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FARM BUSINESS SURVEY

Horticulture in England



Farm Business Survey

2022/23

Horticulture Production in England

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SUMMARY

Section 1

An overview of the horticultural industry in the United Kingdom (UK) using external data, including government published statistics and information from the press.

The report illustrates the importance of horticulture to UK agriculture output, the composition of its sectors and highlights historical and current trends in the output, prices and the areas used for crop production. The review also includes price indices for key products and inputs. The numbers that appear in square brackets relate to the sources of information and these references are fully listed on Page 44.

Highlights:

- In 2022, the output from horticulture was £4,298 million, 12% of total agricultural output [1]
- Vegetable production remains the largest horticultural sector, in terms of both land use and output, accounting for 41% of total UK horticultural output and 72% of total productive outdoor horticultural area in 2022 [1,2]
- In 2022, the UK was 40% self-sufficient in all vegetables, 21% in all fruit and 51% in all ornamentals, in terms of value [1,2]
- The index of producer prices showed some wide variability between 2021 and 2022 with indices for fresh fruit down two points and fresh vegetables up 12 points [3]
- The index of purchase prices saw fuel for heating increase, from 105 in 2021 to 173 in 2022, along with fertilisers & soil improvers from 146 to 298, while crop protection increased from 101 to 112 [4]

Section 2

A review of the financial results derived from the Farm Business Survey (FBS) for the 2022/23 financial year.

The stratification of the FBS horticulture sample is explained and key trends are shown for the businesses included, both as a whole, and for the four main groups of Glass, Fruit, Hardy nursery stock (HNS) and Other horticulture. The results for each group are presented in tables reporting on output, costs and Farm Business Income (FBI) at a business level, per hectare and per £100 of gross output basis.

Highlights:

- The number of FBS eligible horticultural businesses in 2022/23 was 2,222, while the total FBS sample was 76 businesses, representing 3.4% of the national population of eligible horticultural businesses
- Profitability for all horticultural businesses, as measured by Farm Business Income (FBI), increased by 58%, to an average of £95,618 per business in 2022/23
- All four horticultural groups, Specialist glass, Specialist fruit, Specialist hardy nursery stock and Other horticulture businesses experienced an increase in profitability, albeit at different levels

SECTION 1: THE HORTICULTURAL SECTOR

An overview of the horticultural industry in the United Kingdom (UK) using external data, including government published statistics and information from the press. The numbers that appear in square brackets relate to the sources of information and these references are fully listed on Page 44.

1.1 *The contribution of horticulture to UK agricultural output*

- Total agricultural output in the UK in 2022 was £35,943 million, up 18% from the previous year [1]
- Total horticultural output in the UK in 2022 was £4,298 million, contributing 12% to total agricultural output [1]
- Total horticultural output increased by £161 million between 2021 and 2022, up by 4% [1]
- Average horticultural output in the ten-year period 2013 to 2022 was £3,604 million, an increase of £475 million (15%) compared with the previous 2003 to 2012 period average [1]

1.2 *Historic changes in the composition of the main sectors of horticulture*

- Horticulture can be sub-divided into its three main sectors of fruit, vegetables and ornamentals
- The area used by each sector has varied over the past thirty years, however, during the past decade from 2013 to 2022 the vegetable sector accounted on average for the largest proportion of land use (72%), followed by fruit (21%) and ornamentals (7%) [1]
- The total area of land utilised for horticultural production since 1993 averaged 172,177 ha; from a peak of 213,648 ha in 1986, to a low of 151,752 ha in 2022. The total area decreased by 6% from 161,096 to 151,752 ha in 2022 [1]
- Output has also varied over the past thirty years, which on average has seen the vegetable sector as the greatest contributor (45%), followed by ornamentals (36%) and fruit (18%) [1]
- In 2022 actual output for the sectors was [1]:

○ Vegetables	41%		41% }
○ Ornamentals	36%	compared to	38% }
○ Fruit	23%		22% }
- In value terms, horticultural output in 2022, (compared with 2021) was [1]:

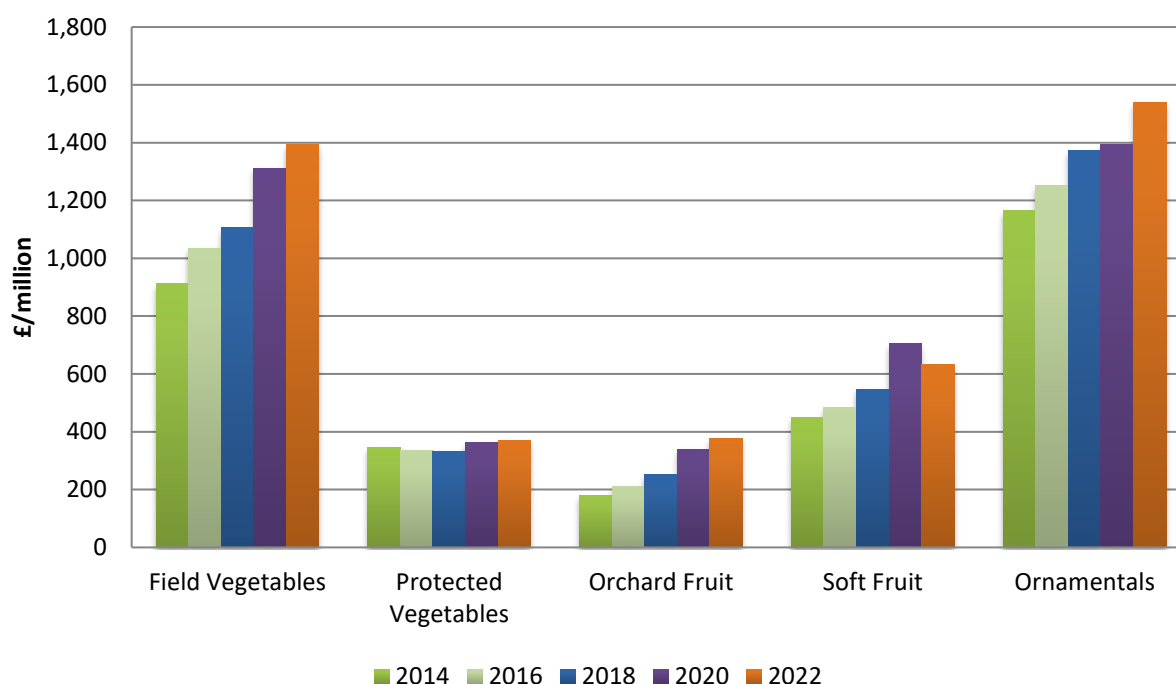
○ £1,770 million for vegetables	(up 5.1% from £1,685 million)
○ £1,538 million for ornamentals	(down 1.5% from £1,562 million)
○ £989 million for fruit	(up 11.1% from £890 million)

1.3 *Horticultural production in the past decade (in current terms)*

- The value of total annual horticultural production in the UK has averaged £3,621 million in the decade since 2013 [1]
- In this decade, production started at a low of £3,119 million in 2013, dipping to £3,054 million in 2014, and increased to a peak of £4,314 million in 2022 [1]
- Between 2013 and 2022, total horticultural production grew in value by 38% with the different sectors showing a wide variation in growth rates as noted below [1]:

○ Vegetables	from £1,335 million to £1,766 million, up 32%
○ Fruit	from £593 million to £1,010 million, up 70%
○ Ornamentals	from £1,191 million to £1,538 million, up 29% [1]

Figure 1.1 Value of horticultural production (current prices: £m) [1]



Note: The current prices have not been adjusted for inflation

Table 1.1 Area of outdoor and protected crops in the UK (ha) [1,2]

	2014	2016	2018	2020	2022
Glasshouse crops (excl. protected vegetables)	1,733	1,919	2,065	2,037	1,873
Protected Vegetables	861	829	802	874	709
Outdoor Non-Edibles	11,996	11,508	11,673	11,455	10,057
Field Vegetables	116,112	112,554	115,938	118,131	106,671
Orchard Fruit	23,437	25,144	23,930	23,090	22,281
Soft Fruit	9,376	9,991	10,562	10,549	10,160

Note: The area of crops in table 1.1 relate to the total area, which for some crops will be for more than one crop harvested from the same area of land in the same cropping year (multiple cropping).

- The area of glasshouse crops (excluding protected vegetables) increased by 8% from 2014 but fell by 8% between 2020 and 2022 [1,2]
- The area of protected vegetables decreased by 18% from 2014 [1,2]
- The area of outdoor ornamentals decreased by 16% from 2014 falling by 12% between 2020 and 2022 [1,2]
- The area of field vegetables decreased by 8% from 2014 [1,2]
- The area of orchard fruit decreased by 5% from 2014 [1,2]
- The area of soft fruit has grown by 8% from 2014, but fell by 4% between 2020 and 2022 [1,2]

1.4 The horticultural sector in 2022

- The total value of horticultural output in 2022 amounted to £4,276 million [1]
- Field scale vegetables comprised the largest share of total output at 33% [1]
- Mushrooms accounted for the lowest share of the total output at 3% [1]

Figure 1.2 Value of horticultural produce in 2022 by proportion of total output [1]

