



UK Government

Farming Roadmap 2050

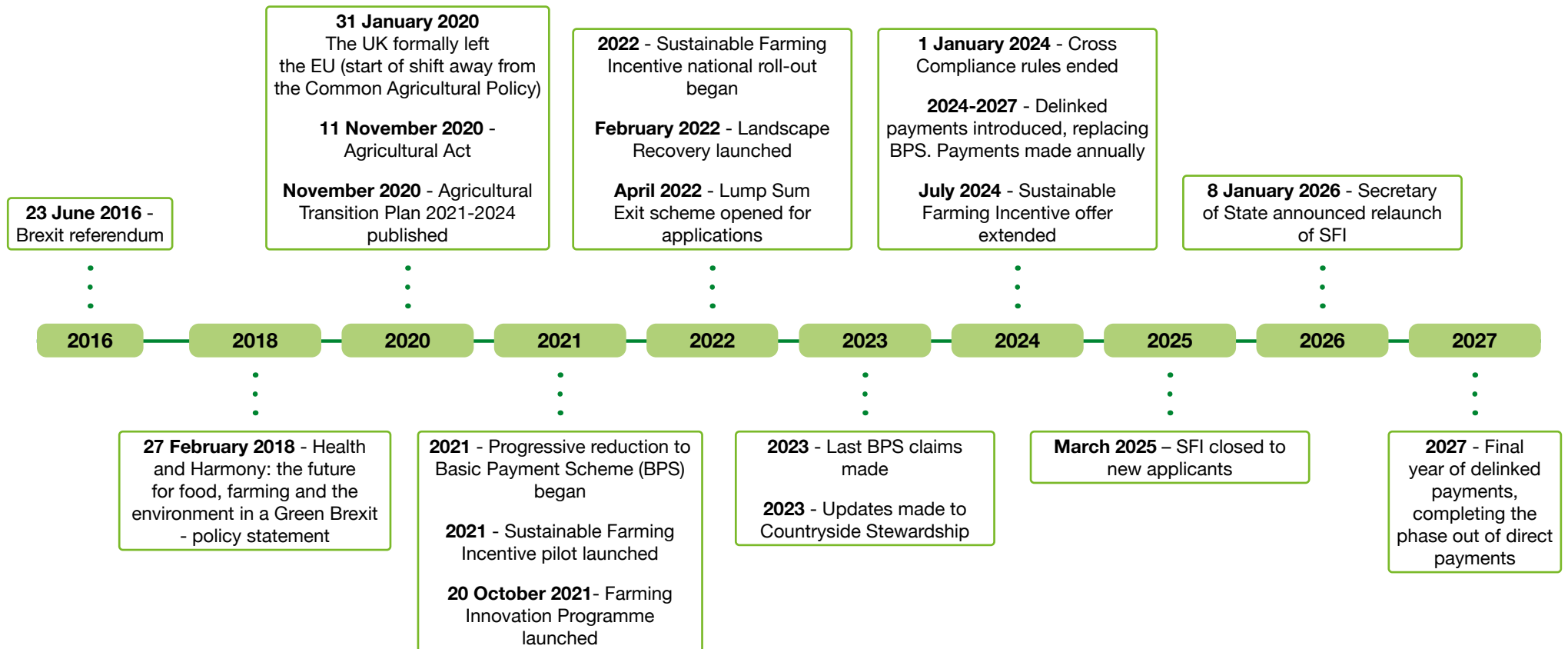
Growing England's Future

Farming Roadmap Evidence Annex

June 2026

Policy context: From direct payments to paying for environmental outcomes

Since leaving the EU, direct payments based on land area have been replaced by a system that increasingly links funding to environmental outcomes



Policy context: Numbers of agri-environment agreements have increased

Income from schemes has increased. Stakeholders call for clear and consistent policy direction

Agri-Environment Schemes

As of December 2025, the total area covered by agri-environment scheme (AES) agreements in England was estimated to be 6.1 million hectares, which is 69% of the utilised agricultural area.¹

SFI Schemes	October 2023	April 2024	October 2024	April 2025	October 2025
SFI23	58	13,900	25,200	25,200	25,200
SFI Expanded Offer	Not applicable	18	900	14,000	19,300

Internationally, G7 and G20 countries have committed to farming systems where productivity and environmental delivery support one another.² To support this, many are moving to policies that support environmental and resilience benefits.³

Average income from AES

Average income across all farms from agri-environment activities has increased each year since the start of the transition, from £5,300 in 2020 to £21,100 in 2024. The average almost doubled between 2023/24 and 2024/25 (N.B farm business statistics only cover farms with a Standard Output of at least £21,000).^{4, 5}

What our stakeholders told us

- Policy and schemes need to be more consistent, joined-up, clear, and long-term.
- Scheme inflexibility, unequal accessibility, and inconsistent communication make long-term planning difficult.
- Regulation needs to be clearer and simpler. Regular reviews need to ensure that it is joined-up, proportionate, and fit-for-purpose, supported by advice and guidance.
- Policy, regulation and targets should be based on robust data.
- A long-term stable vision is needed to enable business planning and investment. This includes immediate and long-term clarity on policy direction.

“We can’t get somewhere if we don’t know where you [Defra] want to go”
(Agricultural contractor)



Economic context: Agri-food makes a significant contribution to the national economy

Agriculture and agri-food sectors are economically significant. Stakeholders call for fairer supply chains

Agriculture key statistics



2025 - contributed
£15.9 billion
to the UK economy⁶



17 million hectares (69% of
the UK land total in 2024)⁸



453,000 jobs (2024)⁷



Production to supply ratio –
65% for all food, **77%** for
indigenous foods (2024)⁹



209,000 farm holdings⁸

UK Agri-food sector key statistics



2023 - £153.2 billion
contributed to the UK
economy¹⁰



2025 – 4.1 million people
employed (11.7% of GB
employment)¹⁰



**2024 - The value of food
and drink exports was
£24.6 billion¹¹**

What our stakeholders told us

- Supply chains should be fair, transparent and resilient, aided by fair pricing and returns.
- Shorter, more local supply chains with improved collaboration and reduced supermarket power would help build resilience and increase profitability.
- Fair international trade agreements should ensure imports meet domestic standards and enable farmers to compete on a level playing field.
- Public procurement of domestic and high standard produce will increase market access and support local food systems.

