

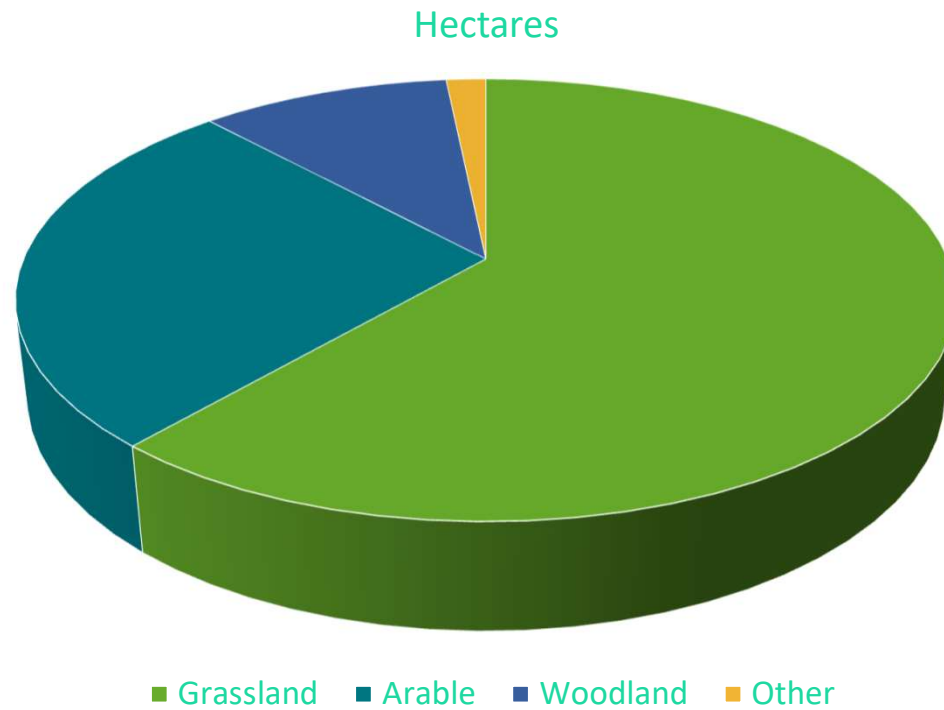


Arable Sector Update

David Ross, Regional Development Manager

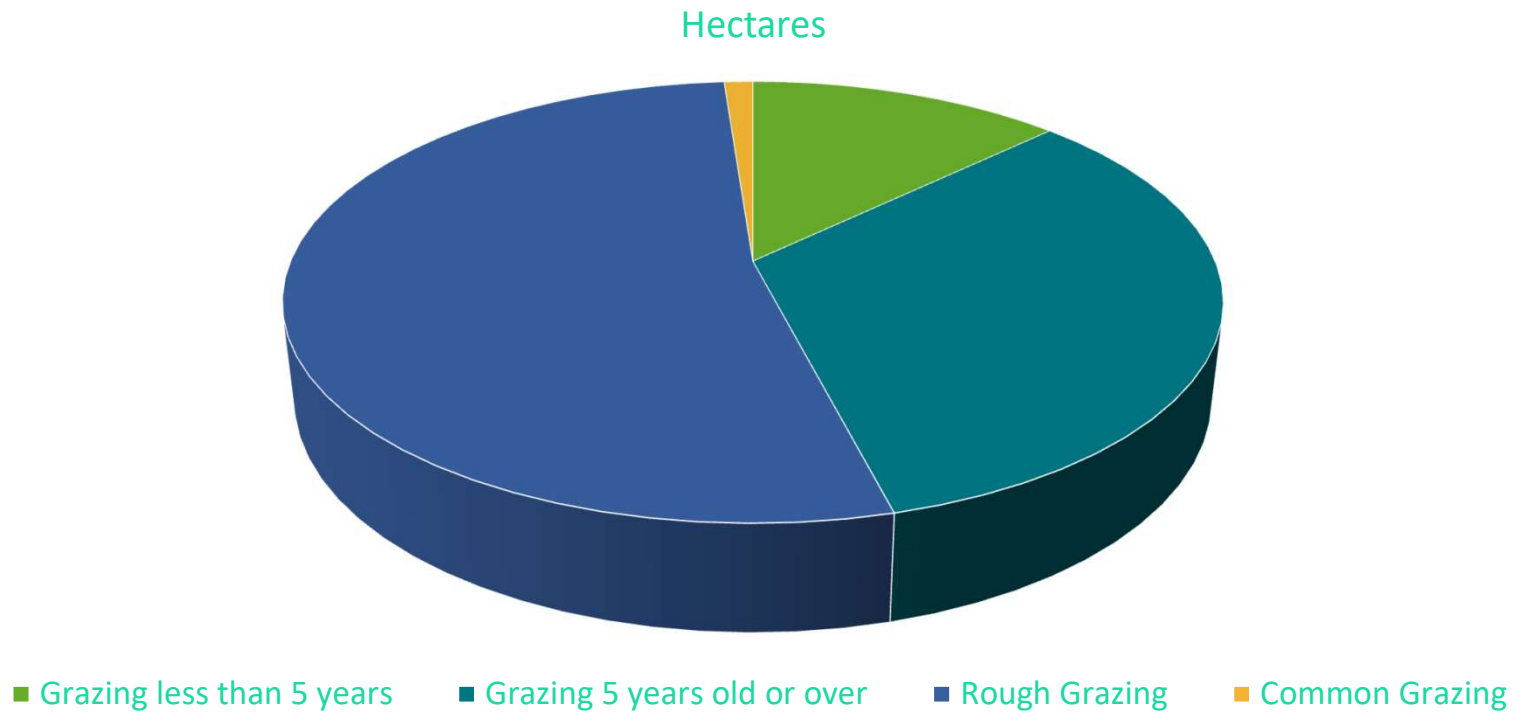
North East Land Use

(Source: Economic Report on Scottish Agriculture 2019)