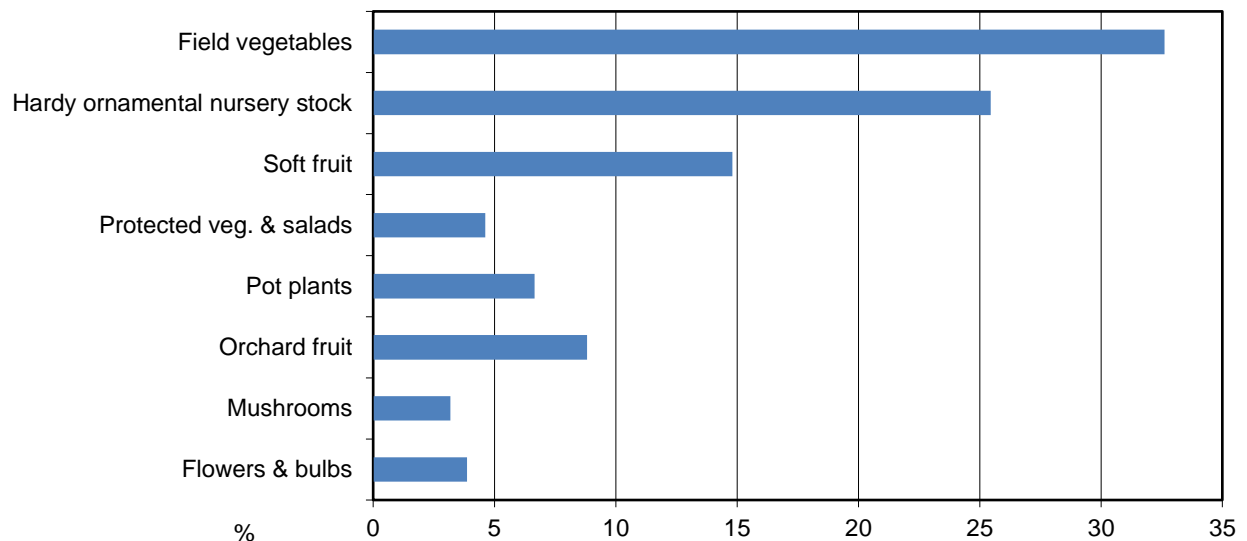
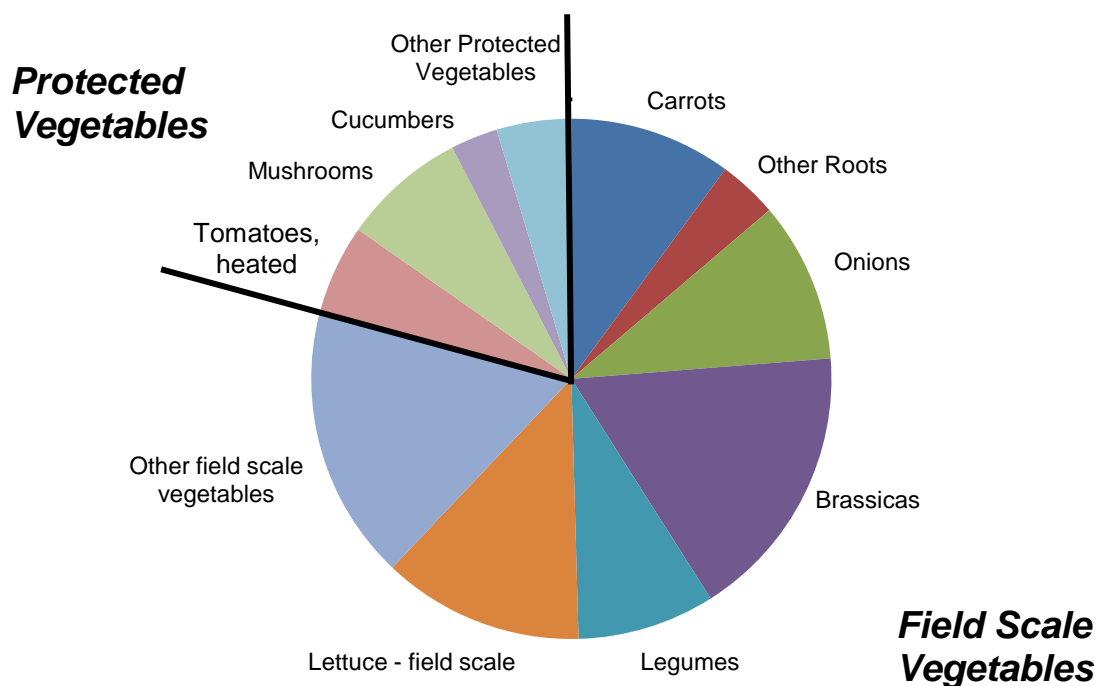
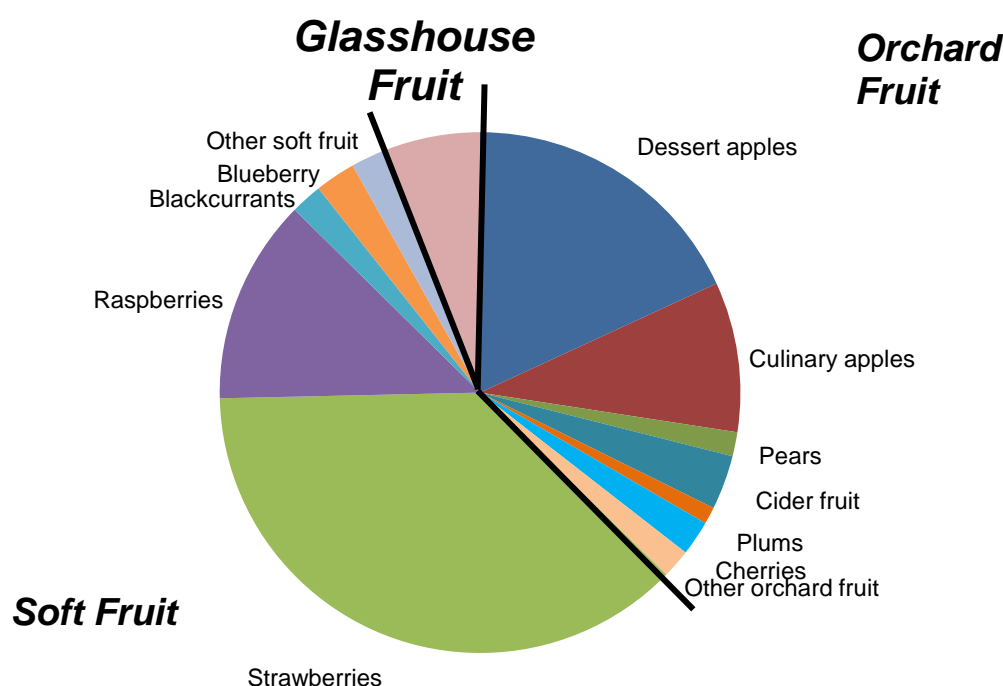


Figure 1.3 Composition of vegetable output in 2022 [2]



- Field scale vegetable production account for 79% of total value of vegetables produced, including brassicas, carrots, legumes, parsnips, turnips, swede, courgette, asparagus, watercress, leeks, lettuce, rhubarb, celery and onions (dry bulb and green) [2]
- Brassicas and Other field scale vegetables account for the largest single proportion by category of the total vegetable value, both being at 17% [2]
- Protected vegetables, including crops grown in both heated and cold glasshouses and polythene tunnels, account for 21% of total vegetable value [2]
- Mushrooms are the highest contributing protected vegetables to the total vegetable production value, at 8%, heated tomatoes following at 6% [2]

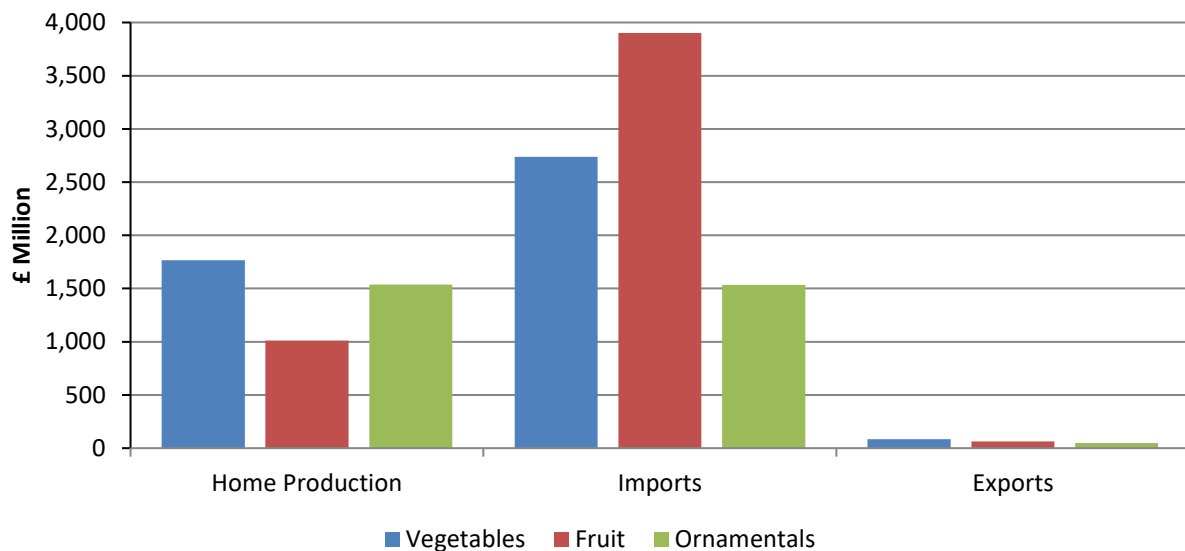
Figure 1.4 Composition of fruit output in 2022 [2]



- Total fruit output by value was £1,010 million, with the production of field grown soft fruit generating £574 million (57%), orchard fruit £377 million (37%) and glasshouse fruit £59 million (6%) [2]
- Strawberry production contributed the greatest share (66%) of all soft fruit production at £377 million, 37% of total fruit production with raspberries the next largest sector at 13% [2]
- Dessert apples accounted for 49% of orchard fruit output (£183 million) in 2022, and was 18% of total fruit production [2]

1.5 Imports and exports of horticultural products

Figure 1.5 Value of vegetables, fruit and ornamentals 2022 (£m) [2]



Vegetables

- The UK was 40% self-sufficient in all vegetables in terms of value in 2022, averaging 39% during the decade 2013 and 2022 [2]
- Between 2021 and 2022 the value of imports increased by 15% to £2,737 million, whilst the value of exports increased by 17% to £85 million [2]
- The value of home-produced vegetables in actual prices increased by 34% between 2013 and 2022, an increase of £444 million [2]

Fruit

- In 2022, in terms of value, the UK was 21% self-sufficient in fruit, 2% above the average over the past decade, since 2013 [2]
- Between 2021 and 2022 fruit exports increased by 2% to £64 million, and the value of imports rose by 5% to £3,903 million [2]
- The value of home production in actual prices increased between 2013 and 2022 by 75%, with an overall increase of £434 million in the last decade [2]

Ornamentals

- In terms of value, self-sufficiency for ornamentals in 2022 was 51%, averaging 54% since 2013 [2]
- Between 2021 and 2022 the value of imports increased to £1,534 million, up 22%, while the value of exports dropped by 12% to £49 million [2]
- The value of home production in actual prices increased between 2013 and 2022 by 29% to £1,538 million [2]

1.6 Wholesale prices (actual): recent trends

- The fruit and vegetable sectors have seen significant wholesale price fluctuations between 2013 and 2022. As shown in Figure 1.6, both raspberry and strawberry prices fell by approximately 15% between 2021 and 2022 [3]
- Top fruits shown in Figure 1.7 have seen small price increases in the 2013 to 2022 period. In the last ten years dessert apple prices rose from a low of 60 p/kg in 2014 to a high of 112 p/kg in 2021, while in 2022 they fell back 3% to 109 p/kg. Plums & gages have seen the largest increase, from 101 p/kg in 2013 to 263 p/kg in 2021. Although in 2022 they fell by 13% to 228 p/kg [3]
- Brassicas, namely brussels sprouts, cabbage and calabrese, have shown considerable inter-year variability, with an average price fluctuation between lowest and highest prices of 238% during the 2013 to 2022 period [3]
- Vegetables excluding brassicas, namely carrots and parsnips, also showed inter-year variability, with an average price change of 48%, between the highest and lowest point in the last ten years [3]
- Salad crops, i.e. lettuce, tomatoes and cucumbers, followed a similar trend in the last ten year period, with an improvement in price between 2021 and 2022 [3]

Figure 1.6 Average soft fruit wholesale actual prices [3]

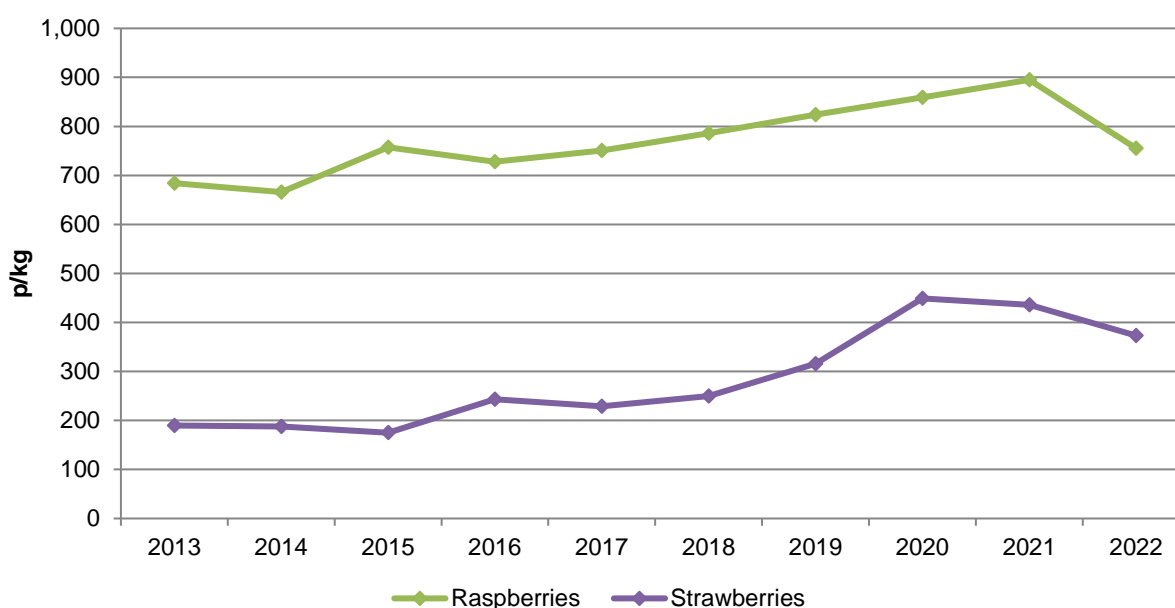


Figure 1.7 Average top fruit wholesale actual prices [3]

