

Arable Sector Update

A decorative graphic on the left side of the slide consists of several overlapping, semi-transparent green diamonds of various shades, ranging from light to dark green. The bottom-most diamond is a photograph of a green field at sunset, with the sun low on the horizon, casting a warm glow over the landscape.

David Ross
Regional Development Manager

SAC Consulting is a division of Scotland's Rural College

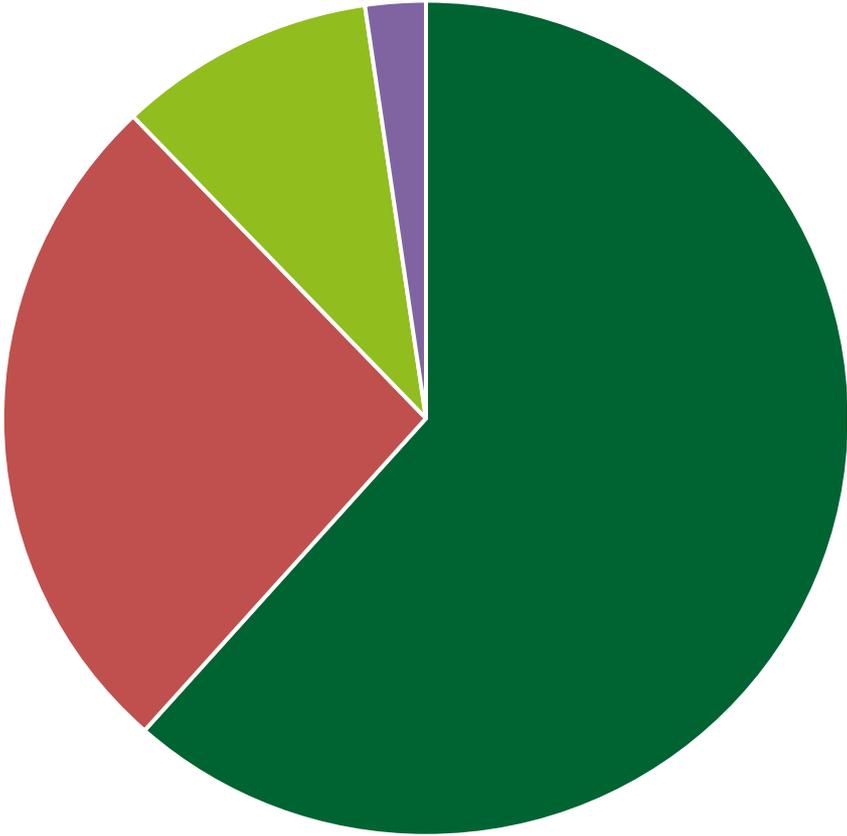
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North East Land Use

(Source: Economic Report on Scottish Agriculture 2017)