“Farmers have to use every square metre of their land to make enough money to live on because supermarkets keep prices so low”
(Farmer)



Economic context: Price volatility

Changes in input and output prices do not always reflect changes in profit

Input and output prices

Input costs rose faster than output prices from 2020 to 2022, before output prices began to pull ahead in late 2023 as input costs fell. Following recent rises in input costs, the gap between output and input prices has now almost closed.¹²

Fluctuations in output and input prices indices do not necessarily correlate with profits. This is because, in addition to prices, volumes of inputs and outputs impact profits. For example, despite output price growth outpacing input price growth from late 2023, profits dropped for most farms in 2023/24.¹²

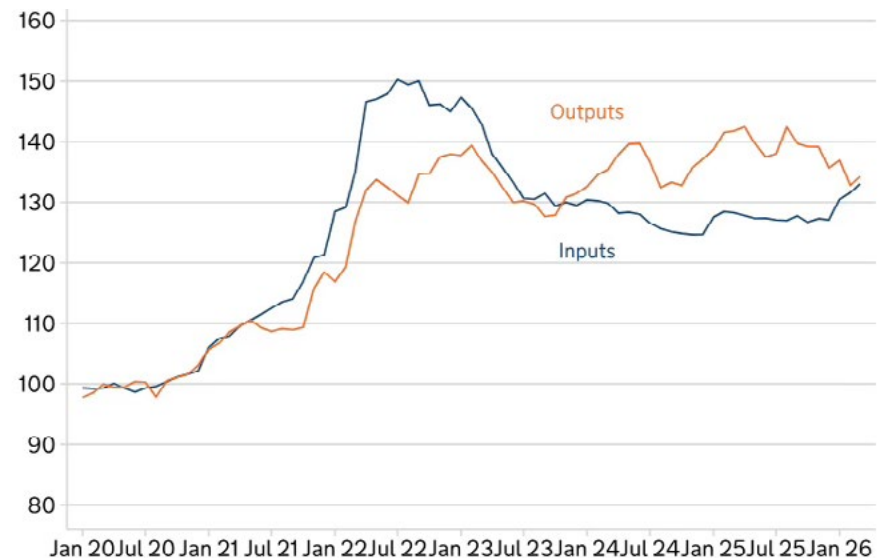
Geopolitical instability

UK farming operates in global markets with significant trade flows. Disruption caused by conflicts, including the Russia-Ukraine conflict and Middle East instability affects both global input and output prices. Fertiliser and energy prices have seen significant rises since 2020.¹²

Imports and exports

In 2024, the total value of exports of food, feed and drink was £24.6 billion. The value of imports of food, feed and drink was £64.1 billion.¹¹ Over the long term, after adjusting for trade price inflation, the trade gap (the difference between import and export values) has widened by 22% since 2005.¹³

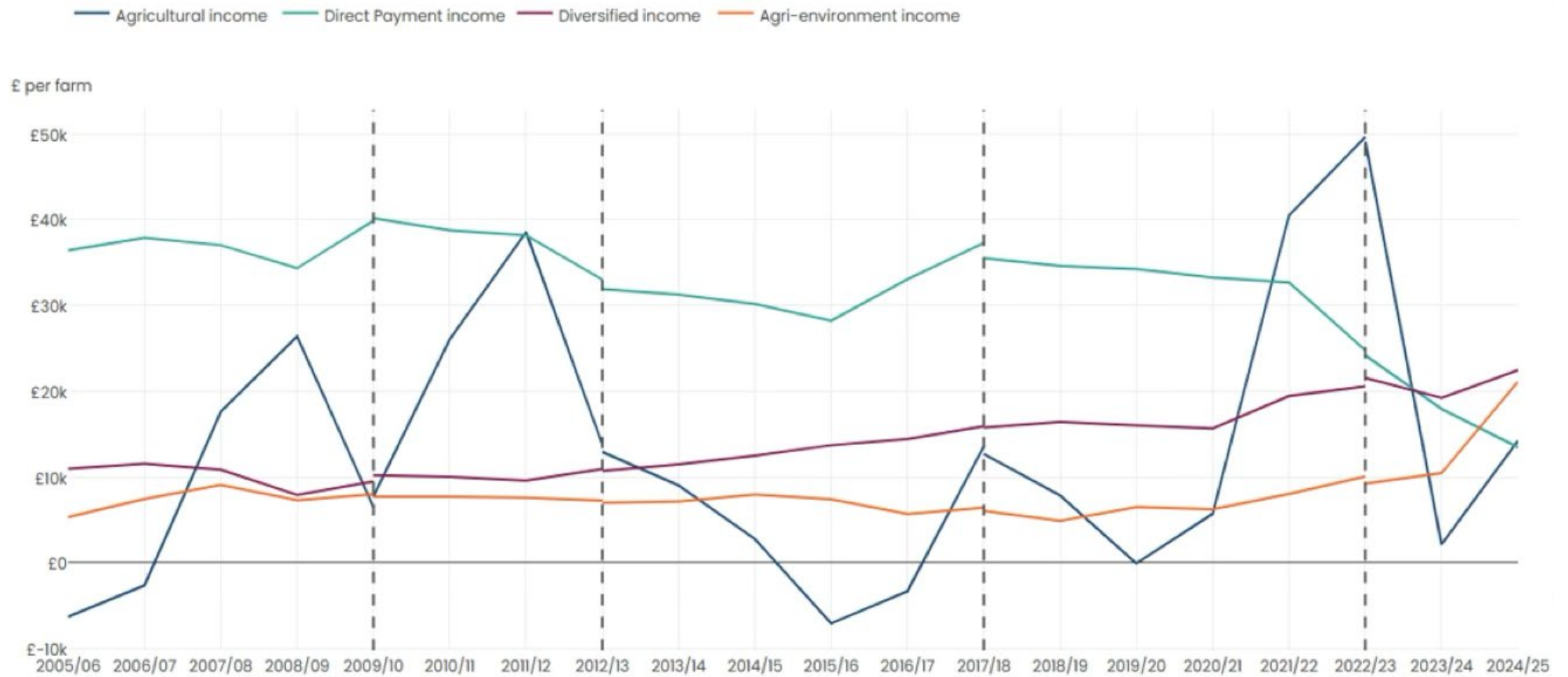
UK monthly price indices for agricultural outputs and inputs to March 2026 (2020=100).¹²



Profitability: Farm Business Income

Average income from agriculture continues to be volatile

Average Farm Business Income (as a measure of profit in real £ per farm) from agriculture, diversification, AES and Direct Payments for all farms in the Farm Business Survey.¹⁴