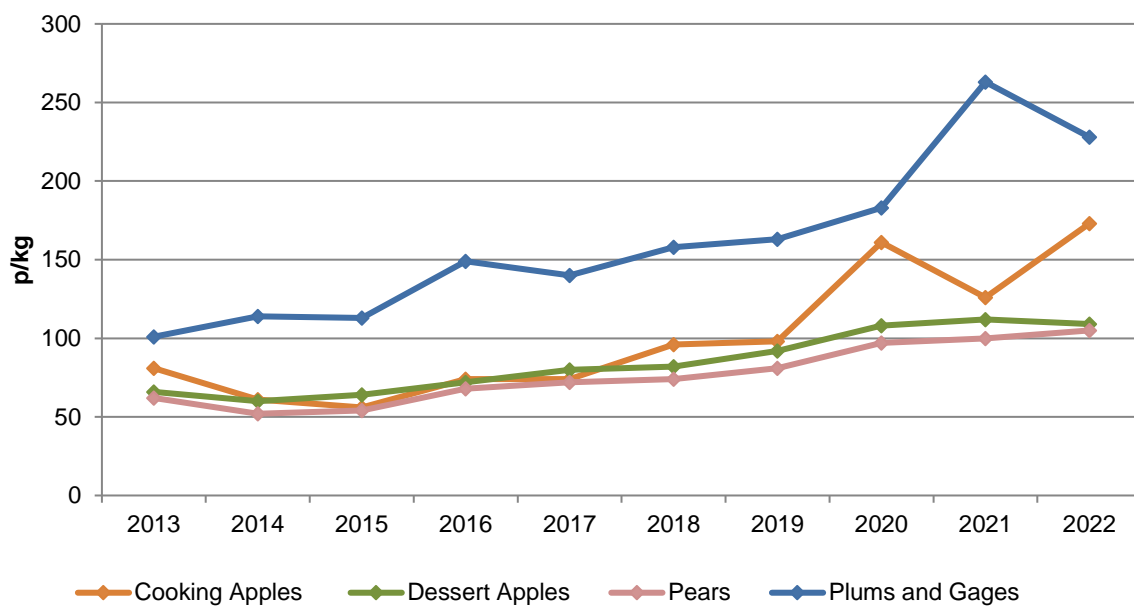
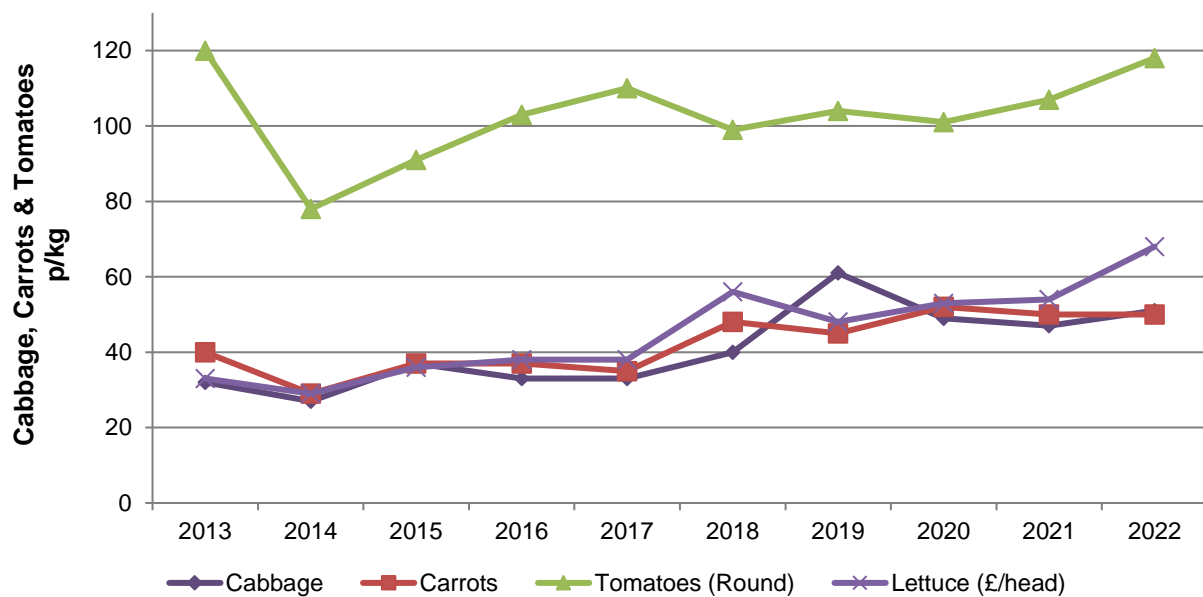


Figure 1.8 Average vegetable wholesale actual prices [3]



1.7 Price Indices in the UK

Table 1.2 Index of producer prices (Index: 2020 =100) [4]

	2018	2019	2020	2021	2022
Dessert apples	84.6	87.5	100.0	104.0	107.3
Dessert pears	80.8	81.7	100.0	102.9	94.5
Strawberries	62.4	72.0	100.0	88.1	81.9
All fresh fruit	71.7	78.9	100.0	95.7	94.0
Lettuce	97.2	91.1	100.0	105.9	122.4
Onions	91.5	115.1	100.0	104.7	114.0
Cabbage	87.8	99.5	100.0	97.9	118.5
All fresh vegetables	91.9	98.4	100.0	106.6	118.4
Flowers & plants	101.6	101.9	100.0	106.8	110.5

- Data based on a calendar year. These periods most closely resemble the FBS data
- Output indices reflect the price farmers and growers receive for their produce at farm gate price. Because of the fluctuating value of inputs and outputs over a longer period, some years are often reset, so future movements can be compared against a baseline
- The index prices for 2020 are all set to 100.0 to show the relative change in prices
- Dessert apples show an increase of 3 points from the 2021 to 2022 indices, and dessert pears, strawberries and all fresh fruits have all seen decreases of 8 points, 6 points and 2 points respectively [4]
- Vegetables show increases from 2021 to 2022 indices; with lettuce rising by 16 points and onions rising by 9 points, cabbages increased the most by 21 points, and all fresh vegetables increased by 12 points [4]
- Flowers & plants have increased by 4 points to 111 [4]

Table 1.3 Index of purchase prices (index 2020 =100) [4,5]

	2018	2019	2020	2021	2022
Current Inputs					
Seeds	98.6	98.2	100.0	104.4	109.3
Fertilisers & soil improvers	111.9	115.2	100.0	145.8	297.9
Plant protection	92.7	91.8	100.0	100.9	111.5
Fuel for heating	101.0	104.8	100.0	104.7	172.5
Full-Time hired labour*	96.8	100.0	100.0	106.1	111.2
Capital inputs					
Machinery & other equipment	98.6	100.0	100.0	100.0	122.3
Buildings	97.4	99.7	100.0	112.6	133.7

* Farm Business Survey figures

- Input indices reflect the prices farmers and growers pay for goods and services, either used in the production process or investments required for production
- As in Table 1.2, the 2020 figures are set to a baseline of 100.0 to show the change in input prices for the following three years
- The index of purchase prices has shown an increase of 152 points for fertilisers and 68 points for heating fuel between 2021 and 2022 [4]
- Full-time hired labour costs for Agricultural & related trades have grown steadily year on year, increasing by 14 points since 2018. It should be noted that within the Horticultural industry there is a strong reliance on casual labour which is not included in this index [5]
- Machinery & other equipment costs showed a small increase of one point from 2018 to 2019 and then increased by 23 points in 2022 [4]
- Buildings inputs have also shown a larger increase of 21 points compared to the previous year's 13 point increase [4]

SECTION 2: FINANCIAL RESULTS FOR HORTICULTURE IN ENGLAND

2.1 Introduction to the data

The following series of tables are drawn from a sample of farmers and growers who participate in the Farm Business Survey (FBS) in England and whose businesses are classified under one of the four main Defra horticultural type groups. These four type groups of Specialist glass, Specialist fruit, Specialist hardy nursery stock and Other horticulture are defined below.

For the purposes of the Defra classification, farms growing field scale vegetables and arable crops are classified as General Cropping farms, and so their results are not included in these tables, although farms growing field scale vegetables without arable crops are recorded in the 'Other horticulture' typology group.

The data in this report were compiled from the 2021/22 and 2022/23 FBS and can be accessed at:

- www.farmbusinesssurvey.co.uk and at
- <https://www.gov.uk/government/collections/farm-business-survey>

2.2 Definition of horticultural type groups

Horticultural businesses are defined as businesses where horticultural crops or permanent crops including fruit, either alone or in combination, account for over two thirds of total standard output.

Specialist glass

- Market garden vegetables and flowers under glass (either alone or in combination) accounting for more than two thirds of the total standard output of the business, including walk-through polythene tunnels
- The specialist glass businesses have been further sub-divided into those businesses with mainly edible crops (more than 50% of crop output from edible crops) and those with mainly ornamental crops (more than 50% of crop output from ornamental crops)
- In addition to this, the specialist glass group has been sub-divided by the level of intensity of glasshouse production, showing '90% or more' of total crop output produced from protected crops

The results from these businesses are found in the following tables:-

- Table 2.4 All specialist glass businesses
- Table 2.5 Specialist glass businesses, mainly edible crops
- Table 2.6 Specialist glass, mainly ornamental crops
- Table 2.7 Specialist glass (90% or more of crop output from glasshouse production), mainly edible crops

Specialist fruit

- Fruit (top and soft fruit) accounting for more than two thirds of total standard output of the business
- The specialist fruit group has three sub-groups of mainly top fruit businesses; mainly top fruit and top fruit excluding cider apples

The results from these businesses are found in the following tables:-

- Table 2.8 All specialist fruit businesses
- Table 2.9 Specialist fruit businesses, mainly top fruit
- Table 2.10 Specialist fruit businesses, mainly top fruit-excluding cider

Specialist hardy nursery stock

- Hardy nursery stock (HNS) accounting for more than two thirds of total standard output of the business

The results from these businesses are found in the following tables:-

- Table 2.11 All specialist HNS businesses

Other horticulture

- Businesses in which none of the above categories accounts for more than two thirds of standard output
- The 'other horticulture' group has one sub-group of mainly outdoor vegetable growers

The results from these businesses are found in the following tables:-

- Table 2.12 All other horticulture businesses
- Table 2.13 Mainly outdoor vegetables – 50% or more of crop output derived from outdoor vegetables

2.3 The Sample

The Farm Business Survey (FBS) covers businesses with a Standard Output (SO) of 25,000 euros and above, and so the smallest 'commercial' horticultural businesses by June Survey definition are therefore not eligible for the FBS. SO is representative of the level of output that could be expected on the average farm under "normal" conditions (i.e. no disease outbreaks or adverse weather) and measures the total value of output of any one enterprise – it is calculated on a per head basis for livestock and per hectare basis for crops.