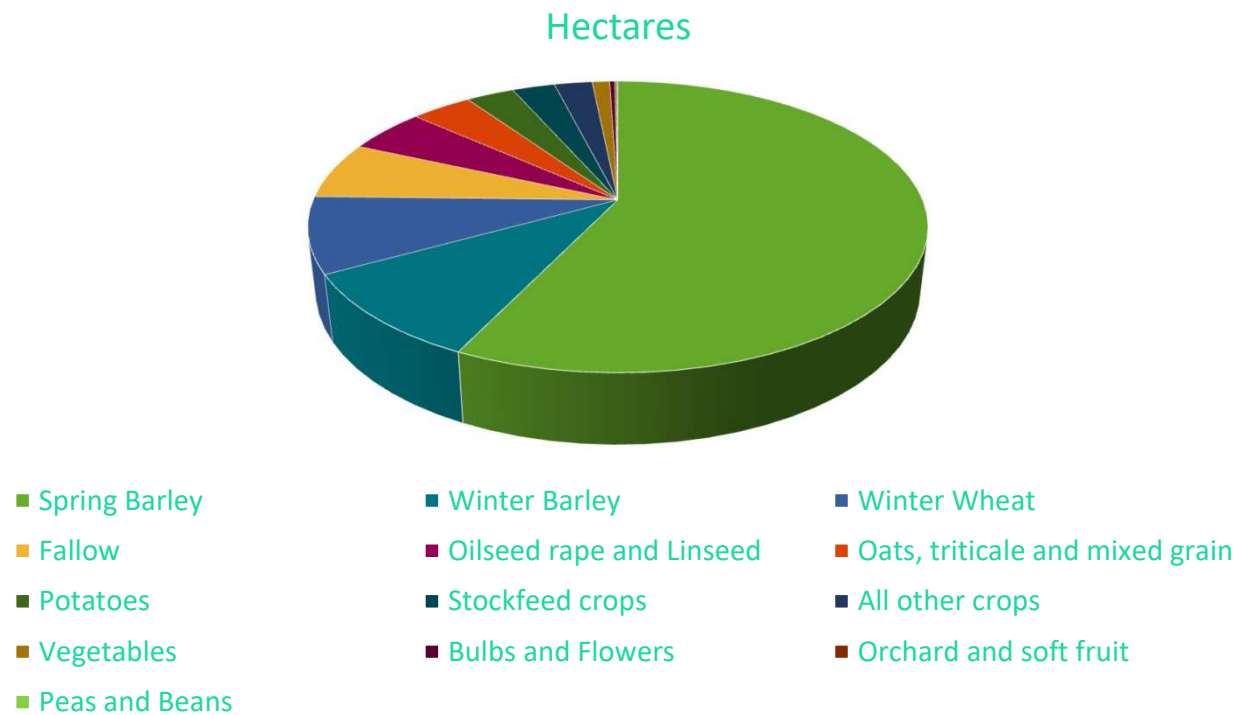
Grassland Areas

(Source: Economic Report on Scottish Agriculture 2019)



Cropping areas

(Source: Economic Report on Scottish Agriculture 2019)



Changes since 2016

(Source: Economic Report on Scottish Agriculture 2019)

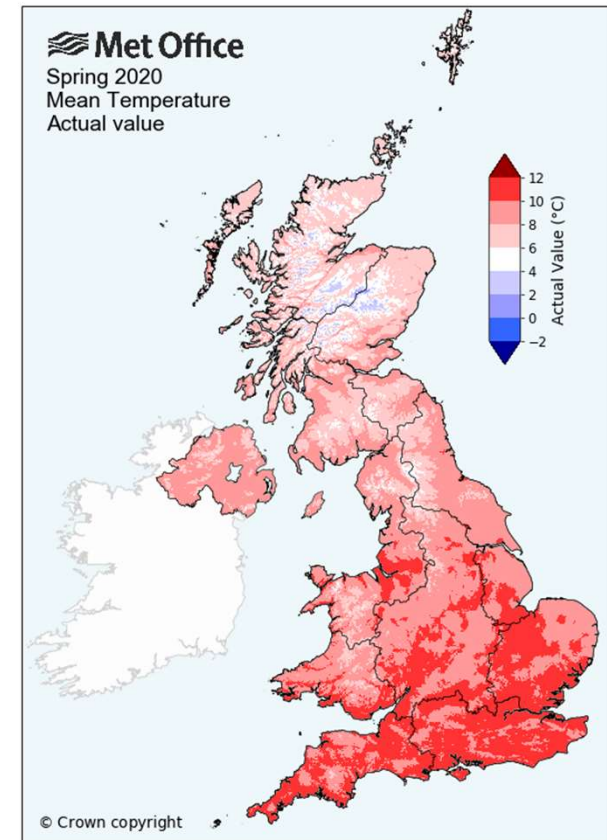
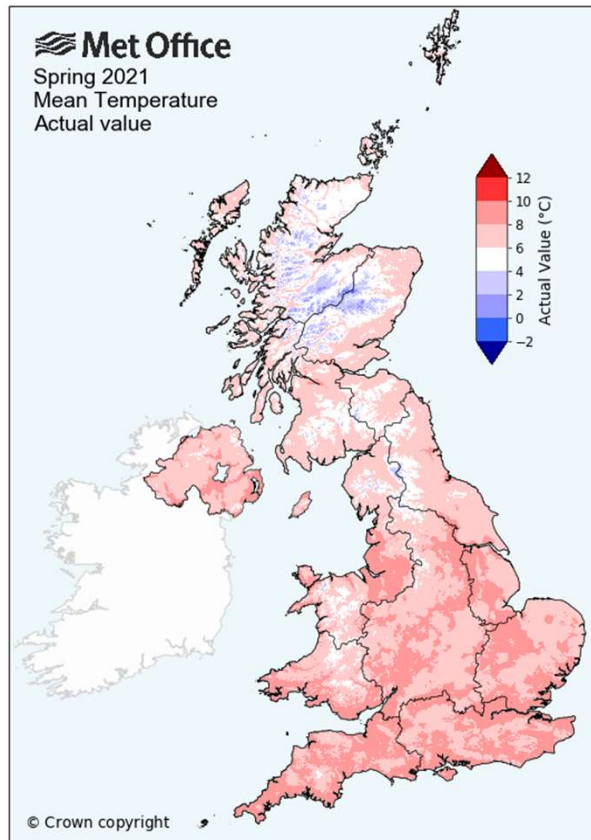
Crop	2016	2019	Percentage change
Wheat	15,554	15,575	+0.1%
Winter Barley	17,897	18,076	+1.0%
Spring Barley	101,241	105,763	+4.5%
Oats, triticale and mixed grains	6,809	7,015	+3.0%
Oilseed rape and linseed	9,302	9,081	-2.4%
Potatoes	5,529	5,557	+0.5%
Peas and beans	270	183	-32.2%
Stockfeed crops	4,778	4,904	+2.6%
Vegetables	2,257	2,013	-10.8%
Orchard and Soft Fruit	166	199	+19.9%
Bulbs and Flowers	428	564	+31.8%
Other Crops	2,571	4,366	+69.8%
Fallow	17,097	11,671	-31.7%

