

# Farm Business Survey

**2021/2022**

## Horticulture Production in England



Richard Crane, Rosie Grever and  
Elspeth Organ



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## **Foreword to the First Series**

This report is one of a series being produced based on the results of the Farm Business Survey (FBS) for England. The annual Farm Business Survey is the most comprehensive and independent survey of farm incomes and provides a definitive data source on the economic and physical performance of farm businesses in England. It is conducted by a Consortium comprising the Universities of Cambridge, Newcastle upon Tyne, Nottingham and Reading, and Askham Bryan, Duchy and Imperial Colleges. The Consortium is led by the University of Nottingham and its members work in partnership, using uniform and standard practices in reporting on their findings to ensure consistent data quality, accuracy and validity. The Survey is financed by Defra and the Consortium values greatly the input of their staff.

These detailed reports for various farm types and enterprises are in addition to the comprehensive Farm Business Survey Reports for Government Office Regions published at [www.farmbusinesssurvey.co.uk](http://www.farmbusinesssurvey.co.uk). The Consortium is seeking by these additional reports to ensure that timely and relevant information is available to farmers, consultants, advisers and other organisations and individuals interested in farming and land management. The analysis and publication of these reports uses data from farm businesses across England, with an individual member of the Consortium undertaking the research analysis. In line with the ethos of the Consortium, these reports present results in such a way as to ensure a significant element of continuity and consistency from one report to the other, whilst also ensuring that each report captures the contemporary issues of relevance to the sector of agriculture in England to which it relates.

We believe these reports will make a valuable and useful contribution to the farming industry and we commend them to you.

**Prof. Martin Seabrook**

(Chief Executive of the Consortium)

Spring 2007

## Foreword to the Seventeenth and Final Series

Welcome to this seventeenth and final series of reports on the economics of agriculture and horticulture in England produced from *Rural Business Research (RBR)*. Over the last seventeen years, RBR, our leading academic consortium comprising the Universities of Cambridge, Newcastle, Nottingham and Reading, and Askham Bryan and Duchy Colleges has, as detailed in Professor Seabrook's first foreword in this series, set out through these reports to "*make a valuable and useful contribution to the farming industry*". Reflecting on these series of reports, and the research and analysis that lies behind them, I am confident that we have both achieved and surpassed these initial aims, as evidenced through their longevity in production and loyalty of readership.

This final series draws on the 2021/22 financial year for farmers and growers, and covers the 2021 harvest year. Over this financial year, average Farm Business Income (FBI), derived from our work on the Defra-funded Farm Business Survey (FBS), increased to £86,100 per business, representing an increase of 66% on 2020/21. In percentage increase terms, General Cropping, Lowland Grazing Livestock and Mixed farm types saw FBI increase of 117, 85 and 84% respectively. At the top end of these average incomes per farm business, General Cropping, Dairy and Specialist Poultry received average FBIs in the order of £140,000. In contrast and borne out by the structural change we are witnessing in the pig sector, average FBI returns to Specialists Pig farms decreased by 75%, leaving an average FBI of only £11,800. The challenges and opportunities currently facing farmers and growers are many and varied, ranging from supply reductions and increased demand driving up commodity prices, to major shortages or greatly inflated prices of key inputs such as feed, fuel and fertiliser, to the ongoing challenges of attracting labour to our industry.

Of course, at the same time, for many farmers and growers the reduction, and the eventual loss, of the Basic Payment is now becoming a dawning realisation. Many businesses, on the back of strong FBI performances, will be well placed to adapt. However, for others, and in particular grazing livestock businesses, this payment reduction and eventual loss will be a hard pill to swallow. As we approach the mid-point years of the "2021-2027 Agricultural Transition" evidencing the economics of agricultural and horticultural businesses will grow in importance. Policy makers will rightly continue to draw on the FBS as the most authoritative evidence base of the changing fortunes of agriculture and horticulture. At the heart of this evidence base, across England over the last 86 years, has been the Universities and Colleges that have supported the methodological development of the FBS with Defra, working alongside colleagues in Wales and Scotland in a partnership approach, to deliver the Gold Standard of data quality upon which we have all become reliant. It is therefore with a heavy heart that, following the outcome of a recent open tender for this work, I announce that our specialist consortium will no longer be delivering this important work in the future. The FBS in England is of crucial importance to the farming industry and I wish it well in its new future under Promar International's delivery, and hope that RBR's collective 86 years of expertise and input serves as a strong basis for its continued success.