The sample is drawn from a stratified population of seven regions in England by the four main horticultural typologies of Specialist glass, Specialist fruit, Specialist hardy nursery stock and Other horticulture. The weighting of the FBS results is a two-stage process with, firstly, an initial weight being produced and, secondly, this initial weight is then adjusted via a calibration procedure. The weights are based on population data from the June business register and are calculated for each design stratum. The weight when applied to each business represents the number of times that business' data must be replicated in order to 'represent' businesses not selected for the sample, so as to reflect the entire population, and applies to all variables.

The classification to farm type for the June Survey database is based on Standard Output (SO). A minimum size threshold is also used in order to eliminate those businesses which are not deemed to be commercially active. For horticultural crops, the threshold is: 1.0 hectare of orchard, 0.5 hectare of vegetable crops or 0.1 hectare of protected crops.

The number of FBS eligible conventional and organic horticultural businesses in 2022/23 was 2,222, while the total FBS sample for the 2022 cropping year was 76 businesses, representing 3.4% of the national population of eligible horticultural businesses.

Table 2.1 FBS sample compared to eligible* horticultural businesses for 2022

(*Businesses with Standard Output of 25,000 euros and above)

	England Population 2022 June Survey (number of businesses)	FBS Sample 2022 (number of businesses)	FBS sample as a % of population
Specialist Glass	245	11	4.5%
Specialist Fruit	621	33	5.3%
Specialist HNS	563	8	1.4%
Other Horticulture	793	24	3.0%
All Horticulture	2,222	76	3.4%

The 'All Horticulture' group results are based on a sample of 76 businesses and no outliers have been removed from this group. Results for Specialist Glass and Specialist HNS are based on less than 15 businesses; their results should be treated with caution due to these small samples.

It is important to note that all surveys are subject to sampling error as they are not measuring the whole population, the FBS is no exception. It is common practice to publish 95% confidence intervals and error bars alongside any published estimated figures to give the reader an indication of the size of the sampling error. These signify that we are 95% confident that this range contains the true value. For simplicity within these reports, the confidence intervals have not always been published. Readers should be aware that the figures calculated from the FBS data have a level of uncertainty around them and that all figures are estimates. Generally, the smaller the sample size the greater the sampling error and the less confidence we have in the estimates. For details on the FBS confidence intervals, please refer to Defra FBS publications: <https://www.gov.uk/government/statistics/farm-accounts-in-england/survey-details-and-technical-notes--2>

Results for this survey can be accessed at:

<http://farmbusinesssurvey.co.uk> and

<https://www.gov.uk/government/collections/farm-business-survey#farm-accounts-in-england>

2.4 Overview of 2022/23

- The average profitability as measured by Farm Business Income (FBI) increased from £60,625 to £95,618 per business in 2022/23
- All four horticultural groups, Specialist glass, Specialist fruit, Specialist hardy nursery stock and Other horticulture businesses experienced an increase in profitability, albeit at different levels

2.5 Financial results for 2021/22 and 2022/23

- The results in this section are shown for businesses classified according to the Defra classification system, as described in section 2.3 of this report and are shown on a:
 - 'per business', 'per hectare' and 'per £100 of gross output' basis
 - results are based on the productive cropping area of the business
- Average results are shown for the 2021 and 2022 harvest years, together with some premium results for the 2022 harvest year, where the sample size is large enough for publication:
 - The premium results are for the top quartile of businesses, as measured by a ratio of farm business output to farm business costs (including unpaid labour) and are shown on a per hectare basis
 - Weights are used to allocate farms into quartiles, so the number of farms in a quartile will not necessarily be equivalent to a quarter of the sample; this methodology provides for a better representation of the full farm population
- The total fixed costs include imputed items such as labour and rent, to calculate Management & investment income. When benchmarking businesses, these imputed costs are included so that businesses can be compared on an equal basis. However, adjustments are made to these figures to show Farm Business Income, which more closely resembles the actual profit of the business
- The horticultural sector represents a very diverse group of growers, with some operating highly intensive glasshouse operations and others engaged in more extensive top fruit and vegetable production
- Where the data are derived from a sample of less than 15 businesses, there is a lower degree of confidence in the figures

2.6 Specialist Glass [Tables 2.4 to 2.7]

There are four tables reporting on the financial results of specialist glass businesses, it should be noted that data are derived from a very small sample size and thus there is a lower degree of confidence in the figures differentiating between crop types (edible crops vs. ornamentals) and the level of glasshouse production.

- A number of businesses within the specialist glasshouse group have some outdoor crop production; the group has been sub-divided according to the intensity of glasshouse production showing those with 90% or more of crop output derived from glasshouse production (Tables 2.7 and 2.8)
- *Specialist glass, all crops* [Table 2.4]
 - The group includes both heated and unheated glasshouses and polytunnels
 - Average productive cropping area in 2022 was 9.1ha, of which protected production was 3.3ha
 - The sample of 11 specialist glass businesses is split between 6 businesses specialising in edible crops and 5 businesses specialising in ornamental crops

- On a per business basis in 2022, Farm Business Income (FBI) increased by 15% to £96,226. The edible sector had a much-improved year with FBI increasing by 113%, while the ornamental sector experienced a fall in FBI of 266%
- The composition of cropping for these businesses moved slightly towards the ornamental sector, with 66% of crop output derived from the ornamental sector compared with 53% in the previous year
- *Specialist glass, mainly edible crops [Table 2.5]*
 - Profitability for this group, at £196,124 per business, showed an increase of £103,826 compared to the previous year
 - The cropping area rose from 2.9ha to 5.6ha and the glasshouse area increased by 35% between the two years
 - Consequently, profitability per hectare showed just an 8% increase to £35,000 per hectare
- *Specialist glass, mainly ornamental crops [Table 2.6]*
 - In contrast to the edible group, profitability for this group decreased by £196,000 to a negative £122,270 per business
 - Although there was an increase in output there were larger increases in both variable and fixed costs
- *Specialist glass businesses (90% or more crop output from glasshouse production) – Mainly edible crops [Table 2.7]*
 - The data are derived from a very small sample size and thus there is a lower degree of confidence in the figures
 - Tomato production accounted for 77% of all glasshouse output for this sample of businesses in 2022
 - The Gross Margin per hectare increased in 2022 by 29% to £384,806, with an increase on output and a smaller increase in variable costs
 - The cost of glasshouse fuel increased by 160% on a per hectare basis
 - Average Farm Business Income increased from £56,982 to £156,008 per hectare, with a small reduction in overhead costs
 - The unweighted average for an identical sample of businesses produces very similar results to the weighted sample, although this is just comparing farms in the sample and is not representative of the population

2.7 Specialist Fruit [Tables 2.8 to 2.10]

- There are three tables reporting on the financial results for this type group and its sub-groups:
 - Table 2.8 shows the results for all specialist fruit businesses
 - Table 2.9 shows a sub-group of this sample for businesses with over 90% of their total crop output derived from top fruit
 - Tables 2.10 splits this down further to a group excluding cider apple growers
- *Specialist fruit businesses [Table 2.8]*
 - Within the specialist fruit group in 2022, crop output was made up from 85% top fruit, 12% soft fruit and 3% other crops
 - Profitability for this group rose by 101% to £67,264 in 2022/23
 - The average cropping area decreased by 30% in 2022 to 13ha

- 48% of the Gross Output is derived from other non-crop activities such as adding value to the crop by means of on-farm processing of fruit or offering customised pack house services to other growers
- *Mainly top fruit businesses - 90% or more crop output derived from top fruit [Table 2.9]*
 - This group includes businesses that specialise in top fruit production, with 90% or more of their total crop output derived from top fruit
 - In 2022, approximately 80% of crop output was derived from dessert & culinary apples, 6% from cider apples, 4% pears and 5% from plums
 - The average price of dessert apples increased to £817/t and there was also an increase in the average yield to 26.1t/ha
 - The average price of fruit does not reveal the very wide variation with some fruit achieving Grade 1 supermarket prices and less marketable fruit only achieving juicing prices
 - Average Farm Business Income (FBI) was much improved in 2022/23 at £18,204 per business and £1,385 per hectare, both reversing the negative figures seen the previous year
- *Mainly top fruit businesses – 90% or more crop output derived from top fruit, excluding cider apple growers [Table 2.10]*
 - This sub-group of specialist top fruit growers consists of 16 growers in 2022, predominantly growing top fruit for eating
 - The average area for these businesses fell from 14 to 11ha, and average Farm Business Income rose to £1,296/ha

Table 2.2 Top fruit yields, prices and output* - 2021/22 and 2022/23

(*Businesses with Standard Output of 25,000 euros and above)

Top Fruit		2021/22	2022/23
Culinary Apples	tonnes/ha	19.2	25.4
	£/tonne	471	392
	£ output/ha	9,065	9,936
Dessert Apples	tonnes/ha	21.2	26.1
	£/tonne	633	817
	£ output/ha	13,013	20,569

Note: * The areas used when calculating the per hectare figures are field areas (not tree areas) and the fruit tonnage is for all the fruit sold either fresh or for processing and juice

2.8 Specialist Hardy Nursery Stock [Tables 2.11]

As the sample for Specialist HNS was only 8 farms, all results here should be treated with caution. it is also not possible to provide the breakdown of extensive HNS businesses due to disclosure rules.

- *Specialist HNS businesses [Table 2.11]*
 - This group of businesses include growers of young HNS plants under protection, those growing plants outdoors and on hard standings, and a combination of these production systems
 - For the group, 83% of crop output was derived from outdoor production and 17% was derived from protected production
 - Total gross output increased by 79%, while total costs increased by 78%, which led to an increase in Farm Business Income (FBI) per business of 48% to £175,350

2.9 Other Horticulture [Tables 2.12 and 2.13]

- *Other horticultural businesses [Table 2.12]*
 - The table refers to a diverse group of farms, for which crop output is comprised of a combination of outdoor vegetables, ornamentals, soft fruit, top fruit, and farm crops
 - In 2022/23, farm crops accounted for 51% of crop, followed by soft fruit at 23%, flowers and nursery crops at 18%, outdoor vegetables at 3% and glasshouse crops at 4%
 - Farm profitability increased by 83% to £61,035 per business
 - Premium businesses recorded an FBI per hectare of £2,907, compared to the average of £1,150
- *Mainly outdoor vegetables – 50% or more output derived from outdoor vegetables [Table 2.13]*
 - Sub-group of other horticultural businesses with more than 50% of output derived from outdoor vegetable production
 - Average cropping area of this group remained fairly constant, averaging 8.0ha in 2022/23
 - Farm Business Income (FBI) per hectare increased £605/ha to £2,283/ha
 - Gross output per hectare increased by 20% while total costs increased by 16%

2.10 Balance Sheet Information [Table 2.14]

- The assets, liabilities and net worth for the horticulture sample are reported in table 2.14

