

Agribusiness NEWS

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News in brief

June 2024

Show Time

With barbecue season upon us, lamb prices are currently smoking hot, with no signs of cooling in the short term linked to high levels of demand as the Muslim Festival of Sacrifice - Eid-al-Adha or Qurbani approaches. However, with beef supply currently exceeding demand, to avoid an own goal, this month's beef article highlights the importance of linking marketing campaigns to big sporting events like Euro 2024 to subtly drive up demand for all cuts of meat.

With the Agriculture and Rural Communities Bill now at the third and final stage in the consultation process, this month's article on future agricultural support gives an overview of the proposed move from a two to a four Tier support system – Base, Enhanced, Elective and Complementary, potentially adding a new avian sounding acronym BEEC to our everyday vocabulary.

This month's policy brief section highlights the inclusion of new grant conditions linked to the Scottish Government's Fair Work First policies for workers and the UK wide Action Plan to try to reduce the threat of anti-microbial resistance.

When it comes to staking your claim from a land management perspective, our article this month on Land Registration highlights that for a land based exercise, it isn't always plain sailing.

With the show season underway and election campaigns starting to ramp up, all eyes and ears are on how each political party factors in the importance of UK agriculture, not just in terms of its importance in feeding the nation but the important role it plays in managing the countryside and in supporting the rural economy.

Next month:

- Blue Tongue update
- Local Food Supply Chains

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This month's editor:
Christine Beaton

Policy Brief

Fair Work First grant conditions

Under the Fair Work conditions introduced by the Scottish Government on the 1st of April 2024, organisations applying for some public sector grants will be required to pay their staff at least the real living wage and also to provide appropriate channels to give workers an effective voice.

While this legal requirement has already been introduced for farmers and crofters applying for grant support under the Crofting Agricultural Grants Scheme (CAGS) and the Forestry Grant Scheme; where funding is allocated, the Fair Work conditionality will be applied from the opening of the next application window for three other schemes:

- Agri – Environment Climate Scheme (AECS)
- Food Processing, Marketing and Co-operation (FPMC)
- Sustainable Agriculture Capital Grant Scheme (SACGS)

Businesses intending to apply for any of these five grant schemes should read the [Fair Work First guidance](#) if they are awarded a contract for grant support as they will need to comply with the principles of Fair Work First

Antimicrobial Resistance

The Scottish Government is supporting a new UK-wide joint action plan to contain and control resistance to antibiotics. Antimicrobial resistance (AMR) is listed among the World Health Organization's top global public health threats and arises when organisms that cause infection evolve ways to survive antibiotic treatment.

The 5-year [AMR National Action Plan](#) sets out key measures to reduce the threat of infection across human, animal, environment and food sectors from microbes including bacteria, fungi, viruses and parasites. The 2024-2029 Plan has four key themes:

1. Reducing the need for, and unintentional exposure to, anti-microbials
2. Optimising the use of antibiotics
3. Investing in innovation and technology
4. Being a good global partner.

While the AMR Action Plan covers both people and livestock, two interesting lines of questions included in the research priorities outlined in the plan are:

- How have reductions in the use of antibiotics in food-producing animals affected antibiotic resistance in people and animals?
- What are the risks associated with use of antibiotics and antifungals use on crops,

particularly in Low and Middle Income Countries (LMIC), and the 'downstream' impact on the environment, humans, and animals?

Going forward, while some of the plan activity will be specifically focused on reducing AMR, other measures will focus on preventative measures including improving animal health or reducing the incidence of infectious diseases.

New Consultation – On Phasing out Cages for Laying Hens

With ~ 1.1 million hens currently being housed in cages in Scotland, the Scottish Government has launched a consultation on phasing out the use of cages to house laying hens for egg production.

Views are being sought on phasing out the use of enriched cages, which offer more room to nest, roost, scratch and rest compared to previously used battery cages.

For a link to the consultation, please click [here](#). The consultation period closes on Tuesday 25th of June 2024.

Visitor Levy Bill Passed

MSPs have backed legislation giving councils a new power to introduce a visitor levy that would raise funding for local visitor facilities and services. The new Visitor Levy (Scotland) Bill will enable local authorities to apply a levy on overnight stays with all money raised to be reinvested in services and facilities largely used by tourists and business visitors.

Councils that want to introduce a visitor levy will be able to do so after they have consulted with local communities, businesses, and tourism organisations. An 18-month implementation period will then apply before any local authorities can introduce a visitor levy scheme in their area.

Key dates

| Date | Action |
|------------|---|
| 1 June 24 | June Census 2024 opens online – ends 30 June 2024 |
| 10 June 24 | AECS – application deadline for Organic Conversion and Maintenance. Stand alone application deadline is the 31 st of July 2024 |
| 10 June 24 | AECS – application deadline for 2024 Agri-Environment plans |
| 12 June 24 | Closing date for the Scottish Government Capital Grant Scheme Survey |

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Cereals and Oilseeds

Old-crop summary & 2024 prospects

In 2023, production in the UK of all major cereal crops declined. The wheat harvest was estimated at 14 Mt, a 10% decrease from 2022, while oat production fell by 18% to 830,000 tonnes. Barley production was just under 7 Mt, down 5.7%, and rapeseed production dropped 11% to 1.2 Mt.

