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Summary

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All figures relate to 2022 and the change between 2021 and 2022 unless otherwise stated.

Structure of industry

- The **Utilised Agricultural Area** (UAA) decreased by 2.2% and was 17 million hectares, covering 69% of land in the UK.
- The **total croppable area** saw little change and was 6.0 million hectares.
- The **cereal crops area** decreased by 1.7% and was 3.2 million hectares.
- The **area of oilseed crops** planted increased by 13% and was 398 thousand hectares.
- The **total number of cattle and calves** remained almost unchanged and was 9.6 million animals. The beef herd decreased by 1.5% and was 1.5 million animals. The dairy herd decreased by 0.4% and was 1.8 million animals.
- The **total number of pigs** decreased by 2.5% and was 5.2 million animals. The total number of female pigs in the breeding herd decreased by 14% and was 343 thousand animals.
- The **total number of sheep and lamb** increased by 0.3% and was 33 million animals.
- The **total number of poultry** decreased by 1.0% and was 188 million birds.
- The **total labour force** on commercial holdings increased by 0.7% and was 471 thousand people.

Farming income

- In 2021/22, the average **Farm Business Income (FBI)** across all UK farm types, at current prices, was £72,000 compared to £46,500 in 2020/21.
- **FBI** varies greatly with 10% of UK farms failing to make a positive FBI in 2021/22 while 41% of farms had an FBI of over £50,000.
- In 2022/23, exceptional price volatility, both in terms of input costs and output revenue, is forecast to be one of the key factors influencing Farm Business Income.

Accounts

- **UK Total Income from Farming (TIFF)** in 2022 was £7.9 billion, an increase of £1.1 billion (17%) from 2021. Following an exceptional year of price volatility, this large increase in TIFF was driven by price increases across the majority of commodities in this account, which more than offset increases in input prices.
- **Total livestock output** in 2022 was £19.3 billion, an increase of £2.7 billion (16%) from 2021. This increase was driven by a substantial 40% increase in the value of milk, which is consistently the largest contributor to livestock value. Milk reached record high farmgate prices of up to 51.6 pence per litre in 2022 as a result of high production costs, which also led to a slight reduction in production and supply.
- In 2022, **total crop output** increased by £2.4 billion (22%) from 2021, to £13.3 billion. This increase was driven by a 50% increase in the value of wheat, which saw a 35% increase in unit price following disruption to the global cereals market from the war in Ukraine, as well as a 10% increase in average yield boosted by favourable planting conditions in the autumn of 2021.
- **Intermediate consumption** increased by £3.6 billion (19%) from 2021, to £22.1 billion in 2022. This increase was predominantly driven by a 24% increase in the value of compound animal feed, which is consistently the largest contributor to intermediate consumption, and a 78% increase in the value of fertiliser. The average price of fertiliser increased by 104% from 2021, following substantially reduced domestic production as a result of rising natural gas prices.
- In 2022, **agriculture's contribution to the UK economy (Gross Value Added at basic prices)** was £13.9 billion (0.6% of GDP). This constitutes an increase of £1.8 billion (15%) in GVA compared to 2021.

Productivity

- **Total Factor Productivity** is estimated to have increased by 3.4% between 2021 and 2022. This was driven by a decrease in the volume of all inputs and a slight increase in the volume of all outputs.
- The volume of **all outputs** decreased by <0.1%. 2022 saw an increase in total crop output of 1.7% whilst total livestock output decreased by 1.7%. The notable changes in crop output were increases in oilseed rape (39%) and barley (12%), with decreases in sugar beet (-18%) and in 'vegetables and horticultural products' (-4.9%). All livestock outputs in 2022 changed

by less than 4% up or down except for the output of eggs which fell by 21%.

- The volume of **all inputs** decreased by 3.3%. This decrease in the volume of inputs is the result of decreases across all input items in the account except veterinary expenses and labour, which saw small increases. The inputs that saw the largest percentage decreases were fertilisers (-13%), seeds (-12%) and animal feed (-6.7%).

Prices

- The annual average price index for all agricultural **outputs** increased by 19% from 2021 to 2022.
- The largest upward contribution to the annual inflation rate for agricultural **outputs** was from milk (8.2 percentage points), followed by wheat (3.1 percentage points) and barley (1.7 percentage points). The main downward contribution came from forage plants (-0.2 percentage points).
- The annual average price index for all agricultural **inputs** increased by 28% from 2021 to 2022.
- The largest upward contribution to the annual inflation rate for agricultural **inputs** was from fertilisers and soil improvers (9.6 percentage points), followed by compound feedingstuffs (6.8 percentage points) and energy and lubricants (4.2 percentage points).

Crops

- Harvested production of **wheat** increased by 11% to just over 15.5 million tonnes, primarily due to increased yields. The value of production was 50% higher at £4.1bn.
- Harvested production of **barley** increased by 6.1% to around 7.4 million tonnes. The value of production was 55% higher at £1.8bn.
- **Oilseed rape** production increased by 39% to around 1,361 thousand tonnes, due to the increase in planted area compared to 2021 (which was the lowest area since 1986) and average higher yields. The value of production increased by 80% to £877m due to higher prices
- **Sugar beet** production decreased by 18% to 6.0 million tonnes. The value of production was 6.2% higher at £223m.
- The value of **vegetable** production increased by 4.8% to £1.8bn.
- The value of **fruit** production increased by 9.5% to just over £1.0bn.