Table 2.3 All horticultural businesses

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22	2022/23	2021/22	2022/23	2021/22	2022/23
Number of businesses	130	76	130	76	130	76
Productive cropping area (ha)	15.11	24.78	15.11	24.78		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	440,354	700,832	29,134	28,283	100.0	100.0
Variable costs						
Seed & young plants	64,388	120,469	4,260	4,862	14.6	17.2
Fertilisers & composts	12,099	16,198	800	654	2.7	2.3
Crop protection	9,607	11,198	636	452	2.2	1.6
Market charges	22,686	21,564	1,501	870	5.2	3.1
Packing materials	19,859	12,757	1,314	515	4.5	1.8
Horticultural sundries	19,080	35,126	1,262	1,418	4.3	5.0
Glasshouse fuel	4,351	13,969	288	564	1.0	2.0
Other variable costs	539	272	36	11	0.1	0.0
Total variable costs	152,609	231,553	10,097	9,345	34.7	33.0
Total gross margin	287,745	469,279	19,037	18,938	65.3	67.0
Fixed costs						
Labour:						
Regular paid	74,954	134,661	4,959	5,434	17.0	19.2
Regular unpaid	34,351	33,972	2,273	1,371	7.8	4.8
Casual labour	49,245	55,527	3,258	2,241	11.2	7.9
Power & machinery costs:						
Contract & hire	9,255	20,258	612	818	2.1	2.9
Fuel & electricity	14,132	26,972	935	1,088	3.2	3.8
Repairs	9,585	14,643	634	591	2.2	2.1
Machinery depreciation	10,526	24,938	696	1,006	2.4	3.6
Glasshouse depreciation	2,233	4,216	148	170	0.5	0.6
Rent (incl. imputed)	19,510	29,322	1,291	1,183	4.4	4.2
Other costs:						
Occupier's repairs	8,002	10,868	529	439	1.8	1.6
Permanent crop depreciation	3,454	3,431	229	138	0.8	0.5
Water	1,624	1,675	107	68	0.4	0.2
Sundries	21,478	32,189	1,421	1,299	4.9	4.6
Total fixed costs	258,350	392,672	17,093	15,847	58.7	56.0
Management & investment income	29,395	76,607	1,945	3,092	6.7	10.9
Minus: management salaries	138	28	9	1	0.0	0.0
Plus: farmer & spouse labour	26,961	27,808	1,784	1,122	6.1	4.0
Net farm income	56,217	104,387	3,719	4,213	12.8	14.9
Farm business income	60,625	95,618	4,011	3,859	13.8	13.6

Crop output per cent of total crop output (%)

	Average 2021/22	Average 2022/23
Glasshouse crops		
Flowers & nursery stock	17.9	19.0
Tomatoes	1.7	1.9
Lettuce	0.1	0.2
Soft fruit	2.9	4.5
Other glasshouse crops	4.5	0.6
Outdoor crops		
Flowers and nursery stock	33.5	39.3
Vegetables	1.1	0.4
Other outdoor crops	7.1	19.4
Top fruit		
Dessert apples and pears	7.3	4.0
Culinary apples	0.4	0.2
Cider apples	1.0	0.3
Plums	0.5	0.3
Other top fruit	1.7	0.5
Soft fruit		
Strawberries	10.1	5.9
Raspberries	7.1	3.1
Blackcurrants	0.1	0.1
Other soft fruit	3.0	0.5
Total	100.0	100.0

Distribution of tenant's type capital (%)

	Average 2021/22	Average 2022/23
Crops and tillages	14	13
Stores	6	6
Glasshouses	6	4
Equipment	24	34
Livestock	0	0
Other	49	43
Total	100	100

Tenant's capital (£)	643,953	1,096,780
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Table 2.4 All specialist glass businesses*

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22	2022/23 [^]	2021/22	2022/23 [^]	2021/22	2022/23 [^]
Number of businesses	31	11	31	11	31	11
Productive cropping area (ha)	4.18	9.13	4.18	9.13		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	741,343	1,259,728	177,252	137,968	100.0	100.0
Variable costs						
Seed & young plants	128,616	219,525	30,752	24,043	17.3	17.4
Fertilisers & composts	28,748	25,189	6,874	2,759	3.9	2.0
Crop protection	6,358	7,665	1,520	840	0.9	0.6
Market charges	16,705	12,414	3,994	1,360	2.3	1.0
Packing materials	21,485	30,504	5,137	3,341	2.9	2.4
Horticultural sundries	33,378	113,503	7,981	12,431	4.5	9.0
Glasshouse fuel	39,964	124,436	9,555	13,629	5.4	9.9
Other variable costs	0	0	0	0	0.0	0.0
Total variable costs	275,254	533,236	65,812	58,401	37.1	42.3
Total gross margin	466,089	726,492	111,440	79,567	62.9	57.7
Fixed costs						
Labour:						
Regular paid	172,968	358,382	41,356	39,251	23.3	28.4
Regular unpaid	36,605	40,105	8,752	4,392	4.9	3.2
Casual labour	49,985	16,611	11,951	1,819	6.7	1.3
Power & machinery costs:						
Contract & hire	5,218	6,167	1,248	675	0.7	0.5
Fuel & electricity	27,583	48,504	6,595	5,312	3.7	3.9
Repairs	12,949	17,527	3,096	1,920	1.7	1.4
Machinery depreciation	16,235	25,699	3,882	2,815	2.2	2.0
Glasshouse depreciation	15,698	31,267	3,753	3,424	2.1	2.5
Rent (incl. imputed)	17,766	24,390	4,248	2,671	2.4	1.9
Other costs:						
Occupier's repairs	14,975	24,471	3,580	2,680	2.0	1.9
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	2,823	4,249	675	465	0.4	0.3
Sundries	31,920	31,042	7,632	3,400	4.3	2.5
Total fixed costs	404,725	628,414	96,768	68,825	54.6	49.9
Management & investment income	61,364	98,078	14,672	10,742	8.3	7.8
Minus: management salaries	439	22	105	2	0.1	0.0
Plus: farmer & spouse labour	31,800	32,982	7,603	3,612	4.3	2.6
Net farm income	92,725	131,037	22,170	14,351	12.5	10.4
Farm business income	83,393	96,226	19,939	10,539	11.2	7.6

[^] Data is derived from a very small sample size and thus there is a lower degree of confidence in the figures

Crop output per cent of total crop output (%)

	Average 2021/22	Average 2022/23^
Glasshouse crops		
Flowers & nursery stock	50.3	64.3
Tomatoes	10.4	9.8
Lettuce	0.2	1.0
Soft fruit	9.8	19.1
Other glasshouse crops	24.8	1.9
Outdoor crops		
Flowers & nursery stock	3.1	1.8
Vegetables	0.1	0.0
Fruit	0.8	1.3
Other outdoor crops	0.5	0.7
Total	100.0	100.0

Distribution of tenant's type capital (%)

	Average 2021/22	Average 2022/23^
Crops & tillages	5	5
Stores	8	5
Glasshouses	28	25
Equipment	23	27
Livestock	0	0
Other	36	39
Total	100	100

Tenant's capital (£)	967,001	1,432,857
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** no premium figures, sample too small*

Table 2.5 Specialist glass businesses, mainly edible crops*

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22	2022/23 [^]	2021/22	2022/23 [^]	2021/22	2022/23 [^]
Number of businesses	14	6	14	6	14	6
Productive cropping area (ha)	2.86	5.61	2.86	5.61		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	666,314	773,321	233,129	137,935	100.0	100.0
Variable costs						
Seed & young plants	67,444	15,122	23,597	2,697	10.1	2.0
Fertilisers & composts	41,505	12,130	14,522	2,164	6.2	1.6
Crop protection	7,329	2,701	2,564	482	1.1	0.3
Market charges	17,998	3,951	6,297	705	2.7	0.5
Packing materials	12,176	3,663	4,260	653	1.8	0.5
Horticultural sundries	30,639	19,991	10,720	3,566	4.6	2.6
Glasshouse fuel	63,137	170,994	22,090	30,500	9.5	22.1
Other variable costs	0	0	0	0	0.0	0.0
Total variable costs	240,227	228,553	84,050	40,766	36.1	29.6
Total gross margin	426,087	544,769	149,079	97,169	63.9	70.4
Fixed costs						
Labour:						
Regular paid	154,240	187,160	53,965	33,383	23.1	24.2
Regular unpaid	31,375	28,844	10,977	5,145	4.7	3.7
Casual labour	42,188	22,120	14,761	3,945	6.3	2.9
Power & machinery costs:						
Contract & hire	4,249	5,437	1,487	970	0.6	0.7
Fuel & electricity	23,521	13,653	8,229	2,435	3.5	1.8
Repairs	10,401	17,670	3,639	3,152	1.6	2.3
Machinery depreciation	15,073	22,957	5,274	4,095	2.3	3.0
Glasshouse depreciation	18,135	16,032	6,345	2,860	2.7	2.1
Rent (incl. imputed)	15,801	17,606	5,528	3,140	2.4	2.3
Other costs:						
Occupier's repairs	14,188	7,468	4,964	1,332	2.1	1.0
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	3,789	1,667	1,326	297	0.6	0.2
Sundries	15,973	18,274	5,589	3,260	2.4	2.4
Total fixed costs	348,932	358,889	122,084	64,014	52.4	46.4
Management & investment income	77,155	185,880	26,995	33,155	11.6	24.0
Minus: management salaries	177	32	62	6	0.0	0.0
Plus: farmer & spouse labour	27,625	24,162	9,665	4,310	4.1	3.1
Net farm income	104,603	210,010	36,598	37,459	15.7	27.2
Farm business income	92,298	196,124	32,293	34,982	13.9	25.4

[^] Data is derived from a very small sample size and thus there is a lower degree of confidence in the figures

Crop output per cent of total crop output (%)

	Average 2021/22	Average 2022/23^
Glasshouse crops		
Flowers & nursery stock	3.0	0.0
Tomatoes	21.8	29.7
Lettuce	0.4	2.9
Soft fruit	20.7	57.6
Other glasshouse crops	52.1	5.8
Outdoor crops		
Flowers & nursery stock	0.0	0.0
Vegetables	0.2	0.0
Fruit	1.8	4.0
Other outdoor crops	0.0	0.0
Total	100.0	100.0

Distribution of tenant's type capital (%)

	Average 2021/22	Average 2022/23^
Crops & tillages	1	0
Stores	7	4
Glasshouses	36	24
Equipment	25	30
Livestock	0	0
Other	31	42
Total	100	100

Tenant's capital (£)	874,136	1,134,707
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** no premium figures, sample too small*

Table 2.6 Specialist glass businesses, mainly ornamental crops*

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22	2022/23 [^]	2021/22	2022/23 [^]	2021/22	2022/23 [^]
Number of businesses	17	5	17	5	17	5
Productive cropping area (ha)	5.62	16.84	5.62	16.84		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	822,597	2,323,593	146,459	137,992	100.0	100.0
Variable costs						
Seed & young plants	194,863	666,593	34,694	39,587	23.7	28.7
Fertilisers & composts	14,933	53,750	2,659	3,192	1.8	2.3
Crop protection	5,307	18,524	945	1,100	0.6	0.8
Market charges	15,304	30,926	2,725	1,837	1.9	1.3
Packing materials	31,566	89,209	5,620	5,298	3.8	3.8
Horticultural sundries	36,345	318,031	6,471	18,887	4.4	13.7
Glasshouse fuel	14,869	22,605	2,647	1,342	1.8	1.0
Other variable costs	0	0	0	0	0.0	0.0
Total variable costs	313,188	1,199,638	55,761	71,243	38.1	51.6
Total gross margin	509,410	1,123,955	90,698	66,749	61.9	48.4
Fixed costs						
Labour:						
Regular paid	193,251	732,876	34,407	43,524	23.5	31.5
Regular unpaid	42,270	64,733	7,526	3,844	5.1	2.8
Casual labour	58,429	4,561	10,403	271	7.1	0.2
Power & machinery costs:						
Contract & hire	6,267	7,764	1,116	461	0.8	0.3
Fuel & electricity	31,982	124,728	5,694	7,407	3.9	5.4
Repairs	15,709	17,215	2,797	1,022	1.9	0.7
Machinery depreciation	17,492	31,698	3,114	1,882	2.1	1.4
Glasshouse depreciation	13,058	64,590	2,325	3,836	1.6	2.8
Rent (incl. imputed)	19,894	39,227	3,542	2,330	2.4	1.7
Other costs:						
Occupier's repairs	15,827	61,662	2,818	3,662	1.9	2.7
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	1,777	9,896	316	588	0.2	0.4
Sundries	49,191	58,968	8,758	3,502	6.0	2.5
Total fixed costs	465,147	1,217,918	82,817	72,329	56.5	52.4
Management & investment income	44,263	-93,963	7,881	-5,580	5.4	-4.0
Minus: management salaries	722	0	129	0	0.1	0.0
Plus: farmer & spouse labour	36,321	52,272	6,467	3,104	4.4	2.2
Net farm income	79,862	-41,690	14,219	-2,476	9.7	-1.8
Farm business income	73,749	-122,270	13,131	-7,261	9.0	-5.3