The reduction in wheat production included a 5.1% decrease in the wheat-growing area to 1.7 million hectares, as farmers shifted towards barley and rapeseed, which both saw increased plantings in 2023. The UK wheat yield also declined by 5.2% to 8.1 tonnes per hectare. Looking ahead to 2024, the wheat-growing area is expected to shrink by 15% to 1.463 million hectares, the smallest since 2020.

Barley production in 2023 saw a 9.9% drop in spring barley to 3.8 Mt and a slight 0.2% decrease in winter barley to 3.2 Mt. Despite increased planted areas for both, yields fell 10% for spring barley and 4.5% for winter barley. In 2024, the total barley area is projected to rise by 8% to 1.236 million hectares, with a significant decline in winter barley area offset by increased spring barley plantings. Winter barley is estimated at 355,000 hectares, a 22% reduction, while spring plantings are forecasted to increase by 29%.

Oat production in 2023 hit its lowest level since 2016, due to a 5.1% reduction in area and a 13% decline in yield. For 2024, the oat-growing area is expected to increase by 26% to 209,000 hectares, with a drop in winter plantings more than compensated by a sharp rise in spring plantings. Only 37% of the winter oat crop is rated as good or excellent.

Rapeseed production also fell in 2023, with a 7.2% increase in area insufficient to offset a 17% yield decline. The total area for 2024 is expected to decrease by 28%, reflecting poor autumn and winter growing conditions. The projected 280,000 hectares would be the smallest area since 1984. Only 31% of the winter oilseed crop is rated as good or excellent, indicating poor national harvest prospects.

Given the current wheat crop conditions, with only 34% rated as good or excellent, wheat imports could exceed 2 Mt in 2023-24, the highest level since 2020-21. From July to January, wheat imports totalled 1.251 Mt, a 55% increase year-on-year. Most imports are high protein milling wheat, and the flour milling industry continues to consolidate, with 32 companies operating 51 mills, the four largest companies accounting for 65% of UK flour production.

Market price drivers

Global grain markets rallied in May due to dry conditions in Russia affecting crop prospects. However, the bullish momentum has recently waned with recent rains despite ongoing market volatility driven by weather impacts on crop production. The International Grains Council reduced its forecast for 2024/25 global wheat output by 3.0 Mt to 795 Mt, following downgrades to Russian and Ukrainian crop outlooks to 85.5 Mt and 23.7 Mt, from previous estimates of 90.4 Mt and 24.5 Mt, respectively.

UK feed wheat futures gained less than the global market as May closed out, influenced by sterling's rise against the euro and US dollar. November 2024 UK feed wheat futures increased by £16/t over the last two weeks of May, closing at £218/t at the time of writing and several pounds off the high.

Planting progress in Europe and the US remains a key focus for the maize market, alongside concerns over the Brazilian Safrinha harvest. Despite expectations of heavy maize supplies in the long term, ongoing wheat concerns could drive additional feed demand towards maize.

Global oilseed markets rose last week, led by soymeal and rapeseed. Concerns about crop sizes in major producing countries continue to extend rapeseed's price premium over soyabeans. Predictions of a drawdown in rapeseed stocks also support prices compared to soyabeans.

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Indicative grain prices week ending 31/05/2024 Source: SAC//United oilseeds/AHDB)

| £ per tonne | Basis | June '24 | Harvest '24 | Nov'24 | Nov'25 |
|--------------------|------------------|----------|-------------|--------|--------|
| Wheat | Ex farm Scotland | 200 | 200 | 220 | 210 |
| Feed Barley | Ex farm Scotland | 180 | 185 | 190 | |
| Malt. dist. Barley | Ex farm Scotland | 245 | 245 | | |
| Oilseed Rape | Delivered Dundee | 382 | 382 | 392 | 385 |
| Beans | Ex farm Scotland | 278 | | | |

Beef

Prices at Steak

The Scottish finished beef price in May has remained below the £5 per deadweight kg, sitting at £4.94/kg (down 3p/kg from the previous week) and at £4.95/kg for steers and heifers respectively grading R4L at week ending May 18.

Prices throughout May have fluctuated with Angus premiums falling short of £5/kg/dwt.

Price variations are being reported depending on processor, with reports suggesting that prices are not just dependent on supply but also breed, spec and customer loyalty.

Despite cattle availability in Scotland being tighter this spring due to the numbers of store cattle sold to England in 2023 and suckler cow numbers declining; in recent weeks, demand has relaxed from processors with reports suggesting that cattle supplies are greater than forecasted coupled with little demand for steak meat.