Hectares

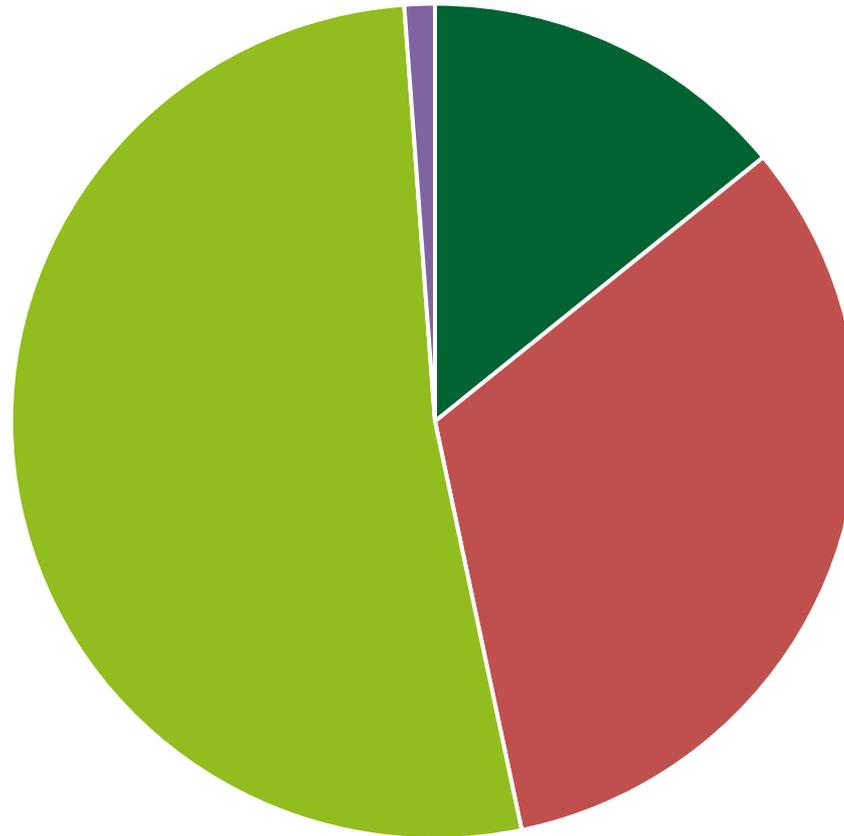


■ Grassland ■ Arable ■ Woodland ■ Other

Grassland areas

(Source: Economic Report on Scottish Agriculture 2017)

Hectares

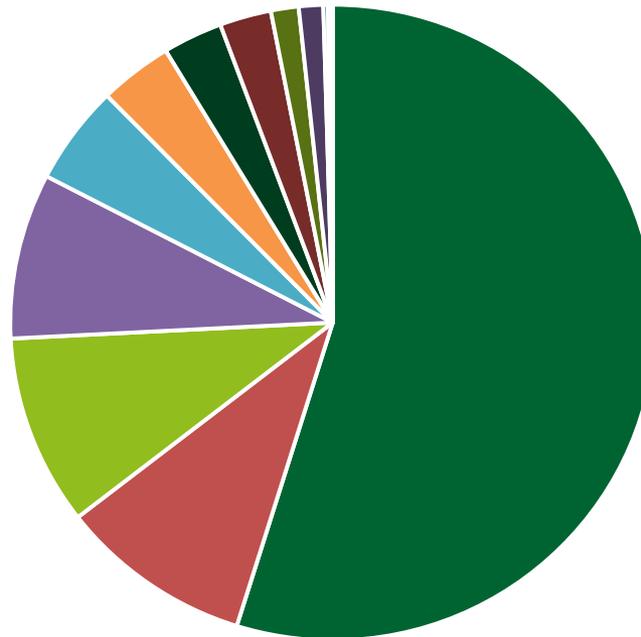


■ Grazing less than 5 years ■ Grazing 5 years old or over ■ Rough Grazing ■ Common Grazing

Cropping areas

(Source: Economic Report on Scottish Agriculture 2017)