[^] Data is derived from a very small sample size and thus there is a lower degree of confidence in the figures

Crop output per cent of total crop output (%)

	Average 2021/22	Average 2022/23^
Glasshouse crops		
Flowers & nursery stock	93.1	96.2
Tomatoes	0.0	0.0
Lettuce	0.0	0.0
Soft fruit	0.0	0.0
Other glasshouse crops	0.0	0.0
Outdoor crops		
Flowers & nursery stock	5.9	2.7
Vegetables	0.0	0.0
Fruit	0.0	0.0
Other outdoor crops	0.9	1.1
Total	100.0	100.0

Distribution of tenant's type capital (%)

	Average 2021/22	Average 2022/23^
Crops & tillages	8	10
Stores	8	7
Glasshouses	20	25
Equipment	22	23
Livestock	0	0
Other	41	35
Total	100	100

Tenant's capital (£)	967,001	1,432,857
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* no premium figures, sample too small

Table 2.7 Specialist glass businesses (90% or more of crop output from glasshouse production) - mainly edible crops*

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22 [^]	2022/23 [^]	2021/22 [^]	2022/23 [^]	2021/22 [^]	2022/23 [^]
Number of businesses	7	5	7	5	7	5
Productive cropping area (ha)	0.95	0.64	0.95	0.64		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	471,742	475,968	495,655	745,268	100.0	100.0
Variable costs						
Seed & young plants	21,528	15,624	22,619	24,464	4.6	3.3
Fertilisers & composts	16,397	12,751	17,228	19,966	3.5	2.7
Crop protection	2,357	2,234	2,476	3,499	0.5	0.5
Market charges	24,270	3,949	25,500	6,183	5.1	0.8
Packing materials	6,770	1,613	7,113	2,526	1.4	0.3
Horticultural sundries	13,729	13,325	14,425	20,864	2.9	2.8
Glasshouse fuel	102,942	180,714	108,160	282,961	21.8	38.0
Other variable costs	0	0	0	0	0.0	0.0
Total variable costs	187,991	230,211	197,521	360,462	39.9	48.4
Total gross margin	283,751	245,758	298,134	384,806	60.1	51.6
Fixed costs						
Labour:						
Regular paid	84,036	53,430	88,296	83,660	17.8	11.2
Regular unpaid	25,066	26,587	26,337	41,631	5.3	5.6
Casual labour	24,292	3,030	25,523	4,744	5.1	0.6
Power & machinery costs:						
Contract & hire	6,107	3,658	6,417	5,728	1.3	0.8
Fuel & electricity	11,878	6,640	12,480	10,398	2.5	1.4
Repairs	10,666	11,529	11,207	18,052	2.3	2.4
Machinery depreciation	17,270	15,710	18,145	24,599	3.7	3.3
Glasshouse depreciation	31,715	16,943	33,323	26,529	6.7	3.6
Rent (incl. imputed)	7,170	5,307	7,534	8,309	1.5	1.1
Other costs:						
Occupier's repairs	15,576	5,551	16,365	8,692	3.3	1.2
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	2,628	1,494	2,762	2,339	0.6	0.3
Sundries	10,402	10,915	10,929	17,091	2.2	2.3
Total fixed costs	246,807	160,794	259,317	251,770	52.3	33.8
Management & investment income	36,944	84,964	38,817	133,036	7.8	17.9
Minus: management salaries	0	0	0	0	0.0	0.0
Plus: farmer & spouse labour	23,565	23,821	24,760	37,299	5.0	5.0
Net farm income	60,510	108,785	63,577	170,335	12.8	22.9
Farm business income	54,233	99,635	56,982	156,008	11.5	20.9

[^] Data is derived from a very small sample size and thus there is a lower degree of confidence in the figures

Crop output per cent of total crop output (%)

	Average 2021/22^	Average 2022/23^
Glasshouse crops		
Flowers & nursery stock	0.0	0.0
Tomatoes	73.1	77.2
Lettuce	1.5	7.6
Soft fruit	17.7	0.0
Other glasshouse crops	7.7	15.1
Outdoor crops		
Flowers & nursery stock	0.0	0.0
Vegetables	0.0	0.0
Fruit	0.0	0.1
Other outdoor crops	0.0	0.0
Total	100.0	100.0

Distribution of tenant's type capital (%)

	Average 2021/22^	Average 2022/23^
Crops & tillages	0	0
Stores	2	1
Glasshouses	55	37
Equipment	24	30
Livestock	0	0
Other	20	32
Total	100	100

Tenant's capital (£)	1,009,285	776,697
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** no premium figures, sample too small*

Table 2.8 All specialist fruit businesses

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22	2022/23	2021/22	2022/23	2021/22	2022/23
Number of businesses	40	33	40	33	40	33
Productive cropping area (ha)	18.92	13.26	18.92	13.26		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	379,710	241,872	20,067	18,239	100.0	100.0
Variable costs						
Seed & young plants	8,835	886	467	67	2.3	0.4
Fertilisers & composts	4,607	1,854	243	140	1.2	0.8
Crop protection	16,340	9,488	864	715	4.3	3.9
Market charges	39,687	20,496	2,097	1,546	10.5	8.5
Packing materials	31,418	9,955	1,660	751	8.3	4.1
Horticultural sundries	9,680	5,482	512	413	2.5	2.3
Glasshouse fuel	51	0	3	0	0.0	0.0
Other variable costs	1,938	953	102	72	0.5	0.4
Total variable costs	112,556	49,114	5,948	3,703	29.6	20.3
Total gross margin	267,154	192,758	14,118	14,535	70.4	79.7
Fixed costs						
Labour:						
Regular paid	40,445	22,378	2,137	1,687	10.7	9.3
Regular unpaid	28,392	30,579	1,500	2,306	7.5	12.6
Casual labour	77,139	25,113	4,077	1,894	20.3	10.4
Power & machinery costs:						
Contract & hire	11,494	7,794	607	588	3.0	3.2
Fuel & electricity	15,147	10,587	800	798	4.0	4.4
Repairs	9,486	5,246	501	396	2.5	2.2
Machinery depreciation	11,335	7,849	599	592	3.0	3.2
Glasshouse depreciation	195	419	10	32	0.1	0.2
Rent (incl. imputed)	26,101	21,461	1,379	1,618	6.9	8.9
Other costs:						
Occupier's repairs	11,554	8,798	611	663	3.0	3.6
Permanent crop depreciation	8,213	6,440	434	486	2.2	2.7
Water	1,250	965	66	73	0.3	0.4
Sundries	18,004	11,033	951	832	4.7	4.6
Total fixed costs	258,756	158,660	13,675	11,964	68.1	65.6
Management & investment income	8,398	34,097	444	2,571	2.2	14.1
Minus: management salaries	188	83	10	6	0.0	0.0
Plus: farmer & spouse labour	20,736	21,856	1,096	1,648	5.5	9.0
Net farm income	28,946	55,870	1,530	4,213	7.6	23.1
Farm business income	33,410	67,264	1,766	5,072	8.8	27.8

Premium businesses	Per hectare	Per £100 of gross output	Crop output per cent of total crop output (%)		
	2022/23^	2022/23^	Average 2021/22	Average 2022/23	Premium 2022/23^
Number of businesses	7	7			
Productive cropping area (ha)	12.91				
	£ per hectare	average %			
Gross output	40,317	100.0			
Variable costs					
Seed & young plants	166	0.4			
Fertilisers & composts	170	0.4			
Crop protection	693	1.7			
Market charges	1,547	3.8			
Packing materials	1,498	3.7			
Horticultural sundries	166	0.4			
Glasshouse fuel	0	0.0			
Other variable costs	94	0.2			
Total variable costs	4,335	10.8			
Total gross margin	35,983	89.2			
Fixed costs					
Labour:					
Regular paid	3,021	7.5			
Regular unpaid	3,283	8.1			
Casual labour	3,724	9.2			
Power & machinery costs:					
Contract & hire	277	0.7			
Fuel & electricity	1,131	2.8			
Repairs	596	1.5			
Machinery depreciation	1,050	2.6			
Glasshouse depreciation	107	0.3			
Rent (incl. imputed)	4,217	10.5			
Other costs:					
Occupier's repairs	1,836	4.6			
Permanent crop depreciation	230	0.6			
Water	157	0.4			
Sundries	815	2.0			
Total fixed costs	20,446	50.7			
Management & investment income	15,537	38.5			
Minus: management salaries	0	0.0			
Plus: farmer & spouse labour	1,273	3.2			
Net farm income	16,810	41.7			
Farm business income	19,550	48.5			

Table 2.9 Specialist fruit businesses, mainly top fruit

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22	2022/23	2021/22	2022/23	2021/22	2022/23
Number of businesses	26	20	26	20	26	20
Productive cropping area (ha)	17.33	13.15	17.33	13.15		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	241,899	213,120	13,961	16,209	100.0	100.0
Variable costs						
Seed & young plants	3,071	261	177	20	1.3	0.1
Fertilisers & composts	3,410	1,553	197	118	1.4	0.7
Crop protection	17,975	13,247	1,037	1,008	7.4	6.2
Market charges	39,122	29,446	2,258	2,239	16.2	13.8
Packing materials	14,504	15,864	837	1,207	6.0	7.4
Horticultural sundries	9,772	8,539	564	649	4.0	4.0
Glasshouse fuel	0	0	0	0	0.0	0.0
Other variable costs	3,093	1,434	179	109	1.3	0.7
Total variable costs	90,947	70,345	5,249	5,350	37.6	33.0
Total gross margin	150,953	142,775	8,712	10,859	62.4	67.0
Fixed costs						
Labour:						
Regular paid	21,755	19,744	1,256	1,502	9.0	9.3
Regular unpaid	24,832	26,379	1,433	2,006	10.3	12.4
Casual labour	44,618	27,290	2,575	2,076	18.4	12.8
Power & machinery costs:						
Contract & hire	13,789	13,259	796	1,008	5.7	6.2
Fuel & electricity	11,816	11,741	682	893	4.9	5.5
Repairs	9,813	6,693	566	509	4.1	3.1
Machinery depreciation	9,283	7,780	536	592	3.8	3.7
Glasshouse depreciation	128	138	7	10	0.1	0.1
Rent (incl. imputed)	15,040	12,108	868	921	6.2	5.7
Other costs:						
Occupier's repairs	4,975	4,153	287	316	2.1	1.9
Permanent crop depreciation	10,273	10,277	593	782	4.2	4.8
Water	1,148	875	66	67	0.5	0.4
Sundries	12,649	10,730	730	816	5.2	5.0
Total fixed costs	180,120	151,167	10,396	11,497	74.5	70.9
Management & investment income	-29,167	-8,392	-1,683	-638	-12.1	-3.9
Minus: management salaries	136	164	8	12	0.1	0.1
Plus: farmer & spouse labour	21,363	22,383	1,233	1,702	8.8	10.5
Net farm income	-7,940	13,828	-458	1,052	-3.3	6.5
Farm business income	-4,135	18,204	-239	1,385	-1.7	8.5