Young bulls will start to come onstream now which will help lift numbers, over the coming months, whilst steer and heifer availability looks to remain tight. Finishers are likely to resist offloading cattle, which usually happens when the fat price drops.

Availability

Going forward, it is unlikely that prices will drop much further given the cattle availability of cattle across Europe and Irish beef production forecast to contract further following a 4.5% decline in 2023.

Traditionally, prime cattle availability drops in the summer months, with limited cattle in sheds and cattle at grass not quite ready, finishers will be hopeful of a lift in prices. Especially for those who bought expensive store cattle this spring.

Cull Cows

Cull cow prices remain strong with R4L prices sitting around 410p/kg.

Seasonal demand will influence trade for cull cows in the coming months, as we move into BBQ season, with demand looking to be higher in comparison to the wet summer of 2023 and the Euro 2024 football competition set to drive demand for grilling products.

While processors will be very conscious that greater demand for cheaper cuts such as burgers could create carcass balance issues; this is where good nationwide marketing campaigns can have a real effect in subtly drive up demand for higher value cuts of meat.

Grazing Cattle

With the big spring store cattle sales now behind us, numbers are dropping at weekly sales with less short keep cattle available.

'Grass fever' has hit the store ring with improved grass growth improving demand for grazing types. However, several markets have reported a slight easing in trade which is most probably linked to a drop in finished price. Prices remain strong for heavier stores.

Big Beef Roadshow

Funded by the University Innovation Fund (UIF), SAC Consulting's Big Beef Roadshow, will take place on the 11th of June at Knockenjig, Sanquhar, Dumfriesshire by kind permission of the Walker family.

The meeting will focus on timely and topical discussions on herd fertility, feed efficiency, animal health and welfare, and an update on cattle EID and the outlook for the beef market.

Local vets from SRUC and SAC consultants, will lead technical speaker sessions in the morning, with a farm tour in the afternoon. For more information visit:

<https://www.eventbrite.co.uk/e/the-big-beef-roadshow-tickets>

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Scotland prime cattle prices (p/kg dwt) (Source: drawn from AHDB and IAAS data)

| Week Ending | R4L Steers (p/kg dwt) | | | -U4L Steers | | | Young Bulls -U3L | | Cull cows | |
|-------------|-----------------------|----------------|----------------------|-------------|----------------|----------------------|------------------|----------------------|-----------|-------|
| | | Change on week | Diff over North Eng. | | Change on week | Diff over North Eng. | | Diff over North Eng. | R4L | -O3L |
| 04-May-24 | 495.7 | 0.2 | -3.6 | 494.5 | 1.4 | -2.3 | 483.9 | 1.2 | 408.4 | 378.8 |
| 11-May-24 | 497.3 | 1.6 | 0.6 | 496.3 | 1.8 | -3.2 | 485.5 | -3.7 | 409.5 | 381.7 |
| 18-May-24 | 494.2 | -3.1 | -5.3 | 495.2 | -1.1 | -3.1 | 481.8 | -7.9 | 410.1 | 383.9 |

Sheep

Lamb Marketing Roller Coaster continues to gain strength as we transition onto new season lambs. The week ending 18th May had an SQQ of £9.27/kg...

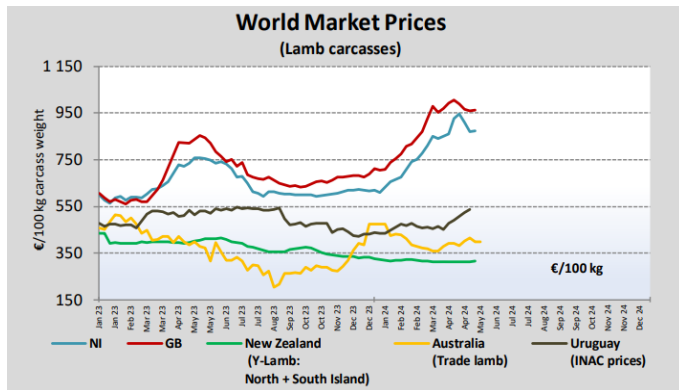
- 18.4p/kg rise on the week
- 184p/kg rise on the year!

With global supplies tightening, and the Muslim festival of sacrifice (Eid-al-Adha or Qurbani) approaching on the 16th – 18th of June. When will the heat of this trade cool off?

Global Prices For the week ending 18th May, the GB lamb price stood at €9.78/kg, which was €0.15/kg higher than the French price (€9.63/kg), and a whopping €6.26/kg higher than the NZ price (€3.52).

Beef and Lamb NZ have predicted a 54% decrease in profit for many NZ sheep farms due to the poor lamb price. This has largely been due to low domestic demand and poor export trade coupled with lower carcass weights due to drought conditions. In addition to which, as the Chinese market has favoured Australian lamb; this has vastly reduced the volume exported to China from New Zealand.