Hectares



■ Spring Barley

■ Wheat

■ Potatoes

■ Vegetables

■ Orchard and Soft fruit

■ Fallow

■ Oilseed Rape and Linseed

■ Stockfeed crops

■ Bulbs and flowers

■ Winter Barley

■ Oats, triticale and mixed grain

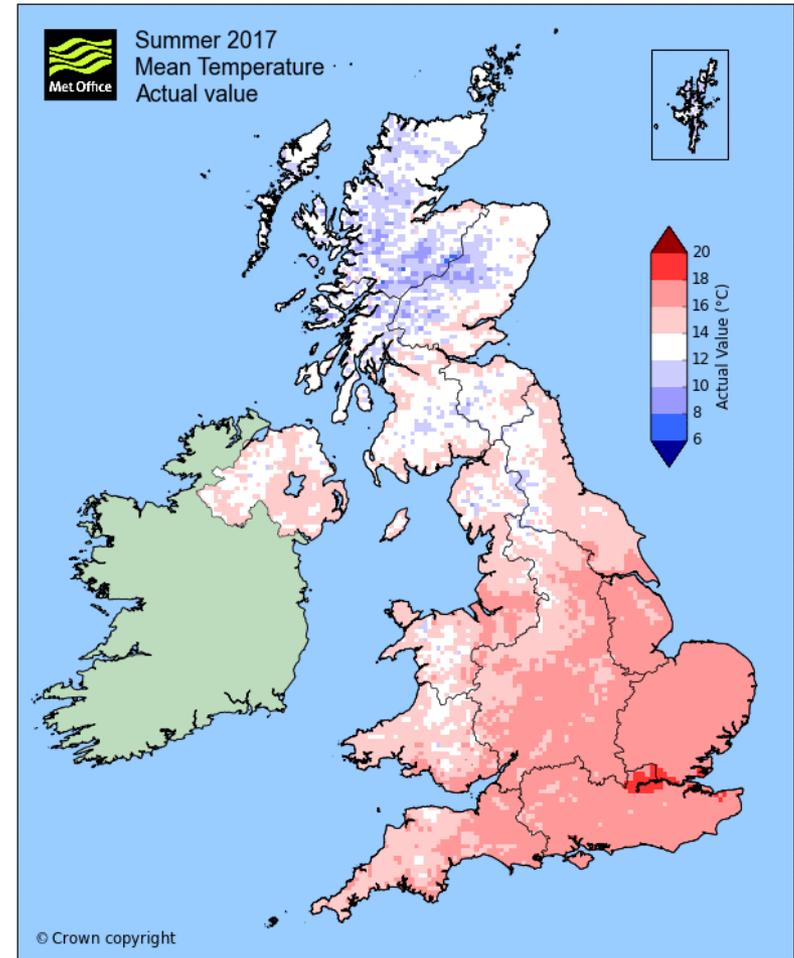
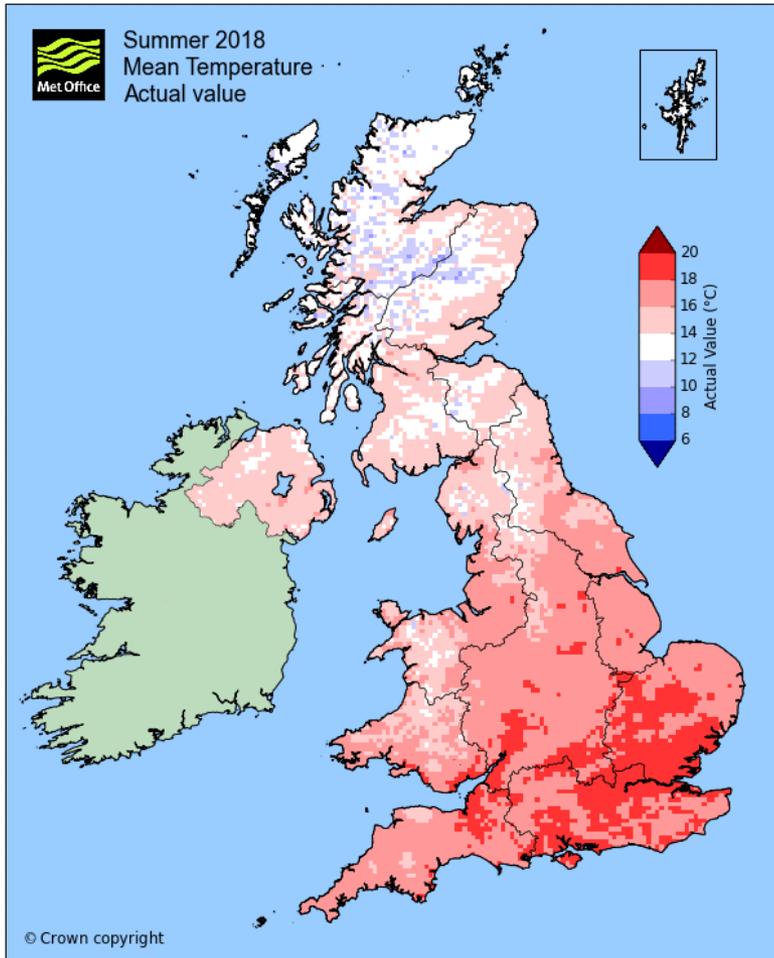
■ All other crops