Changes since 2014

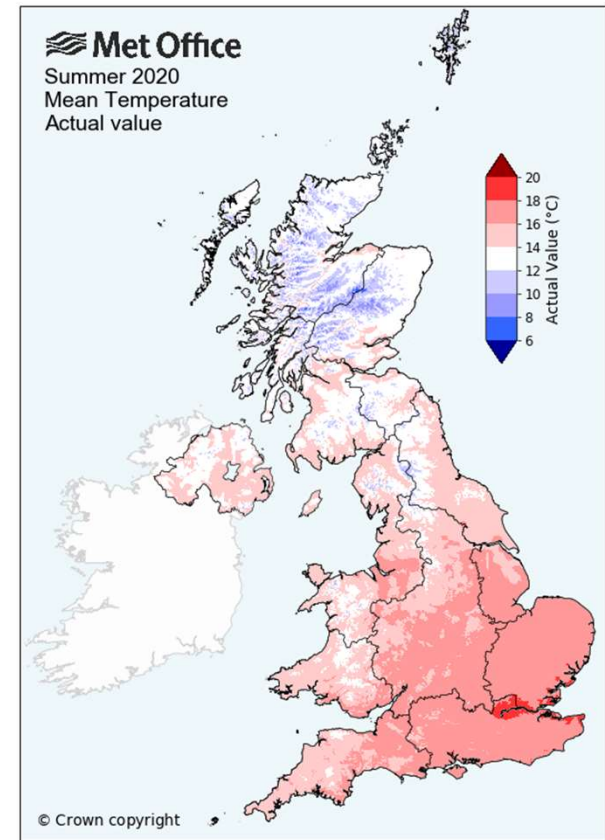
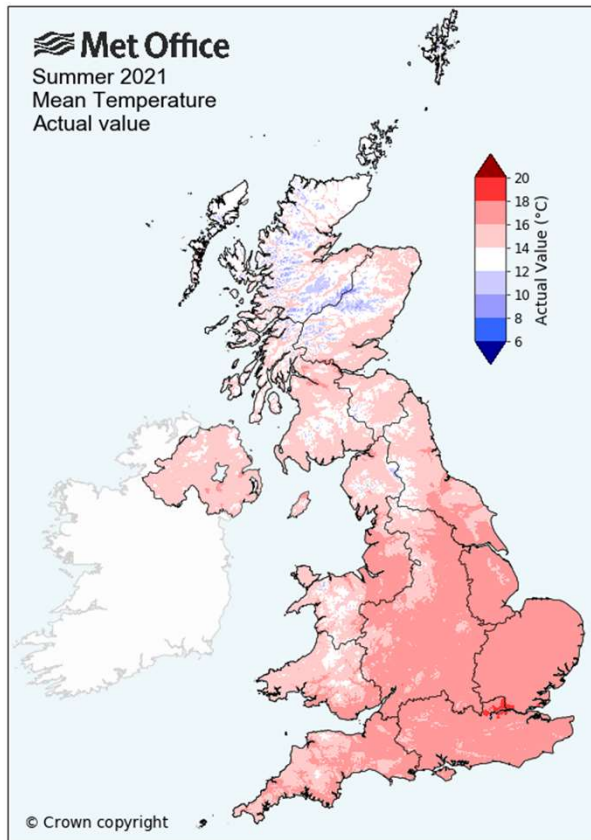
(Source: Economic Report on Scottish Agriculture 2019)