The poor lamb (and mutton) prices in NZ, and the effect on cash flow, are now flowing through to low returns on breeding and feeding stock.



Source: European Commission

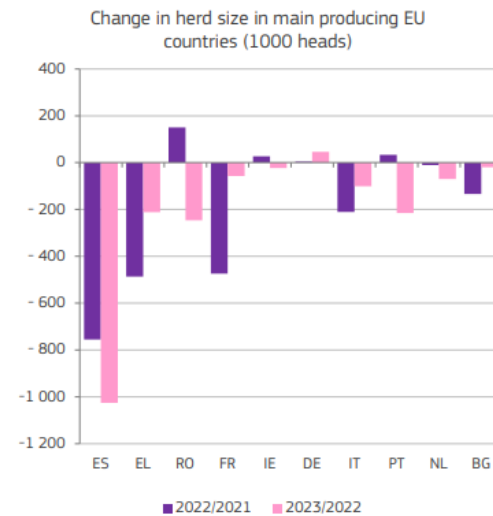
In contrast, the Australian flock is going from strength to strength, with the 2024 crop of lambs predicted to show a record production level, potentially 20%

higher than the 10-year average, showing a rise of 4% on 2023 to reach 621,000 tonnes. However, the flock is forecast to decrease by 3% in 2024. The main export markets remain in China, USA, Malaysia, and the Middle East.

Bearing in mind, there is a free trade agreement between Australia and the UK, although imports to the UK for January-March 2024 were 3,500 tonnes, 65% higher than 2023, they were lower than 2022. Showing the markets closer to home are more favourable.

European Sheep Trends The European Commission has recently published their [Spring Short Term Outlook](#). The report forecasts that the UK export market will remain stable, while the demand from the Middle East will reduce due to favouring Australian lamb. Imports to the EU, have risen by 2.2% in 2023, largely from UK and NZ, with a further increase of 2.5% forecasted for 2024.

Overall, the European flock is in decline, with the Spanish flock leading with a forecasted reduction of 1 million head or 6.1%. Notable as the Spanish flock currently accounts for 25% of the EU sheep meat production.



Source: DG Agriculture and Rural Development, based on Eurostat

[Kirsten Williams](#); 07798617293

| Week ending | GB deadweight (p/kg) 16.5 – 21.5kg | | | | Scottish auction (p/kg) | | | | Ewes (£/hd) |
|-------------|---------------------------------------|----------------|--------------|---------------|-------------------------|----------------|-----------------|-----------------|-----------------|
| | R3L | Change on week | Diff over R2 | Diff over R3H | Med. | Change on week | Diff over stan. | Diff over heavy | Scottish All |
| 04-May-24 | 836.6 | -19.9 | 5.3 | 1.8 | 380.50 | 31.8 | 25.1 | 3.9 | 132.28 |
| 11-May-24 | 905.9 | 69.3 | -9.4 | 5.1 | 426.30 | 45.8 | 9.8 | 3.1 | 120.65 |
| 18-May-24 | 926.4 | 20.5 | -1.9 | 2.8 | 431.20 | 4.9 | 28.3 | 16.2 | 116.27 |

Deadweight prices may be provisional. Auction price reporting week is slightly different to the deadweight week. Source: AHDB and IAAS Standard weight 32.1 - 39.0kg; Medium weight 39.1 - 45.5kg; Heavy 45.6 - 52.0kg

Note: From 11th May, prices transition to new season lambs

Sector Focus: Agricultural Support

Direction of travel for agricultural support

Since leaving the EU in 2020, each of the UK's four nations have been working to develop their own systems of agricultural support to replace the CAP (Common Agricultural Policy). The direction of travel for Scottish policy is laid out in the [Vision for Agriculture](#) with four key objectives of:

- Supporting food production
- Enhancing biodiversity
- Adapting to climate change
- Ensuring a Just Transition.

The [Agriculture and Rural Communities Bill](#) is now at Stage 3 of the consultation process, having incorporated amendments from farming bodies in Scotland. At Stage 3, MSPs can propose further "amendments" before votes are cast on whether or not the Bill should be passed. However, while the Bill forms a framework of principles under which agricultural and rural support will be developed; details of scheme design and implementation are still in progress.

Included in this policy formulation is consideration of the suitability of continuing to use the three region system in allocating Tier 1 payments, given the evolved priorities of targeting payments since the existing model was developed. While food production is still a key outcome of Tier 1, revision or reform might be considered more appropriate for reflecting farming's contribution to other policy outcomes, such as climate and biodiversity management.