■ Peas and Beans

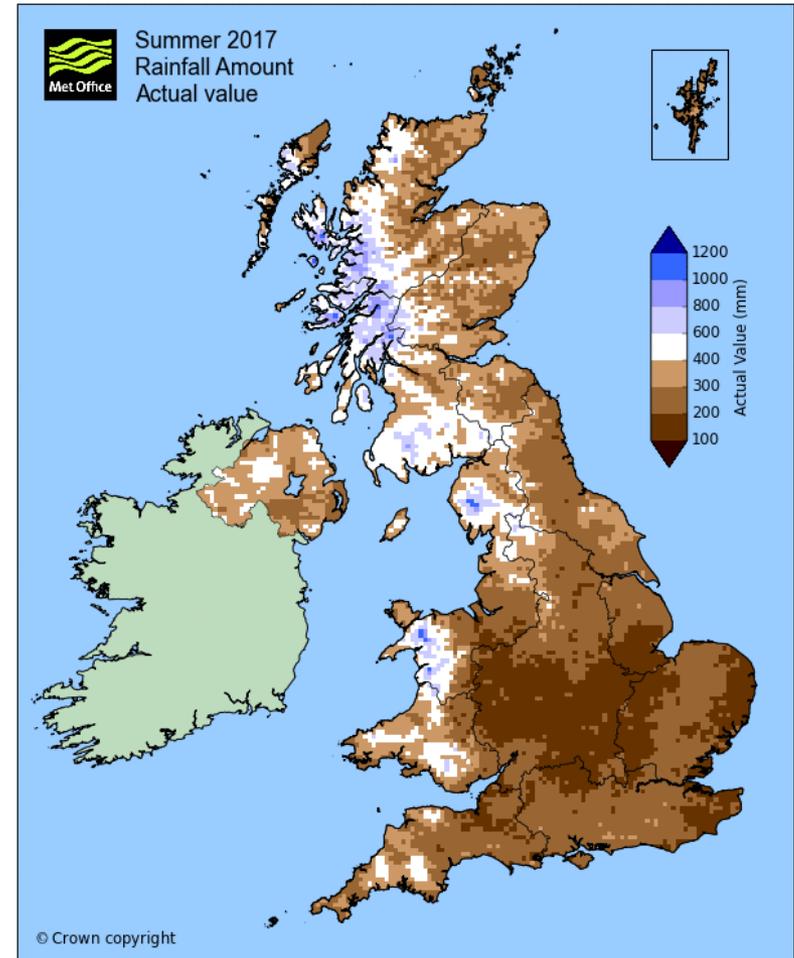
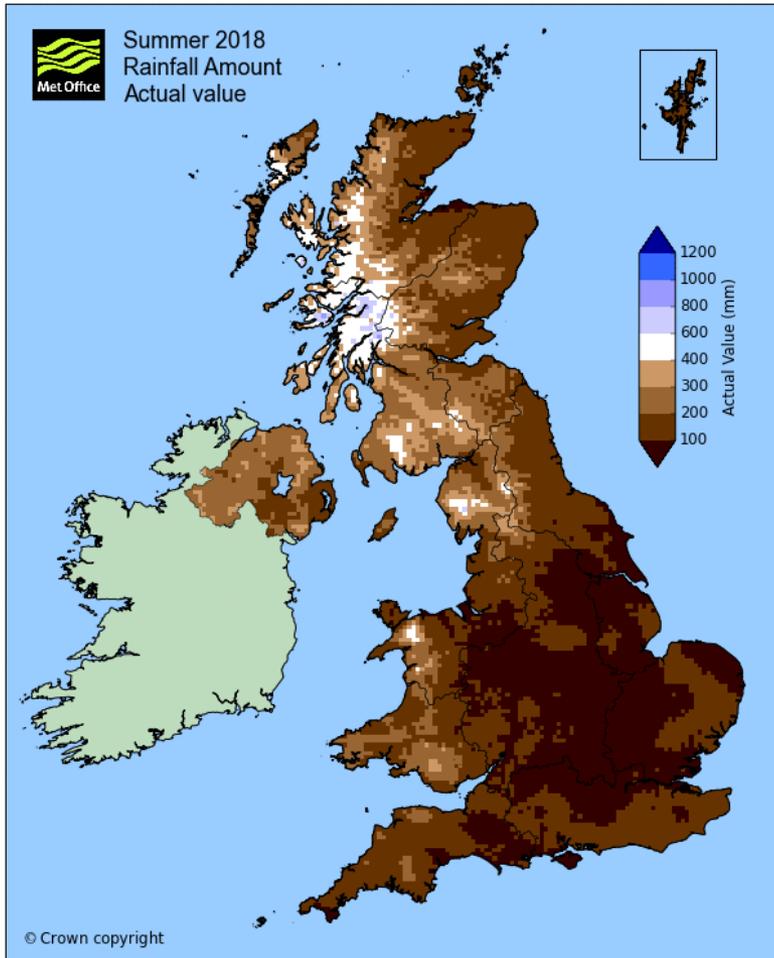
Changes since 2014