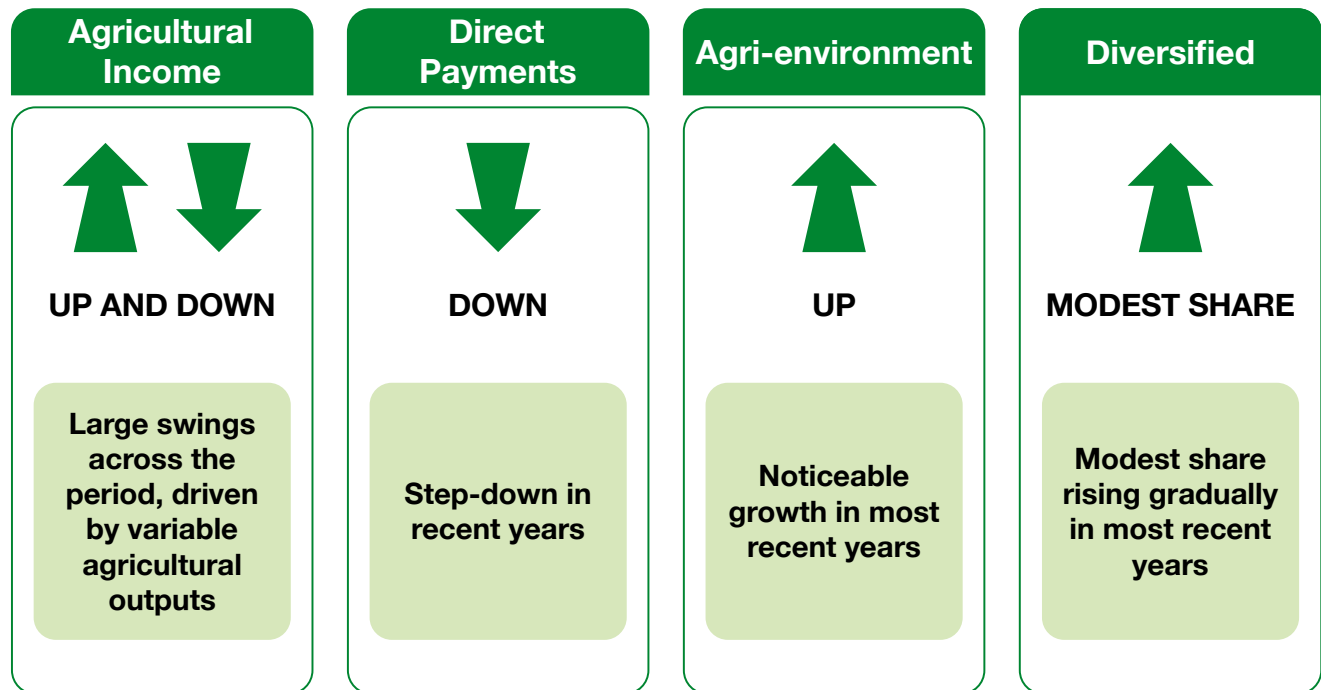
Profitability: Profit remains volatile

Profit remains volatile and differs a lot between sectors

What our stakeholders told us

- Profitability is central to building resilient farm businesses and a resilient sector
- Food production needs to be reliably profitable. Many felt diversification should not replace core farming while others saw it as a helpful way to improve profitability and deliver environmental benefits.
- Nature markets are not yet fit for purpose, due to a lack of regulation, unequal access and inconsistent metrics.

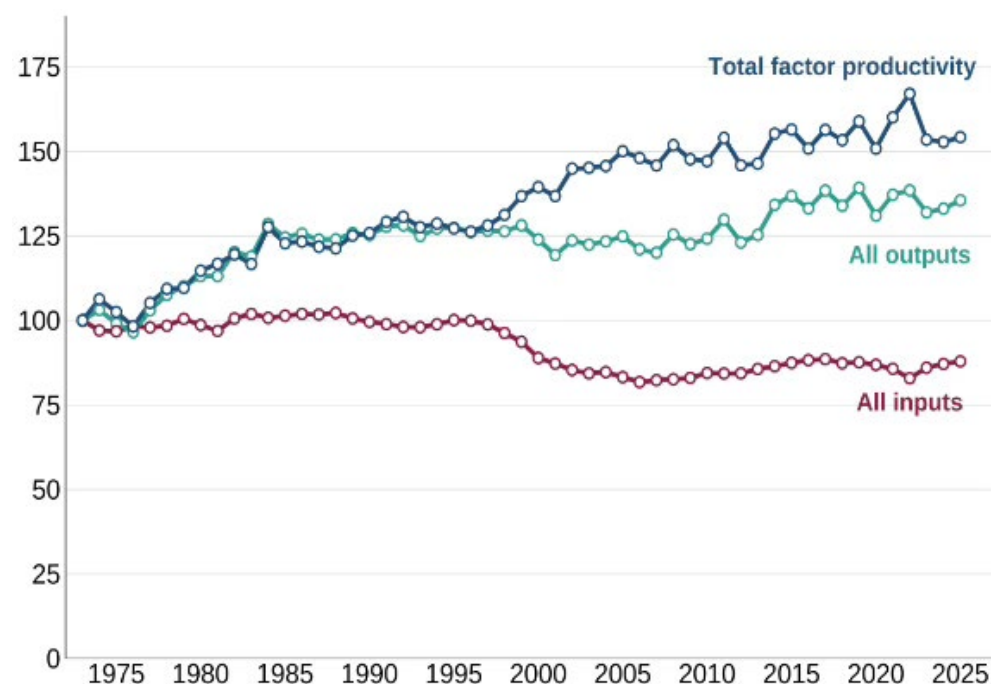
- Income from agriculture remains highly volatile and is strongly influenced by global swings in input and output prices.
- Profit (Farm Business Income) varies widely across sectors, with some farm types consistently earning much more than others.



Productivity: Productivity has increased over time

Increases are driven by higher outputs and lower inputs

Total Factor Productivity of agriculture in England has increased over time 1973-2025 (1973=100)¹⁵



Total Factor Productivity (TFP) is a measure of how well agriculture turns inputs into outputs

- Between 1973 and 2025, Total Factor Productivity increased by 54.2%. This growth reflects an increase in the volume of all outputs by 35.5% and a decrease in the volume of all inputs by 12.1%.¹⁵
- Over the long term, productivity will need to grow further to meet environmental commitments and associated land use change whilst maintaining food production. Land Use Framework analysis indicates this is achievable with policy reform, better decision making and targeted assistance.¹⁶
- Evidence suggests UK Total Factor Productivity growth is below the EU and global average, although there are a range of data challenges in making consistent international comparisons.³
- Defra analysis suggests that offsetting the impact of land use change as required by the government's targets would require around 0.5% annual growth in agricultural output, which is broadly consistent with historic trends.¹⁷
- Short term movements in prices and yields make productivity figures volatile, even when the underlying efficiency of the farm has not changed.¹⁵
- Labour use continues to fall, meaning output per worker has risen.¹⁵



Productivity: Investment in machinery, technology and innovation

Spending on machinery is slightly lower than a decade ago, and tends to increase when farm profits are higher

- The total amount spent by farms in England on machinery was £2.3 billion in 2023/24, 3% lower than the 2014/15 value (in real terms). During this timeframe spend on machinery has fluctuated. In general, total machinery purchases and sales tended to follow a similar pattern to Farm Business Income, suggesting that higher incomes lead to higher levels of machinery purchasing.¹⁸

As of September 2025, Defra's Farming Investment Fund (FIF) Large Grants has paid out £37.1 million, and the Farming Equipment and Technology Fund has paid out £124.5 million.¹⁹

- Internationally, governments in countries such as South Korea, Japan, and Germany are investing heavily in smart farming, automation and Artificial Intelligence-enabled decision-making and improving data exchanges.³ Such investments can reduce the need for inputs, benefitting both productivity and sustainability. Whilst it is too early to know the impact of these programmes on productivity, they signal a shared direction of travel towards agricultural technology as a strategic investment.

What our stakeholders told us

- The definition of productivity was debated, with some stakeholders believing we should focus on food production and others believing farmers should reframe themselves around multifunctional land use.
- Technology has the potential to increase productivity, and automation can help address labour shortages, but affordability, accessibility, infrastructure unsuitability and skills gaps present significant barriers.
- Stakeholder strategies consistently underline productivity as essential for maintaining a competitive, secure and resilient food system, with many emphasising that it must be strengthened while also meeting environmental and social goals.