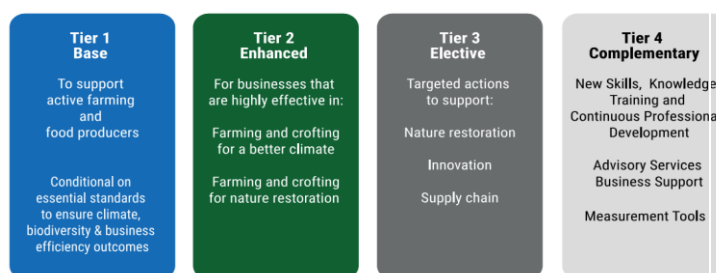
New payment structure & allocations

The system will move from two to four tiers of payments (Figure 1). Tier 1 replacing the existing Basic Payments (including conditionality), and Tier 2 providing 'enhanced' payments for climate, nature, and other benefits. These will comprise of at least 70% of future support, with the remaining amount

allocated to Tiers 3 and 4 for additional and targeted environmental, social, and business initiatives.

While the decision to retain a similar and equivalent Basic Payment Scheme beyond 2026 is welcomed by the farming sector especially given that Tiers 3 and 4 will open up funding for the historically less supported but important sectors in Scotland such as pigs, poultry, horticulture, and potatoes; environmental groups argue that a greater share of payments should be designated to climate and nature outcomes. However, the degree of environmental conditionality across tiers and schemes is yet to be determined and could still reflect this ambition.

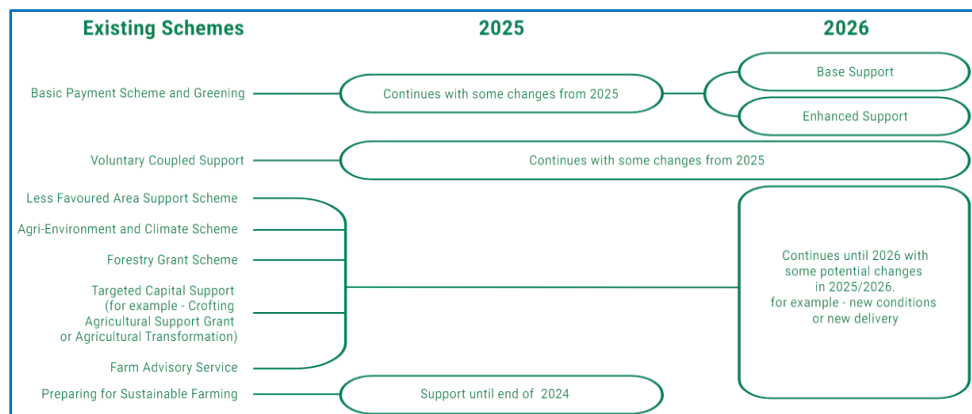
Figure 1: Tiers of future agricultural support in Scotland



Outstanding concerns and issues

One of the biggest concerns around future support is how the details of schemes and applications will affect producers, particularly smaller producers where it may create a disproportionate burden for implementation.

Another key concern is the risk of green investment encouraging agriculture to sell carbon assets and/or data, particularly with increasing pressure from supply chains for [Scope 3 emissions reporting](#). With technology essential to create an enabling environment for innovations and reporting on biodiversity and environmental impacts for the sector, it could be argued that private investment would be better channelled to technological transformation opportunities.

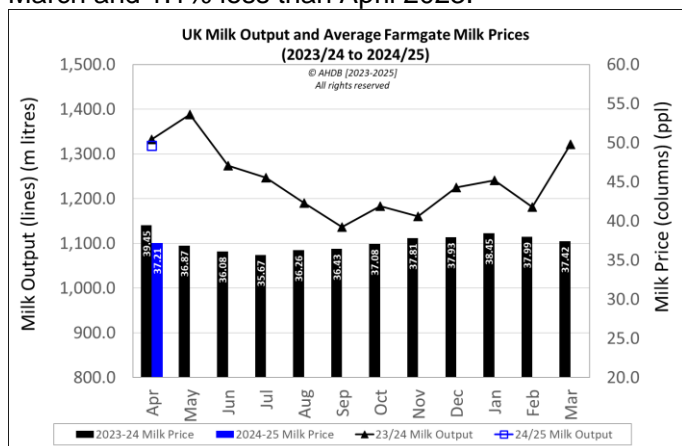


Lastly, in the consultation stage of the Agricultural & Rural Communities Bill, there was also division in respondents as to whether non-agricultural practices on agricultural land (e.g. woodland, peatland management) should receive support or not.

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GB milk production data

The peak production time has now passed, with a daily high of 37.33mlitres (for GB) on the 12th of May. This compares to a high of 37.57mlitres on 5th of May 2023. The latest GB monthly milk production data from AHDB is estimated at 1,075mlitres for April, 0.9% down on the March volume. Daily deliveries were 36.57mlitres for the w/e 18th May, just 0.2% below the previous week and 0.5% down on the same week in 2023. The UK milk volume for April was 1,318mlitres, 0.7% less than March and 1.1% less than April 2023.