Premium businesses	Per hectare 2022/23^	Per £100 of gross output 2022/23^
Number of businesses	8	8
Productive cropping area (ha)	21.46	
	£ per hectare	average %
Gross output	19,463	100.0
Variable costs		
Seed & young plants	14	0.1
Fertilisers & composts	172	0.9
Crop protection	945	4.9
Market charges	2,458	12.6
Packing materials	1,822	9.4
Horticultural sundries	817	4.2
Glasshouse fuel	0	0.0
Other variable costs	112	0.6
Total variable costs	6,338	32.6
Total gross margin	13,125	67.4
Fixed costs		
Labour:		
Regular paid	1,285	6.6
Regular unpaid	1,824	9.4
Casual labour	2,607	13.4
Power & machinery costs:		
Contract & hire	196	1.0
Fuel & electricity	1,081	5.6
Repairs	670	3.4
Machinery depreciation	548	2.8
Glasshouse depreciation	0	0.0
Rent (incl. imputed)	806	4.1
Other costs:		
Occupier's repairs	163	0.8
Permanent crop depreciation	334	1.7
Water	37	0.2
Sundries	585	3.0
Total fixed costs	10,135	52.1
Management & investment income	2,990	15.4
Minus: management salaries	0	0.0
Plus: farmer & spouse labour	1,529	7.9
Net farm income	4,519	23.2
Farm business income	5,043	25.9

Crop output per cent of total crop output (%)

	Average 2021/22	Average 2022/23	Premium 2022/23^
Top fruit			
Dessert apples	63.5	77.5	83.1
Culinary apples	2.2	2.4	4.0
Cider apples	8.9	6.3	9.3
Plums	4.4	5.4	0.3
Other top fruit	13.3	4.1	0.6
Soft fruit			
Strawberries	0.0	0.0	0.0
Raspberries	1.5	0.0	0.0
Blackcurrants	0.0	0.0	0.0
Other soft fruit	0.0	0.0	0.1
Other crops	0.5	0.4	0.8
Total	100.0	100.0	100.0

Distribution of tenant's type capital (%)

	Average 2021/22	Average 2022/23	Premium 2022/23^
Crops & tillages	8	12	8
Stores	5	2	4
Glasshouses	0	0	0
Equipment	25	26	32
Livestock	2	1	0
Other	60	59	55
Total	100	100	100
Tenant's capital (£)	588,660	499,378	582,666

Table 2.10 Specialist fruit businesses, mainly top fruit-excluding cider

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22	2022/23	2021/22	2022/23	2021/22	2022/23
Number of businesses	19	16	19	16	19	16
Productive cropping area (ha)	14.37	11.13	14.37	11.13		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	250,185	214,709	17,413	19,288	100.0	100.0
Variable costs						
Seed & young plants	3,452	273	240	25	1.4	0.1
Fertilisers & composts	3,100	1,201	216	108	1.2	0.6
Crop protection	19,122	13,514	1,331	1,214	7.6	6.3
Market charges	44,520	31,904	3,099	2,866	17.8	14.9
Packing materials	16,710	17,301	1,163	1,554	6.7	8.1
Horticultural sundries	10,857	8,848	756	795	4.3	4.1
Glasshouse fuel	0	0	0	0	0.0	0.0
Other variable costs	1,942	0	135	0	0.8	0.0
Total variable costs	99,704	73,040	6,940	6,562	39.9	34.0
Total gross margin	150,481	141,669	10,474	12,727	60.1	66.0
Fixed costs						
Labour:						
Regular paid	21,916	20,329	1,525	1,826	8.8	9.5
Regular unpaid	24,529	25,388	1,707	2,281	9.8	11.8
Casual labour	50,415	29,276	3,509	2,630	20.2	13.6
Power & machinery costs:						
Contract & hire	14,408	13,359	1,003	1,200	5.8	6.2
Fuel & electricity	12,613	11,987	878	1,077	5.0	5.6
Repairs	9,913	6,318	690	568	4.0	2.9
Machinery depreciation	9,402	7,781	654	699	3.8	3.6
Glasshouse depreciation	148	150	10	14	0.1	0.1
Rent (incl. imputed)	14,773	10,966	1,028	985	5.9	5.1
Other costs:						
Occupier's repairs	5,387	4,205	375	378	2.2	2.0
Permanent crop depreciation	10,715	10,602	746	952	4.3	4.9
Water	1,153	832	80	75	0.5	0.4
Sundries	12,568	10,599	875	952	5.0	4.9
Total fixed costs	187,939	151,793	13,081	13,636	75.1	70.7
Management & investment income	-37,458	-10,124	-2,607	-910	-15.0	-4.7
Minus: management salaries	134	179	9	16	0.1	0.1
Plus: farmer & spouse labour	22,353	22,449	1,556	2,017	8.9	10.5
Net farm income	-15,240	12,146	-1,061	1,091	-6.1	5.7
Farm business income	-14,103	14,427	-982	1,296	-5.6	6.7

[^] Data is derived from a very small sample size and thus there is a lower degree of confidence in the figures

Table 2.11 All specialist hardy nursery stock businesses*

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22	2022/23 [^]	2021/22	2022/23 [^]	2021/22	2022/23 [^]
Number of businesses	20	8	20	8	20	8
Productive cropping area (ha)	1.77	4.44	1.77	4.44		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	552,810	991,797	312,070	223,149	100.0	100.0
Variable costs						
Seed & young plants	146,429	323,721	82,661	72,836	26.5	32.6
Fertilisers & composts	16,083	11,518	9,079	2,592	2.9	1.2
Crop protection	3,130	3,120	1,767	702	0.6	0.3
Market charges	16,495	24,258	9,312	5,458	3.0	2.4
Packing materials	15,771	7,968	8,903	1,793	2.9	0.8
Horticultural sundries	33,075	20,034	18,671	4,508	6.0	2.0
Glasshouse fuel	866	682	489	154	0.2	0.1
Other variable costs	0	0	0	0	0.0	0.0
Total variable costs	231,848	391,301	130,882	88,041	41.9	39.5
Total gross margin	320,962	600,496	181,188	135,109	58.1	60.5
Fixed costs						
Labour:						
Regular paid	108,555	221,319	61,281	49,796	19.6	22.3
Regular unpaid	39,459	25,756	22,275	5,795	7.1	2.6
Casual labour	11,786	24,265	6,653	5,459	2.1	2.4
Power & machinery costs:						
Contract & hire	5,787	29,588	3,267	6,657	1.0	3.0
Fuel & electricity	8,692	20,625	4,907	4,640	1.6	2.1
Repairs	6,722	12,563	3,795	2,827	1.2	1.3
Machinery depreciation	9,435	19,096	5,326	4,296	1.7	1.9
Glasshouse depreciation	1,099	485	620	109	0.2	0.0
Rent (incl. imputed)	9,570	17,267	5,402	3,885	1.7	1.7
Other costs:						
Occupier's repairs	6,184	6,421	3,491	1,445	1.1	0.6
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	1,948	1,763	1,100	397	0.4	0.2
Sundries	27,920	65,700	15,761	14,782	5.1	6.6
Total fixed costs	237,156	444,846	133,878	100,088	42.9	44.9
Management & investment income	83,806	155,650	47,310	35,020	15.2	15.7
Minus: management salaries	54	0	31	0	0.0	0.0
Plus: farmer & spouse labour	32,375	23,159	18,276	5,211	5.9	2.3
Net farm income	116,127	178,809	65,555	40,231	21.0	18.0
Farm business income	118,263	175,350	66,761	39,453	21.4	17.7

[^] Data is derived from a very small sample size and thus there is a lower degree of confidence in the figures

Crop output per cent of total crop output (%)

	Average 2021/22	Average 2022/23^
Hardy nursery stock		
Glasshouse crops	19.3	16.7
Outdoor crops	80.7	83.3
Other crops	0.0	0.0
Total	100.0	100.0

Distribution of tenant's type capital (%)

	Average 2021/22	Average 2022/23^
Crops & tillages	24	23
Stores	7	2
Glasshouses	3	0
Equipment	16	18
Livestock	0	0
Other	50	57
Total	100	100

Tenant's capital (£)	682,263	1,549,538
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** no premium figures, sample too small*

Table 2.12 All other horticulture businesses

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22	2022/23	2021/22	2022/23	2021/22	2022/23
Number of businesses	39	24	39	24	39	24
Productive cropping area (ha)	24.91	53.07	24.91	53.07		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	322,251	681,128	12,934	12,835	100.0	100.0
Variable costs						
Seed & young plants	29,781	39,244	1,195	740	9.2	5.8
Fertilisers & composts	10,392	27,979	417	527	3.2	4.1
Crop protection	10,026	19,362	402	365	3.1	2.8
Market charges	15,719	23,314	631	439	4.9	3.4
Packing materials	13,465	12,871	540	243	4.2	1.9
Horticultural sundries	12,196	44,853	490	845	3.8	6.6
Glasshouse fuel	396	227	16	4	0.1	0.0
Other variable costs	0	16	0	0	0.0	0.0
Total variable costs	91,974	167,866	3,692	3,163	28.5	24.6
Total gross margin	230,276	513,262	9,243	9,672	71.5	75.4
Fixed costs						
Labour:						
Regular paid	50,095	91,992	2,011	1,733	15.5	13.5
Regular unpaid	34,608	40,567	1,389	764	10.7	6.0
Casual labour	54,805	113,559	2,200	2,140	17.0	16.7
Power & machinery costs:						
Contract & hire	11,167	27,748	448	523	3.5	4.1
Fuel & electricity	13,607	37,660	546	710	4.2	5.5
Repairs	10,821	22,588	434	426	3.4	3.3
Machinery depreciation	9,123	42,233	366	796	2.8	6.2
Glasshouse depreciation	922	1,486	37	28	0.3	0.2
Rent (incl. imputed)	22,146	45,560	889	859	6.9	6.7
Other costs:						
Occupier's repairs	4,662	11,444	187	216	1.4	1.7
Permanent crop depreciation	3,250	4,571	130	86	1.0	0.7
Water	1,348	1,373	54	26	0.4	0.2
Sundries	16,586	25,323	666	477	5.1	3.7
Total fixed costs	233,141	466,106	9,358	8,783	72.3	68.4
Management & investment income	-2,864	47,156	-115	889	-0.9	6.9
Minus: management salaries	79	6	3	0	0.0	0.0
Plus: farmer & spouse labour	26,488	34,171	1,063	644	8.2	5.0
Net farm income	23,544	81,321	945	1,532	7.3	11.9
Farm business income	33,350	61,035	1,339	1,150	10.3	9.0

Premium businesses	Per hectare	Per £100 of gross output	Crop output per cent of total crop output (%)			
	2022/23^	2022/23^		Average 2021/22	Average 2022/23	Premium 2022/23^
Number of businesses	6	6				
Productive cropping area (ha)	21.65		Glasshouse crops	14.7	4.2	18.4
	£ per hectare	average %	Outdoor vegetables:			
			Brassicas	3.9	1.1	16.4
			Legumes	0.6	0.8	0.0
Gross output	10,347	100.0	Salad crops	0.2	0.0	0.0
			Other outdoor vegetables	3.1	1.1	0.0
Variable costs						
Seed & young plants	845	8.2	Flowers & nursery stock	13.7	18.4	5.9
Fertilisers & composts	270	2.6	Soft fruit	39.4	23.4	15.9
Crop protection	334	3.2	Top fruit	0.1	0.0	0.0
			Other crops	24.3	51.0	43.4
Market charges	306	3.0				
Packing materials	139	1.3	Total	100.0	100.0	100.0
Horticultural sundries	253	2.4				
Glasshouse fuel	15	0.1				
Other variable costs	0	0.0				
Total variable costs	2,164	20.9	Distribution of tenant's type capital (%)			
Total gross margin	8,183	79.1		Average 2021/22	Average 2022/23	Premium 2022/23^
Fixed costs						
Labour:			Crops & tillages	17	8	7
Regular paid	2,016	19.5	Stores	7	10	10
Regular unpaid	1,035	10.0	Glasshouses	3	2	0
Casual labour	722	7.0	Equipment	28	52	24
			Livestock	0	0	0
Power & machinery costs:			Other	44	28	59
Contract & hire	160	1.5				
Fuel & electricity	594	5.7	Total	100	100	100
Repairs	199	1.9				
Machinery depreciation	216	2.1				
Glasshouse depreciation	5	0.0	Tenant's capital (£)	500,716	1,187,530	292,786
Rent (incl. imputed)	546	5.3				
Other costs:						
Occupier's repairs	207	2.0				
Permanent crop depreciation	127	1.2				
Water	13	0.1				
Sundries	665	6.4				
Total fixed costs	6,505	62.9				
Management & investment income	1,678	16.2				
Minus: management salaries	0	0.0				
Plus: farmer & spouse labour	1,035	10.0				
Net farm income	2,713	26.2				
Farm business income	2,907	28.1				