	2014	2016	Percentage Change
Wheat	15936	15554	-2.39%
Winter Barley	20100	17897	-10.96%
Spring Barley	106342	101241	-4.79%
Oats, triticale and mixed grain	5391	6809	+26.30%
Oilseed Rape and Linseed	10883	9302	-14.53%
Potatoes	5298	5529	+4.36%
Peas and Beans	544	270	-49.63%
Stockfeed Crops	4362	4778	+9.54%
Vegetables	2057	2257	+9.72%
Orchard & Soft Fruit	178	166	-6.74%
Bulbs and Flowers	386	428	+10.88%
Other	2634	2571	-2.39
Fallow	12886	17907	+38.96%

Mean Temperature

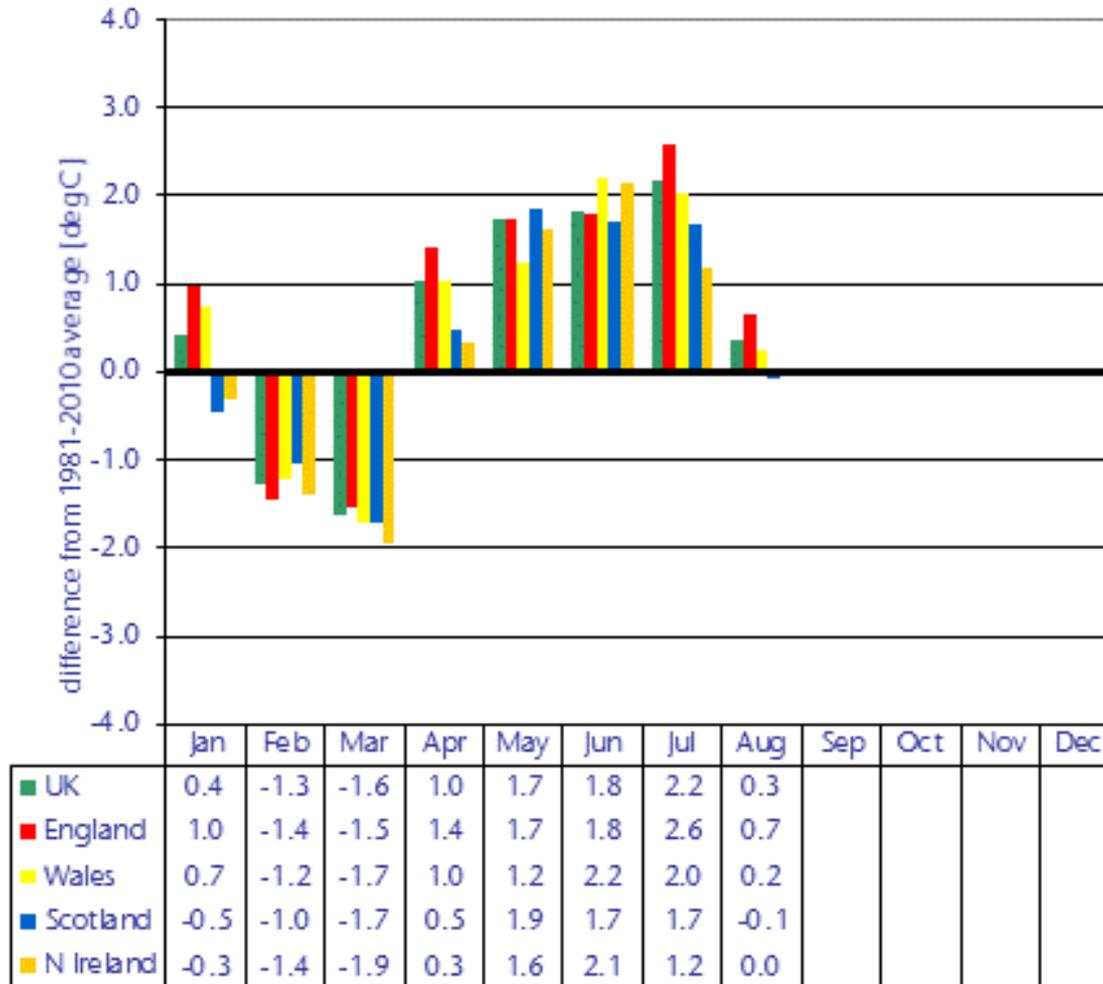


Rainfall



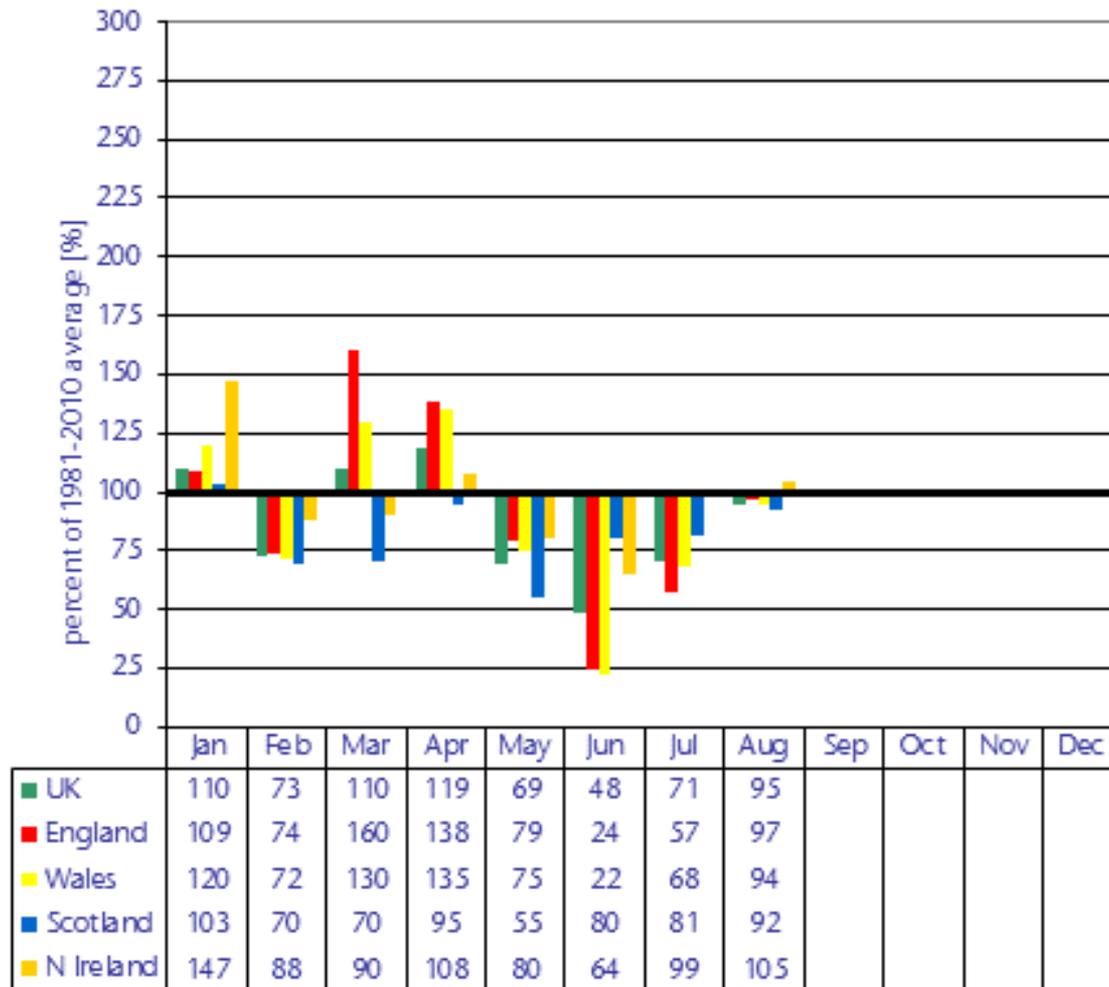