"In the next 25 years, if there's investment and research into improving practises and getting new technology out there, there is the capacity for farms to improve productivity"
(Young Farmer)



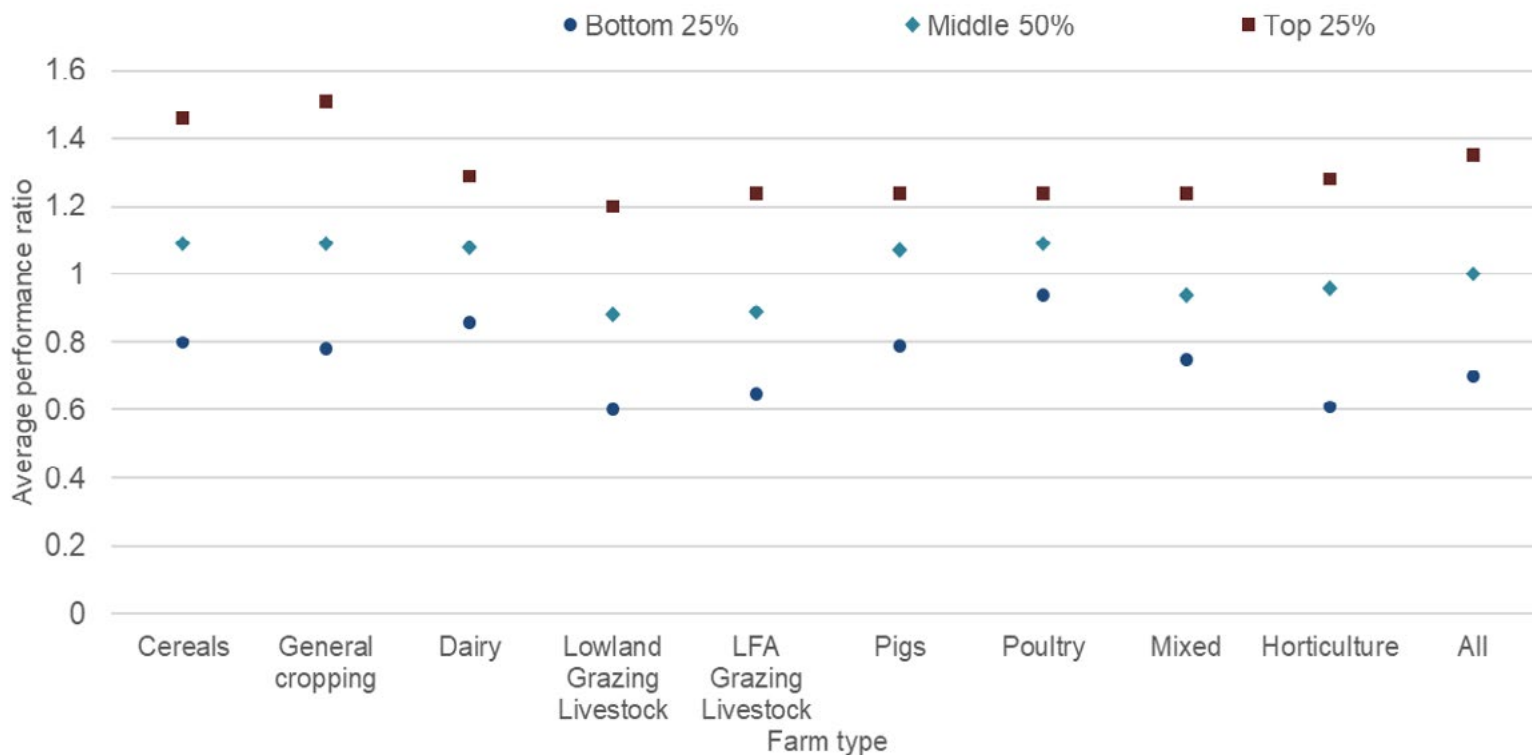
Performance: Farm business performance varies across the sector

Farm business performance varies by farm type

Performance ratios compare how efficiently farms turn inputs (like labour, feed and fertiliser) into outputs (like crops or milk).¹⁴

- A ratio of 1 means that a farm is producing the same amount of output as the amount of input (they are breaking even).
- Factors within farmers' control can have a significant influence on performance ratio. The comparison between the highest and lowest performers therefore highlights significant room for efficiency and profitability improvements across the sector.

Ratio of the Average Output and Input Costs for the Bottom 25%, Middle 50% and Top 25% of farms by farm type, England 2022/23 to 2024/25 (average).¹⁴

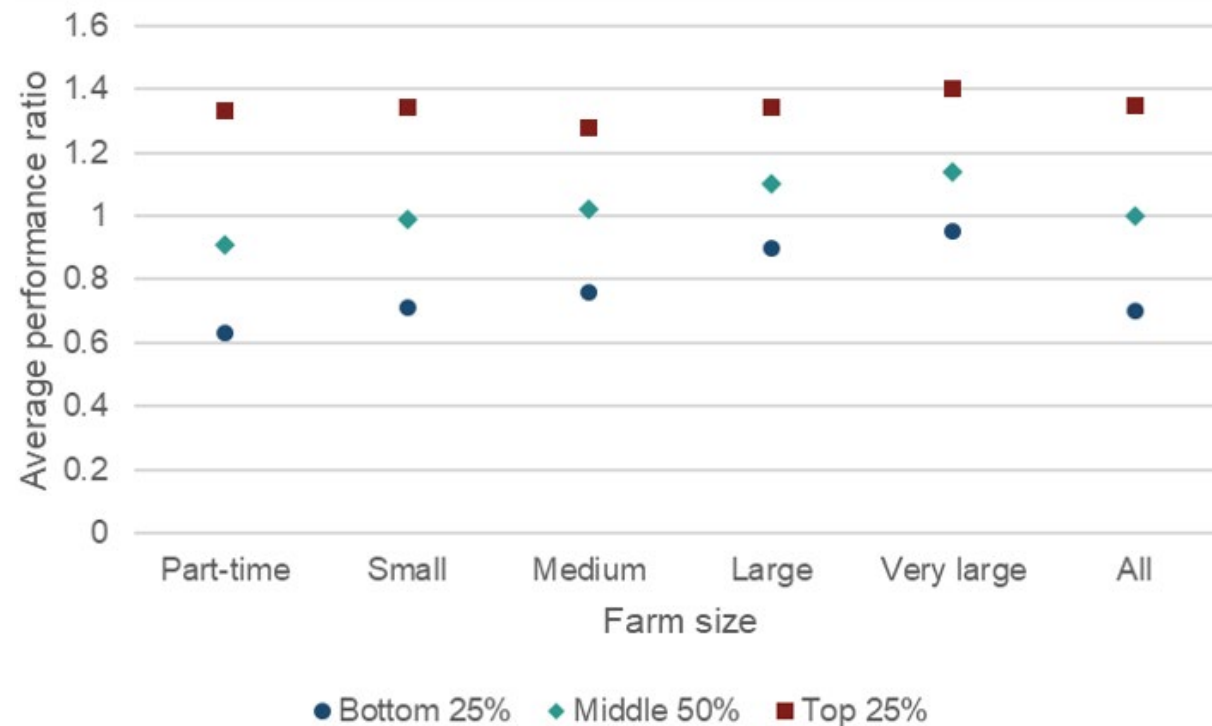


Performance: Farm business performance varies across the sector

Farm business performance varies by farm type

- Top performing farms are more effective in controlling overheads, spending proportionally less on fixed costs like machinery, and making greater use of contractors.^{20, 21, 22}
- High performing farms are more likely to undertake business planning and risk management practises, as well as making greater use of technical and business management advice. For example, in 2024/25, 24% of low performing farms used paid for technical advice, compared to 36% of top and middle performers.²³