^ Data is derived from a very small sample size and thus there is a lower degree of confidence in the figures

Table 2.13 Other horticulture businesses, mainly outdoor vegetable crops*

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2021/22	2022/23 [^]	2021/22	2022/23 [^]	2021/22	2022/23 [^]
Number of businesses	12	7	12	7	12	7
Productive cropping area (ha)	8.65	8.04	8.65	8.04		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
Gross output	125,279	139,868	14,490	17,395	100.0	100.0
Variable costs						
Seed & young plants	6,713	5,379	776	669	5.4	3.8
Fertilisers & composts	2,241	2,267	259	282	1.8	1.6
Crop protection	1,338	982	155	122	1.1	0.7
Market charges	4,135	411	478	51	3.3	0.3
Packing materials	8,513	6,241	985	776	6.8	4.5
Horticultural sundries	1,698	1,428	196	178	1.4	1.0
Glasshouse fuel	202	66	23	8	0.2	0.0
Other variable costs	0	0	0	0	0.0	0.0
Total variable costs	24,839	16,775	2,873	2,086	19.8	12.0
Total gross margin	100,441	123,093	11,617	15,309	80.2	88.0
Fixed costs						
Labour:						
Regular paid	23,506	30,260	2,719	3,763	18.8	21.6
Regular unpaid	42,715	43,106	4,941	5,361	34.1	30.8
Casual labour	14,792	21,098	1,711	2,624	11.8	15.1
Power & machinery costs:						
Contract & hire	2,592	1,701	300	212	2.1	1.2
Fuel & electricity	6,885	7,128	796	886	5.5	5.1
Repairs	4,153	3,998	480	497	3.3	2.9
Machinery depreciation	4,858	6,917	562	860	3.9	4.9
Glasshouse depreciation	730	1,471	84	183	0.6	1.1
Rent (incl. imputed)	12,780	12,497	1,478	1,554	10.2	8.9
Other costs:						
Occupier's repairs	3,798	6,310	439	785	3.0	4.5
Permanent crop depreciation	1,064	2,033	123	253	0.8	1.5
Water	920	733	106	91	0.7	0.5
Sundries	9,375	11,568	1,084	1,439	7.5	8.3
Total fixed costs	128,168	148,819	14,824	18,508	102.3	106.4
Management & investment income	-27,727	-25,726	-3,207	-3,200	-22.1	-18.4
Minus: management salaries	8	19	1	2	0.0	0.0
Plus: farmer & spouse labour	35,939	37,211	4,157	4,628	28.7	26.6
Net farm income	8,204	11,466	949	1,426	6.5	8.2
Farm business income	14,511	18,359	1,678	2,283	11.6	13.1

[^] Data is derived from a very small sample size and thus there is a lower degree of confidence in the figures

Crop output per cent of total crop output (%)

	Average 2021/22	Average 2022/23^
Glasshouse crops	10.3	11.3
Outdoor vegetables:		
Brassicas	23.7	18.1
Legumes	0.3	0.0
Salad crops	1.1	0.0
Other outdoor vegetables	21.7	17.4
Flowers & nursery stock	0.3	0.4
Soft fruit	0.0	0.0
Top fruit	0.7	0.0
Other crops	41.9	52.7
Total	100.0	100.0

Distribution of tenant's type capital (%)

	Average 2021/22	Average 2022/23^
Crops & tillages	1	1
Stores	5	1
Glasshouses	6	6
Equipment	32	34
Livestock	0	0
Other	55	58
Total	100	100

Tenant's capital (£)	213,390	321,191
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** no premium figures, sample too small*

Table 2.14 Balance sheet data for horticultural businesses

Group	All horticulture		Specialist glass ^		Specialist fruit	
Number of businesses	76		11		33	
Harvest year	2022/23 Opening	2022/23 Closing	2022/23 Opening	2022/23 Closing	2022/23 Opening	2022/23 Closing
Assets						
Fixed assets						
Land,buildings & SPS entitlement	774,918	818,436	927,384	937,593	1,197,816	1,242,954
Breeding livestock	341	320	0	0	1,220	1,145
Machinery & glasshouses	175,413	195,517	180,247	202,447	64,523	73,187
Permanent crops	19,886	19,392	0	0	46,699	45,954
Miscellaneous business assets	74	74	0	0	264	264
Total fixed assets	970,632	1,033,740	1,107,631	1,140,040	1,310,522	1,363,505
Current assets						
Crops & trading livestock	68,993	72,939	31,006	36,323	18,160	23,275
Goods in store	27,544	36,857	30,272	43,047	7,246	7,561
Liquid assets	223,641	199,114	240,505	311,546	65,706	74,614
Total current assets	320,177	308,911	301,783	390,916	91,112	105,450
Total assets	1,290,810	1,342,651	1,409,414	1,530,955	1,401,634	1,468,955
Liabilities						
Bank term loan	110,118	93,279	183,253	168,234	87,633	79,874
Other loans	70,751	68,827	258,423	237,905	15,448	14,469
Bank overdraft	14,984	16,821	20,304	57,564	6,662	5,867
Other short term loans	89,602	72,068	71,048	111,185	20,199	24,402
Total external liabilities	285,454	250,995	533,028	574,887	129,943	124,612
Net worth	1,005,356	1,091,656	876,385	956,069	1,271,691	1,344,343
Percentage equity (%)	77.9%	81.3%	62.2%	62.4%	90.7%	91.5%

Group	Specialist HNS ^		Other horticulture	
Number of businesses	8		24	
Harvest year	2022/23 Opening	2022/23 Closing	2022/23 Opening	2022/23 Closing
Assets				
Fixed assets				
Land,buildings & SPS entitlement	375,822	388,171	679,949	754,611
Breeding livestock	0	0	0	0
Machinery & glasshouses	127,581	144,830	294,723	325,167
Permanent crops	0	0	19,144	18,345
Miscellaneous business assets	0	0	1	1
Total fixed assets	503,403	533,001	993,817	1,098,124
Current assets				
Crops & trading livestock	162,428	193,173	54,204	37,789
Goods in store	17,974	20,394	49,393	69,578
Liquid assets	515,991	360,352	134,583	147,438
Total current assets	696,394	573,918	238,181	254,804
Total assets	1,199,797	1,106,919	1,231,998	1,352,928
Liabilities				
Bank term loan	103,039	71,294	110,167	96,236
Other loans	0	0	106,332	108,045
Bank overdraft	5,431	2,722	26,639	22,827
Other short term loans	220,713	102,281	56,611	75,872
Total external liabilities	329,183	176,298	299,748	302,980
Net worth	870,614	930,622	932,249	1,049,948
Percentage equity (%)	72.6%	84.1%	75.7%	77.6%

^ Data is derived from a very small sample size and thus there is a lower degree of confidence in the figures

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Glossary

Costs

Expenditure plus opening valuation less closing valuation (where appropriate). Interest on borrowed capital, including bank overdrafts is not included in these calculations.

Farm Business Income (FBI)

Represents the return to all unpaid labour (farmers, spouses and others with an entrepreneurial interest in the farm business) and to all their capital invested in the farm business including land and farm buildings. It is defined as Total Farm Output (TFO) minus cost (C): where TFO is defined as the sum of output from: crop enterprises, adjustment for disposal of previous crops, livestock enterprises, separable non-agricultural diversifications, basic payment scheme, agri-environmental payments, other grants and subsidies, miscellaneous receipts; C is defined as variable costs plus fixed costs.

Farm crops

Comprise cereals and other non-horticultural cash crops, fodder crops and grassland.

Fixed costs

These include rent (or imputed rent), regular wages, unpaid manual labour, casual labour, power and machinery costs, glasshouse depreciation, building and general repairs, insurance, water, office expenses and miscellaneous expenditure.

Gross output

Total revenue inclusive of marketing charges, where known, adjusted for changes in valuation of crops and tillage, and less purchases of livestock, or produce for resale. Gross output per hectare reflects the intensity of the system as well as the yields and prices obtained.

Labour

Covers not only the costs of hired labour, but also an appropriate allowance for the unpaid manual labour of the grower and members of the family.

Management and investment income

Total gross output less all costs (including the value of unpaid labour) other than salaried management. It represents the reward to management and use of 'tenant's capital' whether that capital is borrowed or not.

Management salaries

Includes all paid managerial input and represents that part of total paid labour which relates to managerial work

Marketing charges

Include, where known, packhouse charges, paid carriage and commission and handling charges levied on sales.

Net farm income

Represents the return to the grower and spouse for their manual labour as well as for their management and capital investment.

Occupier's repairs

This includes maintenance of glass and the associated heating equipment, as well as traditional tenant type repairs.

Per £100 gross output

Shows the relative importance of the main resources used in each unit product, and in total provide a useful measure of profitability.

Power and machinery

Include contract and hire, fuel, electricity, repairs and an allowance for depreciation. A deduction is made for the private use of vehicles. Machinery depreciation is calculated on a 'replacement cost' basis.

Premium results

Farm performance is measured as the ratio of farm business output to farm business costs. An imputed value for unpaid manual labour, including that of the farmer and spouse is added to farm business costs. The value of paid managerial input is subtracted. The farms are ranked in descending order according to this ratio and allocated to quartiles with the top quartile (25 percent) representing the high performance band (Premium Group). Note that the farm weights are used to allocate farms to quartiles so the number of farms in a quartile will not necessarily be equivalent to a quarter of the sample.

Rent

In the case of an owner occupier, an imputed rent is charged in accordance with what a tenant in similar circumstances, including length of occupation, would be paying.

Standards

Average results are drawn from all businesses in a particular group.

Tenant's capital

Assets normally provided by tenants and includes growing crops, stores, machinery, livestock, cash and other assets needed to run the business. Permanent crops (including orchards) and glasshouses are also considered to be tenant-type capital. It represents approximately the capital currently invested in the horticultural business. The difficulties involved in making realistic assessments of tenant's capital, particularly of permanent fruit crops, should be kept in mind when interpreting these results.

Total gross margin

This is the difference between total gross output and total variable costs and measures the contribution of the business towards covering its fixed costs and providing for a profit.

Variable costs

These vary in direct proportion to the size of each business enterprise and include all purchased seed & plants, fertiliser & composts, crop protection, market charges, packing materials, horticultural sundries, glasshouse fuel and other variable costs.

Abbreviations used in this Publication

/	per
£	pounds (sterling)
Defra	Department for Environment, Food and Rural Affairs
Ave	Average
depn.	Depreciation
Fert	Fertiliser
ha	hectare
HNS	Hardy nursery stock
no.	number
n/a	not applicable

Rounding

Totals are calculated from unrounded components and may not therefore be the total of the rounded components shown.

Derivation of Farm Business Income

Net Farm Income

Plus:

Value of unpaid labour [excluding farmer & spouse; already taken into account in deriving Net Farm Income]

Imputed rent and rental value

Less:

Net interest payments

Ownership charges [buildings & works depreciation; insurance of farm buildings; landlord-type repairs and upkeep]

Director's remuneration

Equals:

Farm Business Income

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