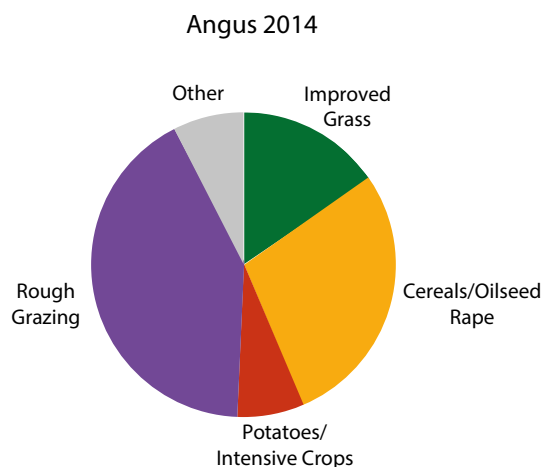
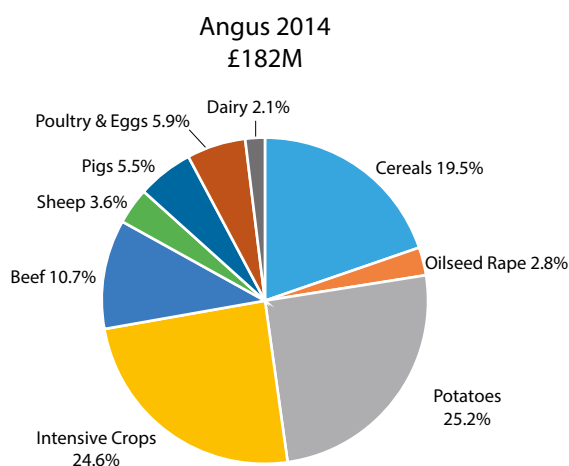


# NE LAND BASED STUDY - ANGUS AT A GLANCE

**Scotlands most intensive cropping region...**

**...despite a large rough grazing area**



**Mixed farming with grass is less common than elsewhere**

**Large full time farms .....**

2014	Angus	Aberdeen shire	Moray	Scotland
Arable %	<b>70</b>	51	39	31
% Cereals Winter sown	<b>39</b>	27	11	37

2014	Estimated farm size (ha)	%FT
Angus	322	56
Aberdeenshire	199	43
Moray	277	48

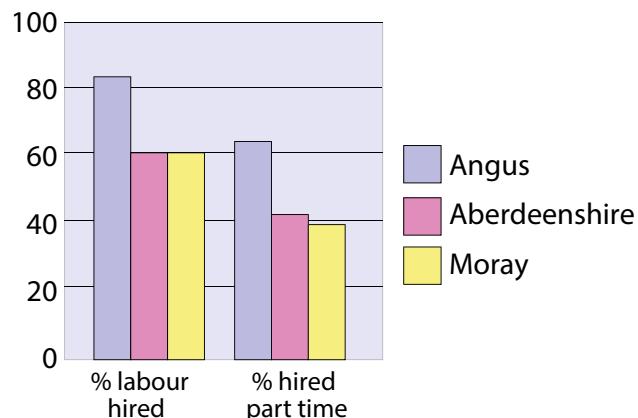
**..... with big hired labour force, but mostly PT/seasonal**

Potatoes, fruit, veg, flowers = 50% of output

Grow third of Scotland's potatoes = saturation point

Soft fruit success story (area doubled and Scotland = 25% of UK crop)

Farm woodlands insignificant (5% of farm area)



**SO, WHAT IS CHANGING? SPECIALISATION**

# NE LAND BASED STUDY - ANGUS AT A GLANCE

## Glens going out of agriculture, lowground intensifying cropping

2007-14	Beef cows	Finishing Cattle	Ewes	Total Farm Labour
Angus Glens	-36	+9	-15	+2
SE Angus	-1	-23	+1	+25
Strathmore	-2	-19	-13	-8

## Dundee provides fewer work opportunities for hinterland than Aberdeen .....

	Median household income 2008 - 09 £/week	% holdings with non-agricultural activity 2010
Angus	499	13
Dundee	349	
Aberdeenshire	595	6.5
Scotland	468	8

..... so higher rate of diversification.

High uptake of processing and marketing grants, but low level of renewables.

### Key Challenges

Loss of livestock = soil decline?

Some areas too heavily cropped - no room to expand, build up of problems e.g. PCN.

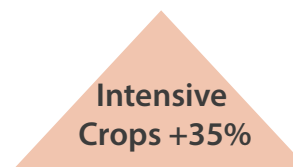
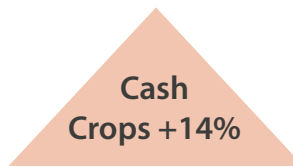
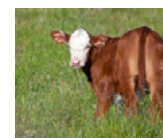
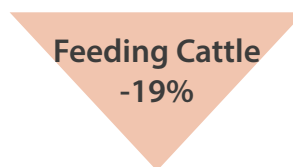
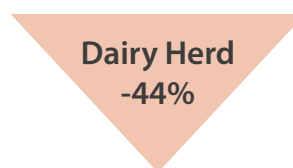
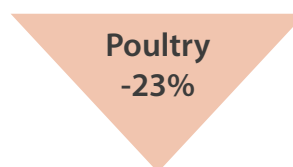
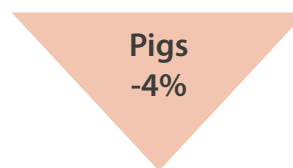
Heavily reliant on seasonal migrant labour.

Loss of pool of local labour - lack basic skills, not interested.

Concentration of buyers and supermarket wars.

Glens decline and no local red meat abattoir.

## Down horn, up corn .....



### Key Opportunities

Angus micro-climate, farm size, soils and intensive cropping/marketing skills

Close to central belt population and retailer distribution centres

Stunning easily accessed area - agri-food tourism?

Links to R&D (JHI Dundee)

Dundee regeneration

Adding more value to local produce