Ratio of the Average Output and Input Costs for the Bottom 25%, Middle 50% and Top 25% of farms by farm size, England 2022/23 to 2024/25 (average).¹⁴

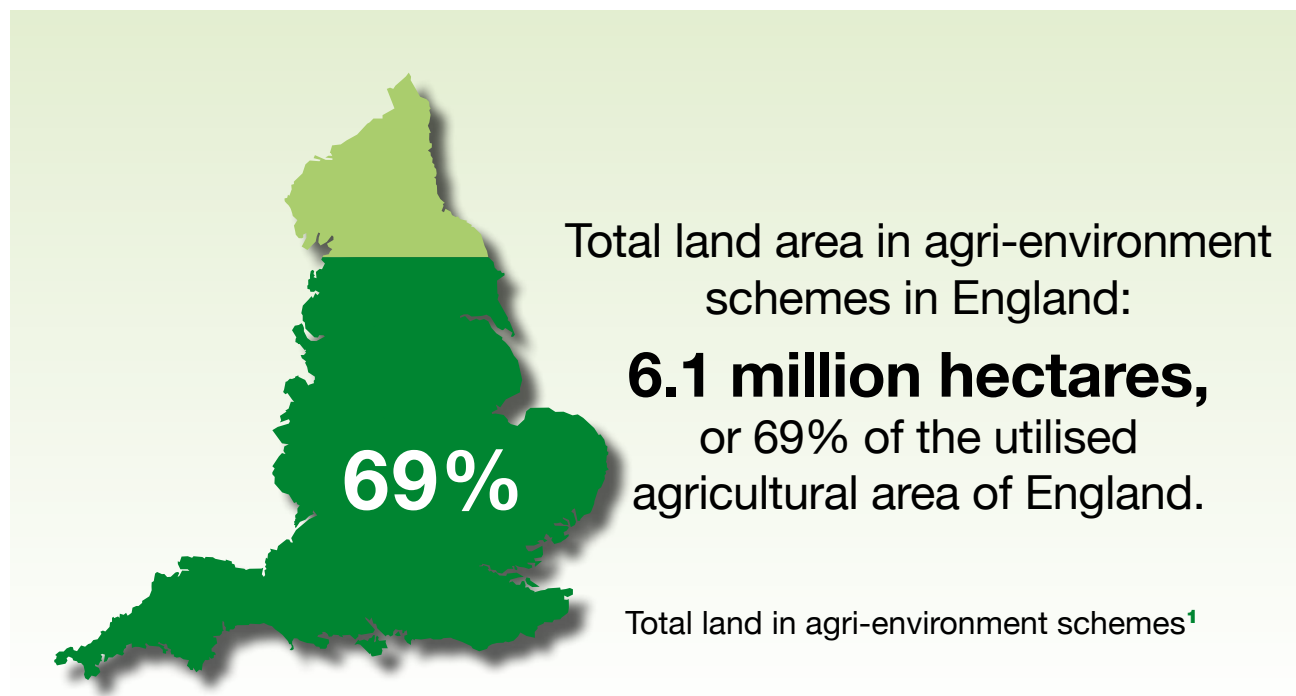


The gap between the top and bottom performers is largest among small and part-time farms. The best in these groups generate ratios that match or exceed those of many larger farms, while others struggle to cover input costs. This suggests that size and scale do not inherently limit performance.¹⁴



Environmental status and pressures: Agri-environment schemes

Measurable progress in lowering the environmental impact of pesticide use



Nitrogen Use

Application rates for nitrogen have shown an overall decline on cropping and grass categories, steadily decreasing since 1998. Application rates on cropped land have fluctuated over time but saw large dips in 2020 and 2022, with an overall decline from 2010 to 2024.²⁵

Pesticide Use

The National Action Plan introduces a UK domestic target to reduce the potential pressure from pesticides on the environment by 10% by 2030. This target will be monitored using the UK Pesticide Load Indicator (PLI), which measures the impacts of pesticides across 20 metrics and is focused on reducing potential environmental harm, rather than a simple volume reduction target. Out of the 20 PLI metrics, 17 have shown a mean reduction of 10% or more between 2018 and 2022.²⁶

As of October 2025, there were 44,500 active Sustainable Farming Incentive (SFI) agreements in England.²⁴



Environmental status and pressures: Biodiversity

Environmental pressures remain high

England's nature services provided benefits exceeding £37.1 billion in 2022 - more than any single manufacturing sector.²⁷

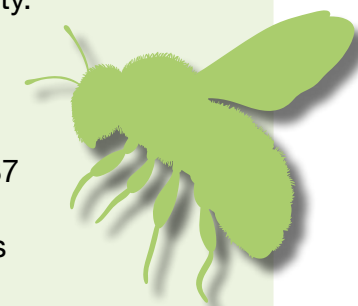
Farmland bird populations in England ²⁸

- Farmland bird populations in England have declined by 64% since 1970.
- For most species, the most severe population declines occurred between the late 1970s and the early 1980s, largely due to the negative impact of rapid changes in farmland management.
- Although the rate of decline has slowed, populations have continued to decline at a fast rate, declining by 11% in the five years since 2019.



Pollinating insects

- The presence of pollinating insects reflects the health of ecosystems that also support plants, food production and wider biodiversity. Changes in pollinator numbers can affect how many different species live in an area.
- There was an overall decrease in the distribution of pollinators in the UK from 1987 onwards. By 2024, the indicator was 23% lower than its 1980 level. However, there has been no further decline in recent years, with levels remaining stable between 2019 and 2024.



What our stakeholders told us

- Environmental sustainability is fundamental to a productive farming system.
- Farmers deliver significant environmental benefits, and this contribution should be valued through financial incentives.
- Multifunctional land use should support food production while meeting environmental and climate targets.



Environmental status and pressures: Biodiversity

Environmental pressures remain high

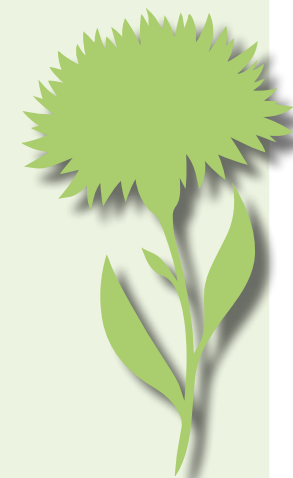
All species ³⁰

- The all-species indicator is based on data for 1,185 species. The list is developed with the aim of including the broadest possible set of organisms, although the species coverage is limited by data availability.
- Between 1970 and 2024 the index of change in relative abundance of species in England declined by around 40%. Over this long-term period 41% of species declined in abundance, while 30% increased.
- Between 2019 and 2024, the relative abundance index declined by around 11%. Over this short-term period, 47% of species declined and 38% increased.