Farm-gate prices

The Defra average farm-gate milk price for April was 37.21ppl, 0.21ppl down on the March price. The most up to date milk prices from the main Scottish milk buyers available at the time of writing are shown below.

| Milk Prices for May/June 2024 Scotland | Standard Ltr ppl |
|--|------------------|
| First Milk ² | May 39.50 |
| Müller - Müller Direct - Scotland ^{1,3} | Jun 38.00 |
| Grahams ¹ | May 36.00 |
| Arla Farmers ² | May 40.45 |
| Lactalis / Fresh Milk Co. ² | May 38.50 |
| Yew Tree (A volume litres) ¹ | May 37.00 |

¹ Liquid standard litre – annual av. milk price based on supplying 1m litres at 4.0% butterfat, 3.3% protein, bactoscan = 30, SCC = 200 unless stated otherwise.

² Manufacturing standard litre - annual av. milk price based on supplying 1m litres at 4.2% butterfat, 3.4% protein, bactoscan = 30, SCC = 200 unless stated otherwise.

³ Includes 1.00ppl Müller Direct Premium. Haulage deducted depending on band for 2023 vs 2021 litres, ranging from -0.25 to -0.85ppl.

Dairy commodities & market indicators

The latest UK wholesale dairy commodity prices were all up from the previous month. The lower-than-expected milk volumes at this time of year and concerns about future stocks stimulated more buying activity.

Sentiment is more positive now, highlighted by the latest Global Dairy Trade (GDT) auction returning its 4th increase in a row, with the average price across all products sold reaching US \$3,861/t. For the first time in four months, the Milk Market Value indicator increased, up 0.86ppl to 36.54ppl for May.

| UK dairy commodity prices (£/tonne) | May 2024 | Apr 2024 | Nov 2023 |
|-------------------------------------|----------|----------|----------|
| Butter | 5,080 | 4,910 | 4,580 |
| Skim Milk Powder (SMP) | 2,010 | 2,000 | 2,280 |
| Bulk Cream | 2,104 | 2,037 | 1,985 |
| Mild Cheddar | 3,540 | 3,470 | 3,400 |
| UK milk price equivalents (ppl) | May 2024 | Apr 2024 | Nov 2023 |
| AMPE | 37.08 | 36.14 | 37.67 |
| MCVE | 36.40 | 35.57 | 36.53 |

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Grass growth and mineral warning

Grass growth rates have rocketed, now exceeding those at this time last year, and are also higher than the 5-year average (GrassCheck GB). The current daily grass growth rate on dairy farms was 91.7kg DM/ha for the w/b 20th of May. Across Scottish dairy, beef and sheep farms, daily grass growth was 79kg DM/ha. Nutritional quality is good, with crude protein content at 18.1% and ME at 11.1MJ/kg DM. With favourable weather for rapid growth, the challenge is maintaining grass quality for the next grazing round and mowing. Topping swards may be necessary to achieve the desired residual. For a 650kg cow, current grass quality should support M+19 litres (based on 16kg grass dry matter intake).

Given the wet winter and spring, mineral levels in grass and silage may be lower this year, leading to increased risk of deficiency. Grassland that has been underwater has lower oxygen levels and therefore reduced mineral uptake from the soil. Levels of antagonists such as iron and molybdenum may also be higher, reducing absorption of essential trace elements in the gut (particularly copper). Therefore, it is worth getting fresh grass and silage made this summer analysed for minerals to ensure that current supplementation is meeting requirements. If in doubt speak to your nutritionist about a mineral audit, and blood testing can also be useful to confirm any deficiencies in livestock.

Global Outlook

Farm-gate milk prices are likely to be slower to recover than previously thought, according to a recent report by Rabobank. Chinese net dairy imports are expected to fall by 8% in 2024 (mainly from declines in SMP), and with their growing domestic production combined with weaker global demand, global milk price recovery has slowed. High interest rates and inflation continue to be above target in many countries, putting pressure on consumer spending. However, exports of butter and cheese are faring much better than SMP and current levels of demand are expected to be maintained. With prices for straights such as soya and maize looking to remain stable or even fall in the second half of 2024, margins over purchased feeds should improve from where they were six months ago.

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Sector Focus: Carbon Calculators

Carbon calculators update

Carbon calculators help farms to estimate their greenhouse gas (GHG) emissions and highlight ways to reduce them, a hugely important tool towards tackling agricultural emissions and achieving net zero for the whole economy. UK farmers have been encouraged and incentivised to undertake farm carbon audits for a number of years. However, farmers have been feeding back that the calculators on the market can return different results for the same farm, leading to questions about their consistency and trustworthiness.

In January 2024, the UK Department for Environment, Food and Rural Affairs (DEFRA) published a report titled '[Harmonisation of Carbon Accounting Tools for Agriculture](#).' The report shortlisted six calculators which are used most by British farmers. The report investigated what drives the differences in their results, with the goal of 'harmonising' or bringing them in line with each other. The six tools were each tested on 20 farms covering the nine most common types of British farming.

How do they differ?

