.gov.uk

Agricultural Supply Industry body:
AIC
Confederation House
East of England Showground
Peterborough
PE2 6XE
Tel: +44 (0) 1733 385230
Fax: +44 (0) 1733 385270
Email: david.caffall@agindustries.org.uk
Web: http://www.agindustries.org.uk/

Levy Board:
AHDB
Stoneleigh Park, Kenilworth
Warwickshire
CV8 2TL
Tel: +44 (0) 2476 692051
Email: info@ahdb.org.uk
Web: http://www.ahdb.org.uk

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6. National Magazines

Farmers Weekly
Quadrant House, The Quadrant
Sutton, Surrey
SM2 5AS
Telephone: +44 (0) 208 652 4911
Fax: +44 (0) 208 652 4005
Email: fwiinfo@rbi.co.uk
Web: http://www.fwi.co.uk/

Farmers Guardian
Unit 4, Fulwood Park
Caxton Road, Preston
PR2 9NZ
Tel: +44 (0) 1772 799459
Email: FGSupport@farmersguardian.com
Web: http://www.farmersguardian.com/

Profi
Agri Publishing International Ltd
Goblands Farm, Court Lane
Hadlow, Tonbridge, Kent
TN11 0EB
Tel: +44 (0) 1732 582388
Fax: +44 (0) 1732 852488
Email: marketing@profi.com
Web: http://www.profi.com/

Farmers Guide
Early Bird Farming Publications Ltd.
Parkside, London Road
Ipswich, Suffolk
IP2 0SS
Tel: +44 (0) 1473 691888
Email: jane@farmersguide.co.uk
Web: http://www.farmersguide.co.uk

Farm Contractor
ACP Publishers Ltd.,
The Offices, Brixfield Farm
Kineton, Warwickshire
CV35 0ED
Tel: +44 (0) 1926 691212
Fax: +44 (0) 1926 642060
Email: journals@farmcontractor-uk.com
Web: http://www.farmcontractor-uk.com/

British Farmer & Grower
NFU, Agriculture House
Stoneleigh Park, Warwickshire
CV8 2TZ
Tel: +44 (0) 2476 858500
Fax: +44 (0) 2476 858501
Web: http://www.nfu.org.uk

Crop Production Magazine
White House Barn
Hanwood
Shrewsbury
SY5 8LP
Tel: +44 (0)1728 622521
Web: http://www.cpm-magazine.co.uk

Service Dealer
Chris Biddle Media
12 Kingfisher Close
Salisbury, Wiltshire
SP2 8JE
Tel: +44 (0) 7785 295625
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