2018 Mean Temperature

Mean temperatures (1981-2010) anomalies for 2018



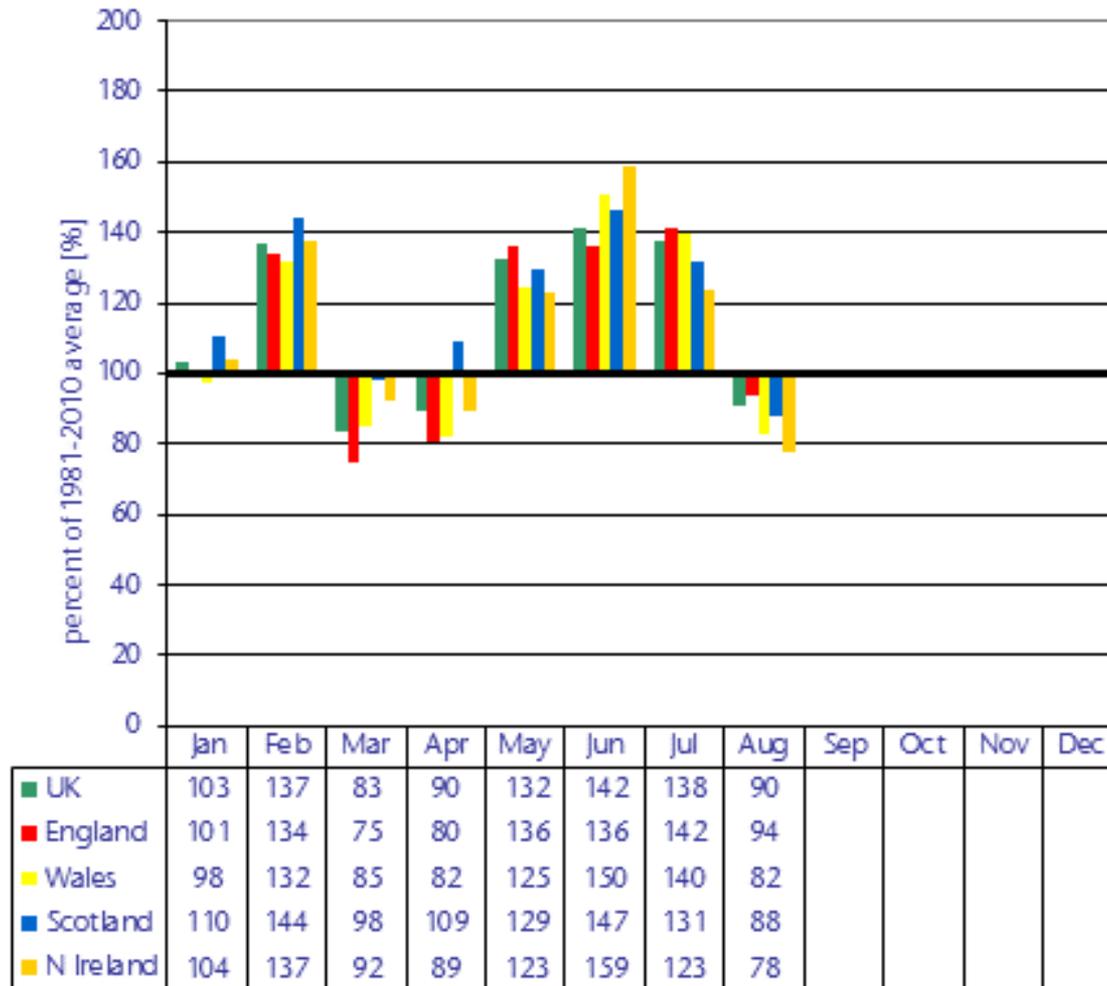
2018 Rainfall

Rainfall (1981-2010) anomalies for 2018



2018 Sunshine

Sunshine (1981-2010) anomalies for 2018



What did this mean for arable farmers?