Crop	2014	2019	Percentage change
Wheat	15,936	15,575	-2.3%
Winter Barley	21,100	18,076	-14.3%
Spring Barley	106,342	105,763	-0.5%
Oats, triticale and mixed grains	5,391	7,015	+30%
Oilseed rape and linseed	10,883	9,081	-16.6%
Potatoes	5,298	5,557	-4.9%
Peas and beans	544	183	-66.6%
Stockfeed crops	4,362	4,904	+12.0%
Vegetables	2,057	2,013	-2.1%
Orchard and Soft Fruit	178	199	+11.8%
Bulbs and Flowers	386	564	+46.0%
Other Crops	2,634	4,366	+65.7%
Fallow	12,886	11,671	-9.4%

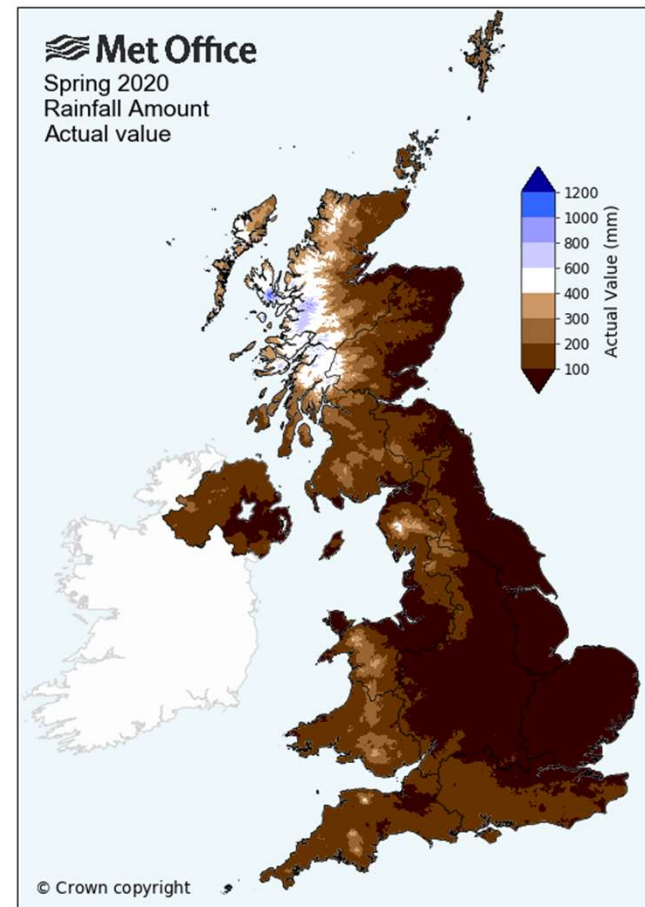
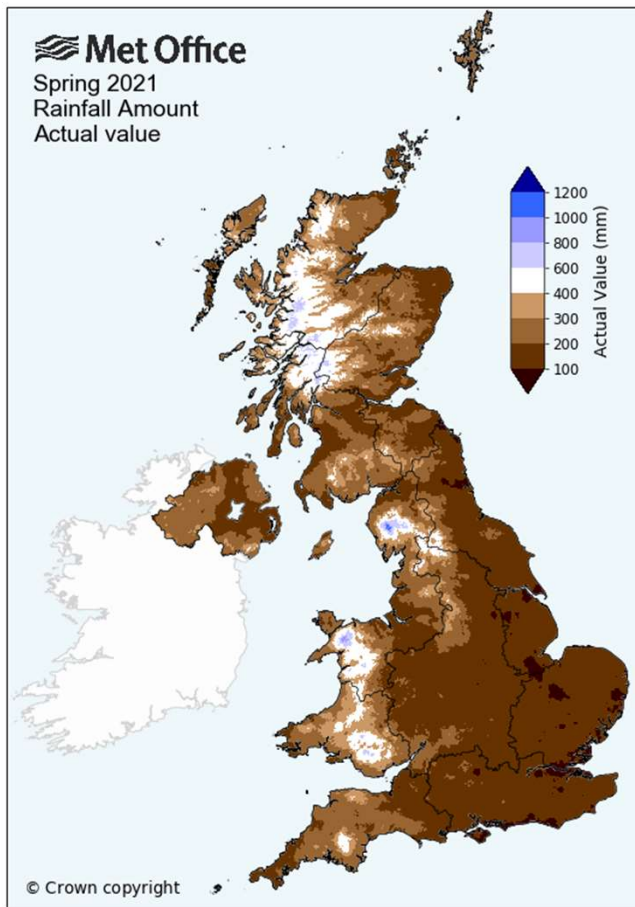
Mean Temperature – Spring 21