The report confirmed that the tools can indeed output different emissions estimations for the same farm. These differences are a result of factors including the boundaries on which parts of the farm business are included in calculations, the precision to which calculators use emissions factors (i.e. reference figures used to model farm emissions), how soil carbon sequestration is handled, and the 3rd-party review standards to which they align. Because these differences in methodology are more relevant to some farming types than others, there is greater divergence among some types of farms for example:

- those with organic and peaty soils
- where more soya feed is used
- lowland beef and sheep enterprises

but more consistent results among others e.g. dairy systems.

Which is right for my farm?

If different calculators give different results, which can a farmer trust as a decision-making tool? Whilst differences persist, the report highlights that these calculators are still trustworthy and following their recommendations will help farmers reduce emissions. The climate crisis requires urgent action and farmers should not delay in engaging with these tools. However, it is worth taking the time to make an informed decision. Farmers should ask questions about how suitable a calculator is for their type of

farming and the outcomes they are looking to achieve. While reducing emissions is the goal of engaging with these calculators, achieving more efficient use of resources and farm inputs boosts the profitability of farm enterprises. Therefore, farmers should ask their farm advisor if they are aware of, and have considered, the differences between the tools available for carbon audits.

| Model farm | Mean farm emissions (t CO ₂ e/farm) | Emissions of max. relative to min. |
|------------------|--|------------------------------------|
| Cereals 1 | 1,636 | 175% |
| w/C stock change | 1,661 | 220% |
| Cereals 2 | 820 | 128% |
| Gen. crop. 1 | 336 | 171% |
| w/C stock change | 1,245 | 1,093% |
| Gen. crop. 2 | 4 | 129% |
| Horticulture 1 | 174 | 157% |
| Horticulture 2 | 1,994 | 238% |
| Pigs 1 | 716 | 133% |
| Pigs 2 | 2,758 | 250% |

Figure 1: Excerpt from a results table of the Defra report For different farm types, a percentage difference for the calculator which returned the highest and lowest emissions estimate.

Percentages in bold denote farm types where the highest value was over twice as high as the lowest; Italics denote those for which high was less than 50% higher than low.

What happens next?

While farmers will get better results from learning about the inputs, methodologies, and outputs of these calculators; it is the companies behind the calculators who have the responsibility of improving the accuracy of their methods and making sure all tools on the market are robust and trustworthy. The Defra report makes several asks, including for industry and government to define which parts of farm businesses should be included in farm-level assessments and for calculators to increase transparency to drive increased understanding of emissions sources.

Several tools have published articles which address the recommendations made in the report head-on, tracking progress and giving timelines for when they hope to fully comply with the report's standards. As calculators take action to implement the recommendations, it is reasonable to expect more consistency between results in the future. As before, the most important thing is for farms to choose a calculator which suits their enterprise type and stick with the same one, as this is the only way to establish a robust baseline and monitor change over time.

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Inputs: Forage First Sucklers

Forage First Suckler Systems

The new Forage First Suckler Systems guide by SAC Consulting, funded by the University Innovation Fund (UIF), provides advice on how to develop a low cost forage based suckler cow system that achieves high utilisation of grazing resources, optimises output, productivity, and reduces wintering costs to promote profitability.

Optimising production off forage

Pasture can meet the nutritional requirements of a suckler cow at all stages of production, support growth rates of over 1.3kg/day in calves to weaning, and greater than this, in growing and finishing stock to finish them at 18 months with the right genetics.

To achieve a low-cost forage only suckler system, whilst optimising output and profit per hectare, producers should:

- Best match animal demands with pasture supply by calving in the spring.
- Run a tight calving period of 6-9 weeks.
- Use rotational grazing to gain control over pasture, optimise utilisation and quality, and to extend the grazing season.
- Review lowest cost wintering options.
- Run appropriate genetics that suit the system.

Matching supply and demand

Aim to time calving, mating and lactation with peak pasture growth in spring and summer, in order to meet the highest demands off pasture. When pasture growth drops in the autumn, so does the feed demand of the cow post weaning.

It costs £0.44 per day more (34%) to meet the nutritional requirement of a lactating cow (12.9kgDM, £1.71/day) compared to a dry cow (9.5kgDM, £1.27/day) on a silage diet. Therefore, calving should be timed to best match spring pasture growth so that cows can be turned out / stocked to calve outdoors on sufficient pasture covers (5-6cm) to avoid the need to supplement.

Tackling winter costs

Set stocking is wasteful providing poor pasture utilisation and control over quality. To extend the grazing season and reduce wintering costs, cattle must be on a rotational grazing system as this optimises production per hectare whilst also carrying more covers into the autumn.

Housing costs aside, winter feed costs for many conventional systems are crippling with a 180-day winter costing as much as £229 per cow in silage alone based on £26/t fresh weight.

To make suckler cows profitable, we must:

1. Extend the grazing season to reduce the winter feeding period.
2. Assess winter feeding strategies to reduce feed and housing costs for example through the use of deferred grazing, bale grazing or forage crops.