- Slow Spring
- 3 crop rule for EFA relaxed
- Variable emergence/growth
- Low disease pressure

A game of two halves!



What did this mean for arable farmers?

- Early Harvest
- Varied harvest results
 - Means area variable yields generally below average
 - Central/Northern area average to above average
 - Generally better than was expected
 - Some horror stories



What does this mean for arable farmers?



- Some farms recording record yields of wheat
- Low drying costs
- Good quality and specific weight
- Poor straw yields

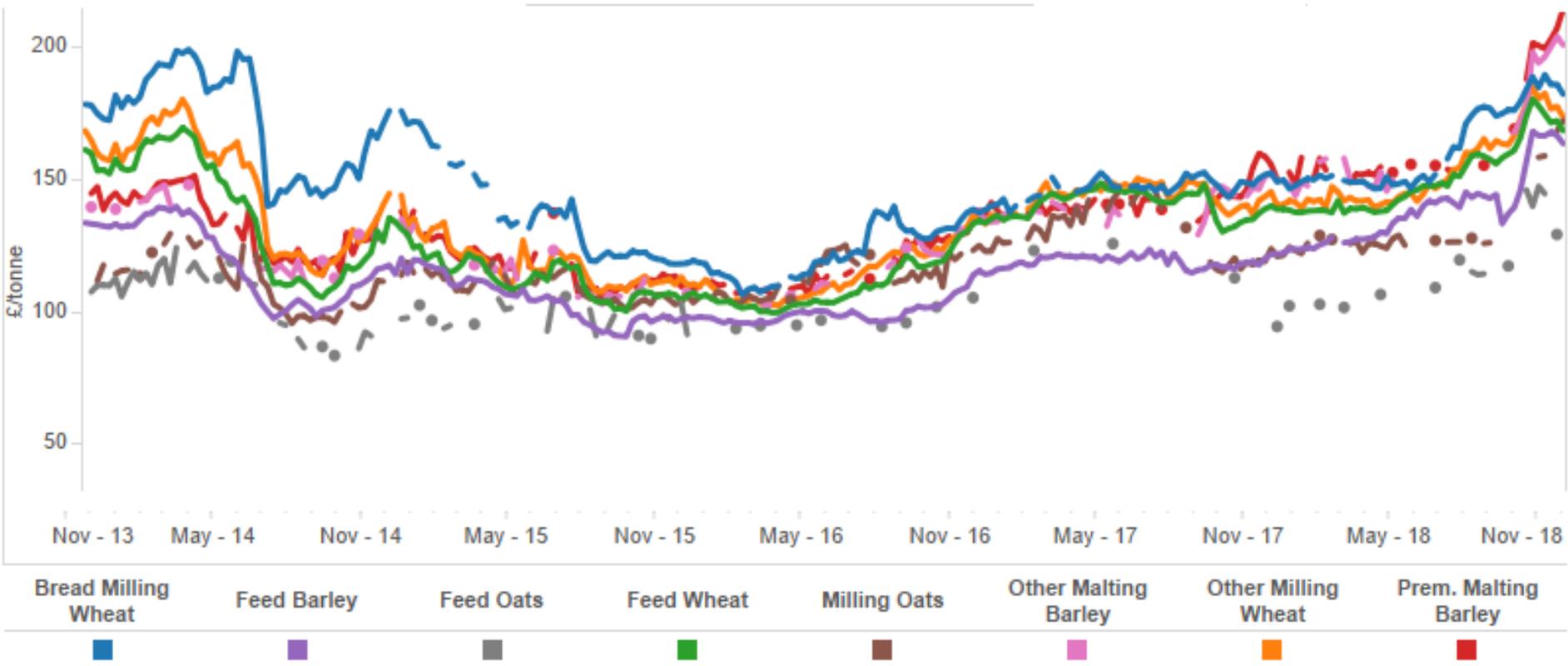
What did this mean for arable farmers?

Current United Kingdom £/Tonne

1/2/2014 12:00:00 AM to 9/13/2018 12:00:00 AM

Current

United Kingdom





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