Livestock

- The value of **beef and veal** increased by 12% to £3.8bn. Home-fed production increased by 2.0% to 928 thousand tonnes.
- The value of **pig meat** increased by 18% to £1.7bn. Home-fed production increased by 0.5% to 1,002 thousand tonnes.
- The value of **mutton and lamb** production increased by 3.3% to £1.6bn. Home-fed production increased by 2.9% to 302 thousand tonnes.
- The value of **poultry meat** increased by 3.9% to £3.1bn. Home-fed production decreased by 1.9% to 2.0 million tonnes.
- The value of **milk and milk products** increased by 40% to £6.7bn, due to increased prices.
- The value of **eggs** for human consumption decreased by 4.0% to £786m. Production decreased by 7.2% to 0.9 billion dozens.

Intermediate consumption

- The total cost of **intermediate consumption** was £22,084 million, an increase of £3,560 million (19%) from 2021 to 2022.
- The value of **animal feed** increased by £1,690 million (26%) from 2021 to £8,270 million in 2022.
- The value of **energy** increased by £690 million (48%) from 2021 to £2,138 million in 2022.
- The total value of **fertilisers** was £2,490 million, an increase of £1,091 million (78%) from 2021 to 2022.

Public payments

- Total **direct payments** to farmers decreased by £83 million (-3.0%) from 2021, to £3,213 million in 2022.
- **Basic Payment Scheme (BPS)** payments decreased by £222 million (-7.9%) from 2021, to £2,603 million in 2022.
- Payments linked to **agri-environment schemes** increased by £2 million (0.5%) from 2021, to £357 million in 2022.

Agri-environment

- Estimated greenhouse gas and air pollution emissions from agriculture have fallen between the year 2000 and 2021.
- Since the late 1990’s **nitrogen and phosphate fertiliser application rates** have fallen.
- A comparison of **soil nutrient balances** (in kg per hectare) from the year 2020 to 2021 shows a 5.3% increase for **nitrogen** and a 17% decrease for **phosphorus**.
- The **farmland bird index**, a good indicator for general biodiversity on farms, has decreased since 1970 with the index for all farmland species in 2021 less than half of 1970 levels.

Organic farming

- 509 thousand hectares were **farmed organically** in the UK.
- 61% (312 thousand hectares) of the total **UK organic area was in England**.
- **Permanent pasture (inc. rough grazing)** accounted for 62% of UK organic land, covering 314 thousand hectares.
- 9.7% of the total UK organic area was used to grow **cereals** (49 thousand hectares).
- 3.1% of the total UK **cattle population was reared organically**.
- There were a total of 5.5 thousand **organic operators** in the UK.

Overseas trade

- The value of **food, feed and drink exports** increased by £2.8 billion (13%) to £24.9 billion.
- The value of **food, feed and drink imports** increased by £3.0 billion (5.3%) to £58.1 billion.
- The trade gap in **food, feed and drink** increased slightly by £132 million (0.4%) to £33.2 billion.

- Principal destinations for **exports** were the Irish Republic (£3.9 billion), France (£2.7 billion), USA (£2.4 billion) and the Netherlands (£2 billion).
- The main countries of despatch for **imports** into the UK were the Netherlands (£7.3 billion), France (£5.8 billion), Irish Republic (£4.5 billion) and Belgium (£4.3 billion).
- Whisky continued to have the **highest export value**, totalling £6.4 billion. This was an increase of 28% compared to the previous year.
- Fresh fruit and vegetables together remained the **highest value category for imports**, totalling £6.6 billion, a decrease of 1.9% .
- **Exports of fresh vegetables** rose by 19.0% to £85 million, and **exports of fresh fruit** also rose by 3.3% to £64m.

The food chain

- In 2021, the agri-food sector (excluding fishing) in the United Kingdom accounted for a total estimated **Gross Value Added (GVA)** of £127bn or 6.2% of national GVA, a increase of 13% since 2020. The non-residential catering sector increased by 32% between 2020 and 2021. All other sectors also saw an increase.
- **Employment** in the agri-food sector grew by 3.3% over the 12-month period to the fourth quarter of 2022 to just under 4.2 million. The largest percent change was seen in non-residential catering which rose by 7.9% (144,000 employees).
- **Total factor productivity** of the food chain decreased by 1.5% while there was a decrease of 1.1% in productivity in the wider economy. In the 10 years prior to 2020, the average annual growth rate of the food chain was 0.1% while the wider economy's average annual growth rate was 0.2%.
- **Consumer expenditure** on food and alcoholic drinks (at constant prices) increased by 7% from 2021 to 2022 and was 20% higher than in 2012. Expenditure on food and drink eaten out increased by 29% from 2021 to 2022, whilst expenditure on household food and alcoholic drinks (off-licence only) decreased by 6.9% and 9.6% respectively.