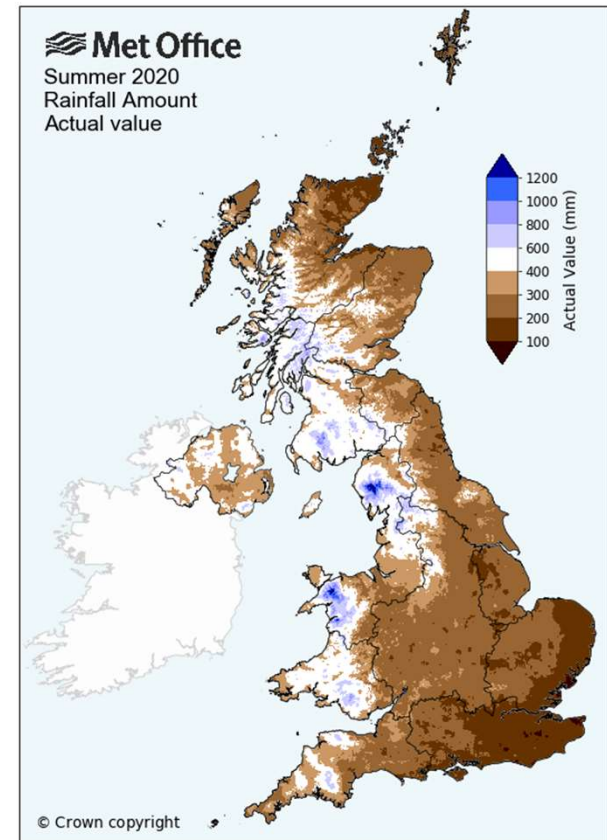
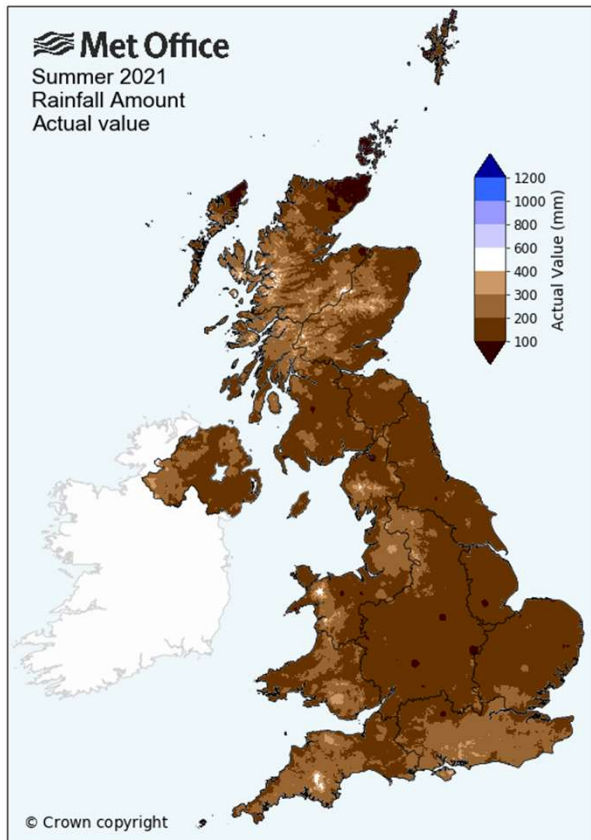
Mean Temperature – Summer 21



Rainfall – Spring 21



Rainfall – Summer 21





What did this mean for arable farmers?