Priority species ³⁰

- Priority species have been identified as being of conservation concern, often due to rapid population decline. Tracking their abundance, along with our other species-based indicators, provides an indication of the health of biodiversity.
- The abundance of priority species in England has declined on average by 80% since 1970. Over the long-term, 70% of priority species showed a strong or weak decline, while only 17% of priority species showed a strong or weak increase.



What our stakeholders told us

- Climate change and weather pose a significant challenge to future profitability and sector resilience.
- Farming can help the UK reach Net Zero, but progress must be judged fairly. This means taking a whole-system view and avoiding situations where emissions are simply shifted overseas through increasing imports.
- Stakeholders were positive about nature markets in principle but pushed for further consistency, regulation and access.

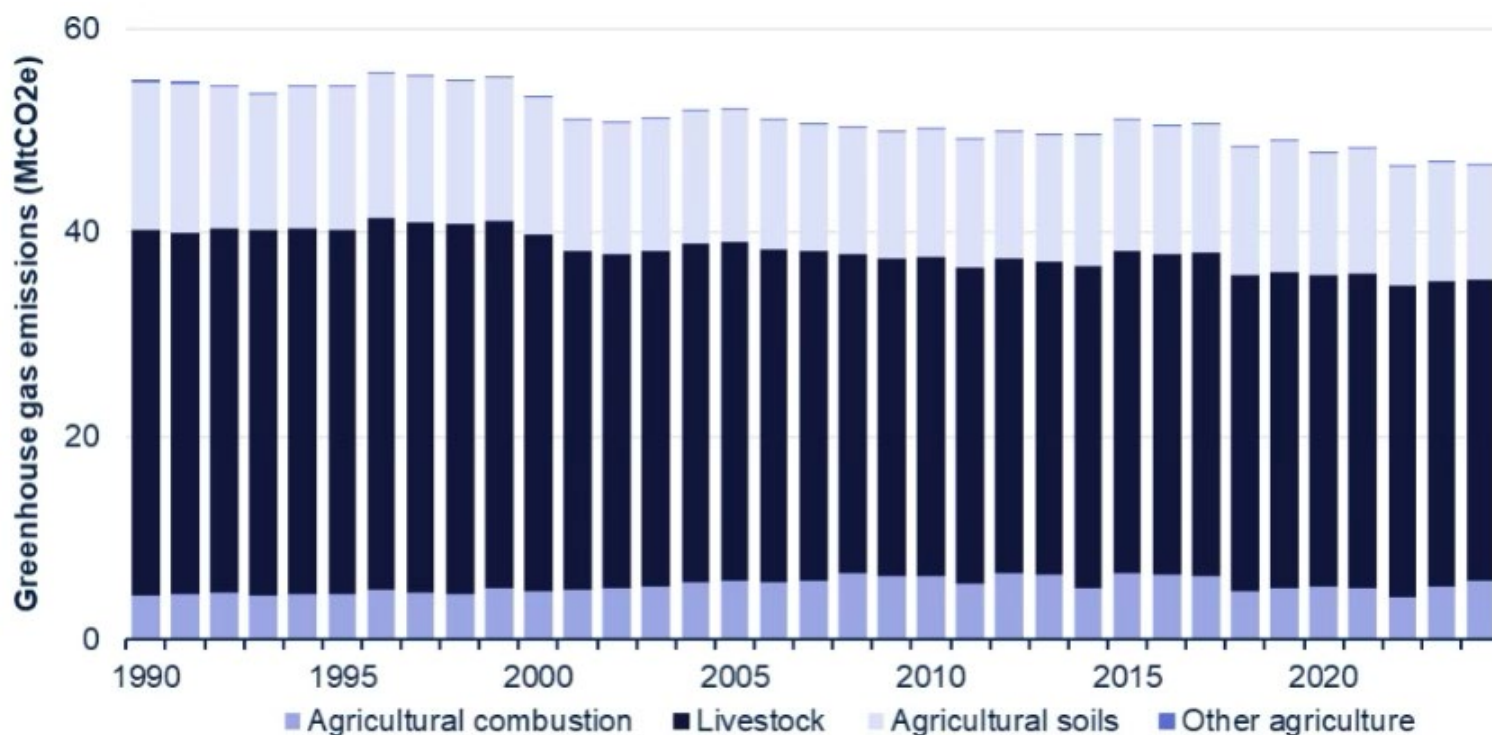


Environmental status and pressures: Air Quality

UK agriculture's total GHG emissions have declined over time (1990-2024)

- Agriculture accounts for 12% of the UK's greenhouse gas (GHG) emissions (46.5 Mt CO₂e).³¹
- UK agriculture's total GHG emissions have declined over time. In 2024, greenhouse gas emissions from the agriculture sector were 15% lower than in 1990, largely driven by a fall in animal numbers and synthetic fertiliser use.³¹
- However, agriculture now accounts for a larger proportion of emissions overall (12%), as other sectors have decarbonised more quickly.³¹

Greenhouse gas emissions from agriculture by subsector, UK 1990-2024 (MtCO₂e).³¹



Overall, the percentage of land area in England exposed to concentrations of ammonia (NH₃) that exceed critical levels was 80.6% in 2020-2022, a 3.2% decrease between the 3-year moving average time periods 2002-2004 and 2020-2022. The percentage of land area has shown a decreasing trend since reaching its peak of 91.5% in 2017-2019.^{32, 33}



Environmental status and pressures: Water

Agriculture is a major source of water pollution in England

In 2024, farming activities caused 67 serious pollution incidents to the water environment.

Of the 67 incidents to water, dairy farming caused 46 and arable and other farming caused 21. 92% of the dairy incidents in 2024 involved silage or slurry.

Agriculture is a key driver of water pollution in England, with around 40% of river and groundwater pollution being caused by agricultural practices.

Serious pollution incidents from farming in England ^{34,35}



Benefits of sustainable agriculture

Farming sustainably can enhance profitability and improve resilience of agricultural production

Integrated Pest Management (IPM) ³⁶



- Integrated pest management improves air quality, soil quality and biodiversity through reduced pesticide use and provision of habitats.
- The savings that growers can make by using IPM measures and reducing pesticide use can offset any losses to overall yield and IPM has been shown to sometimes improve yield.

Soil management ³⁷



- Managing soil organic matter supports long-term yields, food quality, extreme weather resilience and carbon storage.

Nutrient Management ³⁷



- Nutrient management planning can allow land managers to match inputs of nutrients to crop demand. Precise nutrient application can further minimise waste and run off which could better optimise yield and profitability.
- This optimises yield, minimises nutrient use and minimises environmental losses.