Extending the grazing season

In the Autumn, every day cows are still out grazing at pasture saves £1.27 per cow in silage alone. For a 100-cow herd this amounts to £127 and another £18.30 in straw, if housed on bedded courts.

Putting up an electric wire to sub-divide grazing into 1-3 day shifts pays dividends as an extra week outside for a herd of 100 cows would save £1,017 in silage and straw alone. Even better - daily shifts will both improve utilisation and reduce the poaching risk through reduced grazing duration.

Planned deferred grazing involving setting aside (stock piling) pasture in the summer to allow covers to build (+15cm) for grazing in the autumn/winter is allowing a growing number of farms to dramatically reduce their wintering costs. However, deferred grazing is only appropriate if soil type and rainfall are suitable for winter grazing without causing damage to the existing sward or soil.

Strip or paddock grazing reduces wastage making the pasture go further. If the acreage is limited, grazing days can be extended by supplementary feeding including placing bales out prior to winter.

The shut off date affects both yields and feed quality:

- Shutting off in spring/early summer maximises yield but sacrifices quality. 'Standing hay' is best suited to dry cows. Shutting off in Spring Summer is poor use of improved ground due to loss of production potential, so more appropriate for hill ground.
- Shutting off from July onwards/post silage/grazing generates lower yields but a higher quality feed. Ideal for dry cows and better suited to youngstock.

Both digital and physical copies of the guide are now available. Email livestock@sac.co.uk to get your free copy.

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Management Matters: Land Register of Scotland

Who owns Scotland?

The Registers of Scotland (RoS) is currently undertaking the mammoth task of digitally registering Scotland's titles to add them to the Land Register of Scotland, which was created in 1981. The Land Register replaces the General Register of Sasine which was created in 1617 and holds many historical titles.

The Land Register

The Land Register can be accessed online and is free to view at scotlis.ros.gov.uk. Properties can be searched for by postcode, title number or by map, and digital titles can be bought for a small fee through the register website.

Digital Registration

The purpose of moving to a digital register has many positives. Older titles quite often only have a written description with no maps and use outdated terminology which can make modern interpretation very challenging.

A digital register, using Ordnance Survey mapping, ensures that, rather like a jigsaw puzzle, all the registered parcels of land fit in beside each other. It also allows for an opportunity to merge titles in the case where a business has bought several land parcels over decades of time, or indeed separate them, if that is what is required.

It then makes matters such as succession and selling a much smoother process in respect of the legal aspect as solicitors have access to an up-to-date register which can make transactions much easier.

Land Register submissions

There are several ways a property can be added to the Land Register. It can be triggered when a property is sold or transferred which has been happening since the late 1990s.

Where properties have been in the family for generations, such as estates and farms, owners can volunteer to register their property. RoS are offering a discounted registration rate to encourage landowners to consider this option.

Finally, it is understood that the RoS are working through the Sasine Register to move properties on to the Land Register. However, this route will be a lengthy process and is expected to take many years.

Registration considerations

It should be known that there are additional costs when undertaking the voluntary registration. There will be the preparation of digital maps and the fee for a solicitor to submit to the RoS.

The fee for voluntary registration is calculated on the current value of the land and can range from £60 to a staggering £6,190.

Understandably, the cost of registration can be inhibitive. However, it should be noted that for many landowners their property is their biggest asset and registration provides a degree of protection. However, there have been cases where land has been registered, and occasionally, the boundary has been incorrect necessitating the neighbouring property to dispute the accuracy of the registration, resulting in additional legal costs.

Registering your land can ensure peace of mind that your boundaries are precise, but it can also guarantee that the land is in order for future generations to inherit.

For further information on the legislation, registration fees or to see if your land is on the Land Register please go to: www.ros.gov.uk

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Key Economic Data

| General Indicators | | Price indices for March 2024 (Defra 2020 = 100) | | | |
|-------------------------|-------------------------|---|-------|----------------------|-------|
| | | Output Prices | | Input Prices | |
| Base interest rate | 5.25% (5.0% 22 June 23) | Wheat | 111.2 | Seeds (all) | 109.4 |
| ECB interest rate | 4.0% (3.75% Aug 23) | Barley | 137.8 | Energy | 159.1 |
| UK (CPI) inflation rate | 2.3% (target 2%) | Oats | 192.0 | Fertiliser | 155.9 |
| UK GDP growth rate | 0.6% (Q1 2024) | Potatoes | 241.8 | Agro chemicals (all) | 116.9 |
| FTSE 100 | 8,231.25 (30/05/2024) | Cattle and Calves | 142.1 | Feedstuffs | 129.2 |
| | | Pigs | 132.4 | Machinery R&M | 124.9 |
| | | Sheep and Lambs | 166.8 | Building R&M | 136.9 |
| | | Milk | 130.8 | Veterinary services | 109.7 |

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