- Colder drier early spring – very cold spell in April
- Very wet in early May
- Variable emergence/slow growth
- Generally lower disease pressure in the spring which increased with wet weather in summer
- Winter crops looked well
- Spring crops variable



What did this mean for arable farmers?

- Prolonged harvest in some areas
- Varied harvest results
 - Winter cereals did average or above
 - WOSR about average
 - Spring crops were variable depending on area but generally lower than previous two years (exceptional)
 - Moisture levels were good
 - Rejection levels variable for skinning and germination
 - Low N year in malting barley
 - Straw yield average

Current market

(Source AHDB)



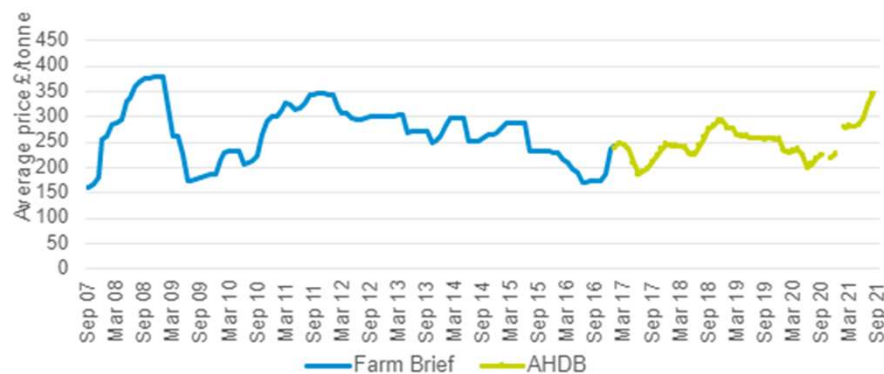
Futures market

(Source AHDB)

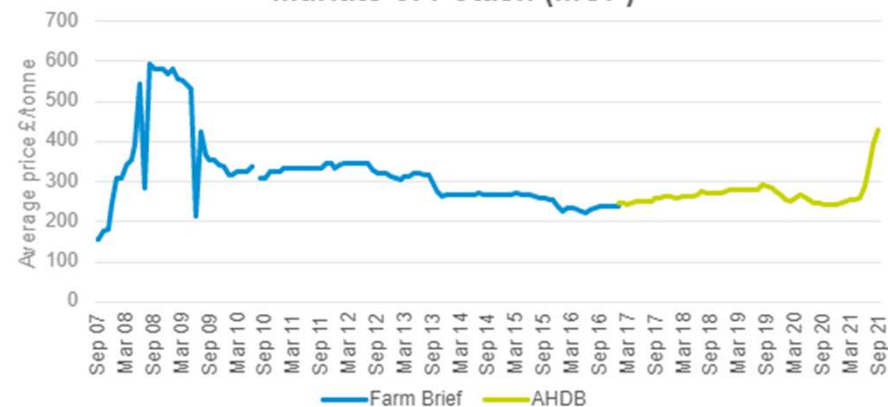
Future Commodity	London Wheat	
Contract Month	Prices	+/-
2021 11 Nov	225.45	2.35
2022 01 Jan	226.25	2.35
2022 03 Mar	230.15	2.35
2022 05 May	233.50	2.35
2022 07 Jul	221.90	1.85
2022 11 Nov	205.00	1.50
2023 01 Jan	205.60	1.50
2023 03 Mar	205.65	1.50
2023 05 May	206.00	1.50
2023 11 Nov	189.00	1.50

Input prices (Source AHDB)

Ammonium Nitrate – UK produced (34.5% N)



Muriate of Potash (MOP)



Triple Super Phosphate (TSP)





What affect will it have on the 2022 harvest?

Approx 60% cover for fert on arable farms

Approx 30% cover for fert on the grassland farms

£20-30 per ton increase on cost of production

Prices have risen so should compensate

Will growers have the money to buy the fert?



So what's new in arable?

Precision farming widely adopted

Soil health becoming more important

Carbon, organic matter, emissions widely discussed

Regenerative agriculture principles being adopted



Regenerative agriculture principles being adopted

- Less soil disturbance
- More plant diversity
- Living roots as much as possible
- Keep the soil covered at all times
- Introduce livestock