In-field agroforestry ³⁷



- Integrating trees into arable crops has been shown to increase crop productivity potential and can substantially reduce soil erosion.



Consumer trends

Consumers are concerned about the cost, quality and sustainability of food

- UK consumers' top food concern in 2025 was food prices (92%).³⁸ More than half of consumers report money saving food behaviours including eating food past its use by date (62%) and buying less food (54%).³⁸
- Consumers are concerned about food quality, particularly ultra-processed or over processing of food (79%) and the general quality of food (77%).³⁸
- Most consumers are concerned about climate change, however overall concern about climate change has steadily declined from 85% in Autumn 2021 to 77% in Winter 2025.³⁹ Most (74%) consumers think it is important to buy food which has a low environmental impact.⁴⁰
- Some consumers have made changes to their food-related behaviours in the last 12 months, including eating less processed food (49%), minimising food waste (36%) and eating more fruit/vegetables (46%).⁴¹ Despite high concern about environmental impact, in practice price is a key driver of food consumption habits.
- Most (77%) consumers are confident in the supply chain, defined as “all the processes involved in bringing food to your table”.⁴¹

What our stakeholders told us

- Understanding and valuing food and farming is essential to a thriving sector.
- Connecting the public with farming can increase understanding of food production and ensure high quality domestic produce is valued.
- Key enablers include public education and engagement, as well as the promotion of domestic produce and associated high standards.
- Some farming stakeholders said food prices should increase to ensure farm-level profitability, whilst other stakeholders shared concerns that increased food prices could have unintended consequences including increased food inequality and an increase in consumption of cheap and ultra-processed foods.
- Stakeholders representing supermarkets voiced a reluctance to pass price increases onto consumers.



Consumer trends

Consumers are concerned about the cost, quality and sustainability of food



In 2024, the poorest fifth of households spent **5% less** on food in 2024 than 2023 after adjusting for inflation.⁴² This may suggest that poorer households either consumed less, or where applicable, switched to lower cost or quality alternatives.



UK consumers' expenditure on food and alcoholic drinks was **15.7% higher in 2023 than in 2014.** ¹⁰



24% of households in December 2025 were worried about not being able to afford food, which remains stable since 2023. ³⁸



In 2024 to 2025, **9%** of individuals were living in food insecure households. ⁴³



Average meat consumption per person per day in the UK decreased between 2008 to 2019 from 103.7g to 86.3g. Between 2008-2011 and 2017-2019, consumption of plant-based alternatives rose by **115%.** ⁴⁴



The organic sector is now on its 14th consecutive year of growth, with a strong reliance on imports the sector makes up **3%** of UK farmland. ⁴⁵



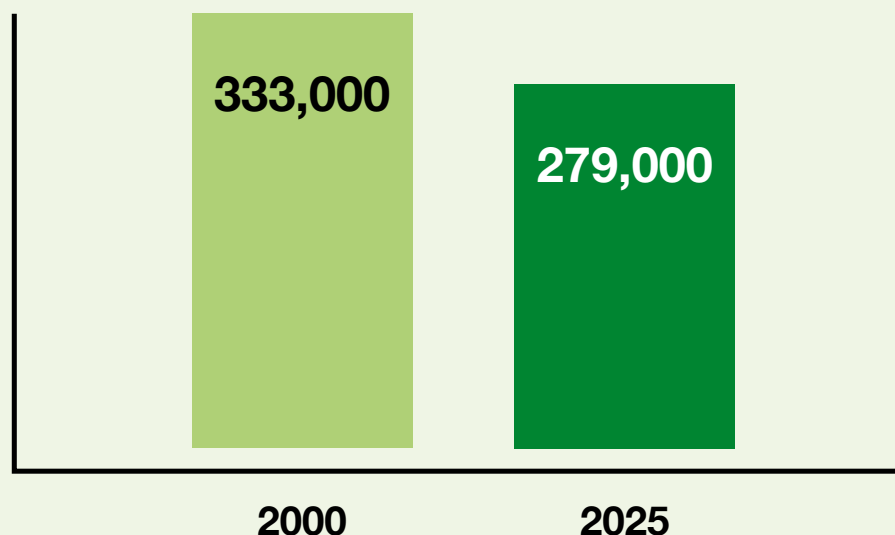
The definition of food security is: "when all people, at all times, have physical and economic access to sufficient, safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life"^{46, 43}



The agricultural workforce

The farming workforce is declining in size and ageing

There has been a downward trend in workforce size. The agricultural workforce was 279,000 in 2025, compared with 333,000 in 2000.⁴⁷



The workforce is ageing, with 40% of principle farmers aged 65+ years old and only 15% under 45 years old.⁴⁷

What our stakeholders told us

- There was a desire for a skilled, well supported workforce with strong advisory networks and clear pathways for new entrants.
- Challenges include a lack of time and resources for farmers to upskill, poor mental health and low morale, leading to confusion, isolation, and farmers feeling undervalued and disempowered.
- Education and upskilling of farmers through collaboration, advice and training was seen as important, especially to ensure farmers can adapt and implement new technologies.
- New entrants were considered key for enabling improved skills and knowledge base, with this supported by positive working conditions, supportive rural amenities, viable education, and improved entry through succession and land access.

“I’d like to go into farming but its financial position in this day and age makes it one of the most difficult careers young people can go into”
(Prospective Young Farmer)



The agricultural workforce

The farming workforce is facing notable skills gaps

Whilst vacancies in the sector are low,

39%

of vacancies are attributed to skills shortages.⁴⁸



The seasonal worker visa allocation for 2025 was

38,805

a **10%** increase on the previous year. This followed a substantial increase in quotas in recent years.⁴⁹

In 2024/25, **84%** of farm businesses were carrying out some kind of business management practice, with top performing farm businesses more likely to be doing this than lower performers.

The most common business management practice was having an informal plan. The proportion of farms carrying out business management practices remained broadly consistent between 2016/17 and 2024/25.²³



The agricultural workforce

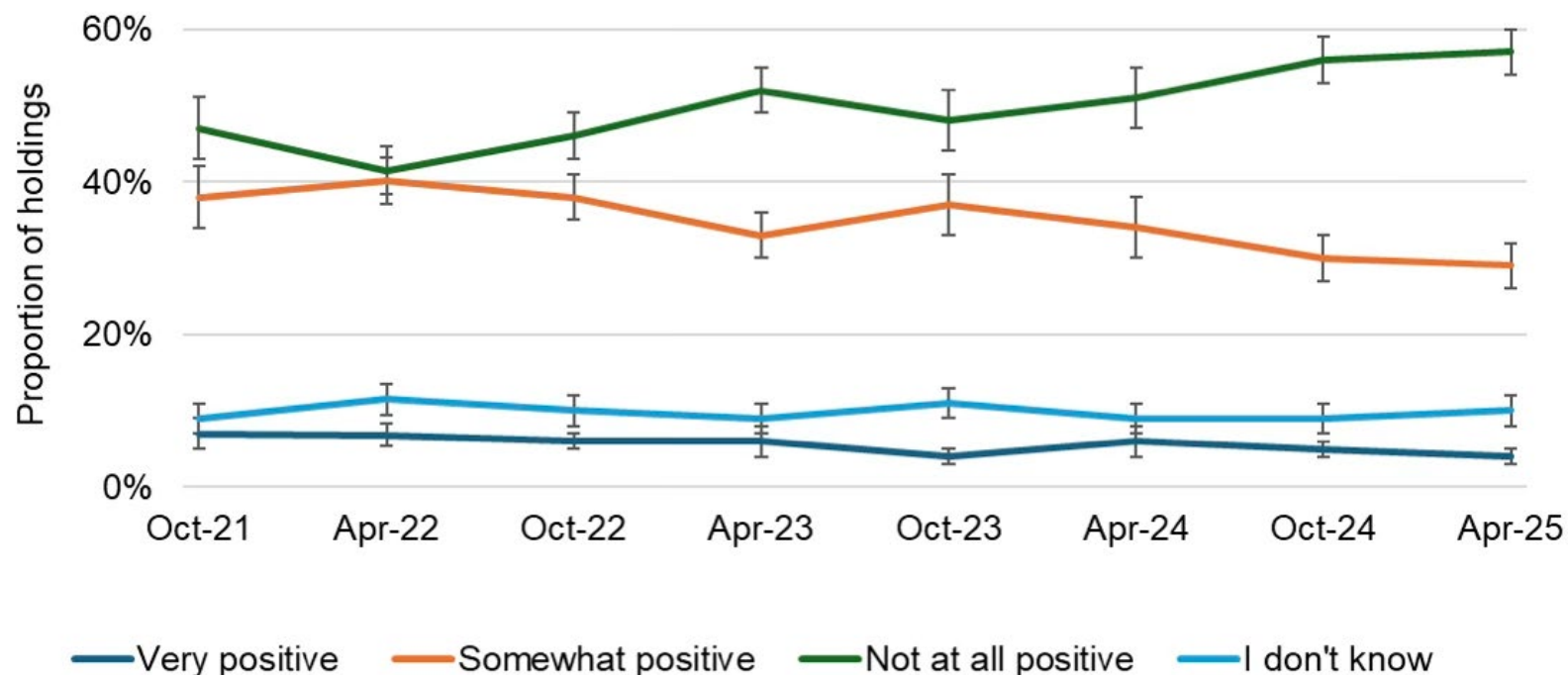
Fewer farmers feel positive about the future of farming

When asked how they feel about their future in farming, farmers on 33% of holdings feel positive about their future in farming, continuing the downward trend seen in recent years.

The proportion of farmers that feel positive about their future in farming has reduced by 12% since the question was first asked in 2021.⁵⁰

“Mental health is a big issue at the minute and that’s because of finances, because of stress”
(Farmer)

Proportion of holdings that feel positive about their future of farming, October 2021 to April 2025⁵⁰



What we expect to see if things are going well

Success would mean a farming sector that is more productive, profitable, sustainable and resilient

A more profitable sector would show:

Higher average Farm Business Income over the long term, across core farming, agri-environment activity and diversification. This would suggest that farms have a mix of income sources and that the business can withstand volatility in commodity markets or weather conditions. At the sector level there would be a reduced number of loss-making farm businesses.

A productive and economically healthy sector would show:

Higher Total Income from Farming and Gross Value Added. This would indicate that the sector is generating more value and contributing strongly to the wider economy across all farm business activities, without relying on short term price shocks or one-off payments.

Improved agriculture Total Factor Productivity. This would reflect more efficient use of labour, land, fertiliser and other inputs, suggesting that investment, skills and innovation are paying off in better output with fewer resources.

Reduced performance gap, as the number of lower performing farms reduces.

A sustainable sector would show:

Reduced greenhouse gas emissions from agriculture. Lower emissions from livestock, soils and energy use would indicate progress towards climate goals while maintaining production.

Reduced dependency on pesticides. This would show that farms are managing pests through more sustainable approaches such as Integrated Pest Management.

Increased amount of land being managed for the environment. This would suggest that more farmers see environmental actions as part of their business model, improving biodiversity and landscape outcomes. Over time we will see a smaller share of funding coming from schemes and a growing share from private markets and supply chain requirements.

Increase in species abundance. This would suggest that environmental actions are translating into real ecological outcomes, with habitats supporting more wildlife.

A resilient and confident sector would show:

Consistent production capacity, signalling reduced vulnerability to global shocks.

Secure food supply, demonstrating that food is reliably available over time (as monitored by the UK Food Security Report), without major disruptions caused by extreme weather, geopolitical shocks, labour shortages or supply chain failures.

Higher proportions of farmers reporting confidence and optimism, indicating that businesses feel able to respond to change and see a viable future in farming.



These indicators sit alongside statutory reports including EIP, GHG emissions statements and the UK Food Security Report, together providing a more complete picture of where the sector is heading. We will report periodically in line with our existing commitments within the Agricultural Act.



Engagement

A programme of engagement provided opportunities for a range of people with an interest in farming to share their views on the future of the sector

- **National ‘Futures Thinking’ workshops.** Participants included representatives from farming and environmental organisations representatives, academics, supermarkets and banks. Using a deliberative, futures thinking approach, participants discussed probable and preferable futures and associated enablers, barriers and unintended consequences. Attendees were selected through Defra’s existing networks, alongside individuals and organisations who have been actively exploring long-term futures for farming so that we could draw on their insight.
- **Online scoping exercise.** The exercise gathered stakeholder views on the findings of the futures workshop and opinions of potential futures states.
- **Regional workshops.** Workshops were held in Winchester, Exeter, Ashford, Carlisle, Worcester, Lincoln and Hexham and invited farmers to think about preferred futures for the sector and discuss barriers and enablers. We worked with local networks, including local authorities and auction marts to reach people embedded in the local farming community to ensure engagement captured locally grounded insight.
- **Online focus groups.** Our focus groups were attended by active farmers and representatives from farming and environmental organisations. The online workshops explored participants' priorities for the future and their expectations for the roadmap. For the focus groups, specific groups were targeted such as organic farmers, contractors and young farmers to explore issues that might not surface in broader engagement.
- We attended auction marts and agricultural shows while developing the roadmap to gain insights from stakeholders.
- **Reflective workshop.** A final reflective workshop was attended by representatives from national farming and environmental organisations. Attendees were presented with findings from earlier engagement activities and asked to reflect on various elements of the roadmap including purpose, components, audiences and content.

Farmers were central to the engagement because they will be directly impacted and they bring the practical insight needed.



Supporting evidence

Wider evidence was used to support engagement

In addition to the evidence gathered through our engagement programme wider evidence was also utilised alongside primary engagement to ensure the roadmap reflected a broad and balanced view of the sector.

This included analysis of relevant media coverage to help identify persistent issues of concern to the sector, Defra's annual Farmer Opinion Tracker (FOT) which provides insight into how farmers are feeling, relevant responses to the Land Use Framework (LUF) consultation and insight gathered through Defra's ongoing programme of engagement with farmers and stakeholders.

We undertook a thorough analysis of future focussed strategies and papers published by stakeholders to gain an understanding of the range of strategic perspectives.



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