As I draw this seventeenth and final series to a close, I do so by thanking Defra for funding this vital work over the years, and to the thousands of farmers and growers who have, over nearly nine decades, freely shared their information, farm business data and time with us for the benefit of the industry. I also thank most of all both current and former colleagues from the universities and colleges who have worked on the FBS and who may continue to do so; it is their professionalism and dedication that has delivered every year, frequently against the backdrop of enormous challenge, and it has been the greatest of professional privileges to have led this team over the last 16 years.

**Professor Paul Wilson**

Chief Executive Officer, Rural Business Research  
December 2022

[www.ruralbusinessresearch.co.uk](http://www.ruralbusinessresearch.co.uk)

## Acknowledgements

Rural Business Research thanks sincerely all those farmers who have voluntarily provided records and information on which the annual Farm Business Survey, and this report, is based.

The basic information on which this report is based was collected on behalf of, and largely financed by, the Department for Environment, Food and Rural Affairs and is Crown Copyright.

*The views expressed in this publication are those of the authors and are not necessarily shared by other members of the University or by the University as a whole.*

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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 62.

#### Highlights:

- In 2021, the output from horticulture was £4,157 million, 15% of total agricultural output [1]
- During the last decade, there has been an average annual increase of 2% in output (based on current prices) for total horticultural production [1]
- Vegetable production remains the largest horticultural sector, in terms of both land use and output, accounting for 40% of total UK horticultural output and 71% of total productive outdoor horticultural area in 2021 [1,2]
- The proportion of vegetable production has reduced over the last 30 years, from a decade average of 52% in 1992 to 2001, to 41% in the most recent decade, 2012 to 2021 [1,2]
- Output from ornamentals was an average of 37% during the decade 2012 to 2021, which was the same as the previous decade [1,2]
- Fruit output, at 22%, has shown an increase from the 19% average in the previous decade [1,2]
- In 2021, the UK was 42% self-sufficient in all vegetables, 20% in all fruit and 57% in all ornamentals, in terms of value [1,2]
- The index of producer prices showed some wide variability between 2020 and 2021 with indices for fresh fruit up two points and fresh vegetables up 45 points [3]
- The index of purchase prices saw fuel for heating to decrease, from 112 to 107, along with fertilisers & soil improvers from 103 to 91, while sprays increase from 133 to 146 [4]

### Section 2

**A review of the financial results derived from the Farm Business Survey (FBS) for the 2021/22 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 2021/22 was 2,438, while the total FBS sample was 130 businesses, representing 5.3% of the national population of eligible horticultural businesses

- Profitability for all horticultural businesses, as measured by Farm Business Income (FBI), increased by 14.6%, to an average of £60,625 per business in 2021/22
- Of the four horticultural groups, Specialist hardy nursery stock and Other horticulture businesses experienced an increase in profitability, while Specialist fruit and Specialist glass businesses showed a fall 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 62.

### 1.1 *The contribution of horticulture to UK agricultural output*

- Total agricultural output in the UK in 2021 was £30,029 million, up 11% from the previous year
- Total horticultural output in the UK in 2021 was £4,157 million, contributing 14% to total agricultural output
- Total horticultural output increased by £77 million between 2020 and 2021, up by 2%
- Average horticultural output in the ten-year period 2012 to 2021 was £3,790 million, an increase of £737 million (24%) compared with the previous 2002 to 2011 period average

### 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 for reporting purposes
- The area used by each sector has varied over the past thirty years, however, during the past decade from 2012 to 2021 the vegetable sector accounted on average for the largest proportion of land use (72%), followed by fruit (21%) and ornamentals (7%)
- The total area of land utilised for horticultural production since 1992 averaged 173,704 ha; from a peak of 213,648 ha in 1986, to a low of 161,096 ha in 2021. The total area decreased by 3% from 2020 to 161,096 ha in 2021
- Output has also varied over the past thirty years, which on average has seen the vegetable sector as the greatest contributor (46%), followed by ornamentals (36%) and fruit (18%)
- In 2021 actual output for the sectors was:

○ Vegetables	40%		41% }
○ Ornamentals	38%	compared to	34% }
○ Fruit	22%		25% }
- In value terms, horticultural output in 2021, (compared with 2020) was:

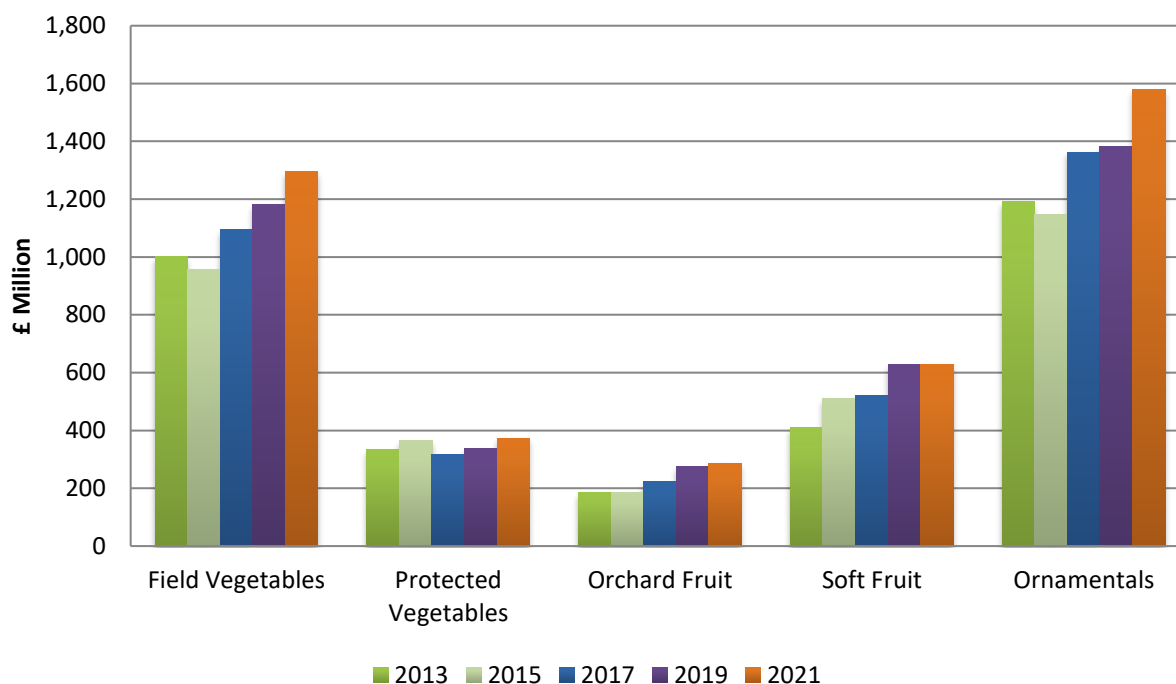
○ £1,668 million for vegetables	(down less than 1% from £1,675 million)
○ £1,580 million for ornamentals	(up 15% from £1,371 million)
○ £908 million for fruit	(down 12% from £1,034 million)

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

- The value of total annual horticultural production in the UK has averaged £3,480 million in the decade since 2012
- In this decade, production started at a low of £2,976 million in 2012, and increased to a peak of £4,165 million in 2021
- Between 2012 and 2021, total horticultural production grew in value by 40% with the different sectors showing a wide variation in growth rates as noted below:

○ Vegetables	from £1,263 million to £1,668 million, up 32%
○ Fruit	from £570 million to £917 million, up 61%
○ Ornamentals	from £1,142 million to £1,580 million, up 38%

**Figure 1.1 Value of horticultural production (current prices: £m)<sup>1</sup>**



**Table 1.1 Area of outdoor and protected crops in the UK (ha)<sup>1,2</sup>**

	2013	2015	2017	2019	2021
Glasshouse crops (excl. protected vegetables)	1,728	1,799	1,981	2,026	2,064
Protected Vegetables	827	868	826	799	798
Outdoor Non-Edibles	11,891	11,996	12,512	11,673	12,534
Field Vegetables	115,930	122,885	117,067	114,513	112,220
Orchard Fruit	23,398	25,887	24,449	23,639	23,031
Soft Fruit	9,580	9,951	10,747	10,953	10,450

**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 19% from 2013
- The area of protected vegetables decreased by 4% from 2013
- The area of outdoor ornamentals increased by 5% from 2013
- The area of field vegetables decreased by 3% from 2013
- The area of orchard fruit decreased by 2% from 2013
- The area of soft fruit has grown by 9% from 2013, but fell by 5% between 2019 and 2021

#### 1.4 The horticultural sector in 2021

- The total value of horticultural output in 2021 amounted to £4,165 million
- Field scale vegetables comprised the largest share of total output at 31%
- Flowers and bulbs accounted for the lowest share of the total output at 3%

Figure 1.2 Value of horticultural produce in 2021 by proportion of total output <sup>1</sup>

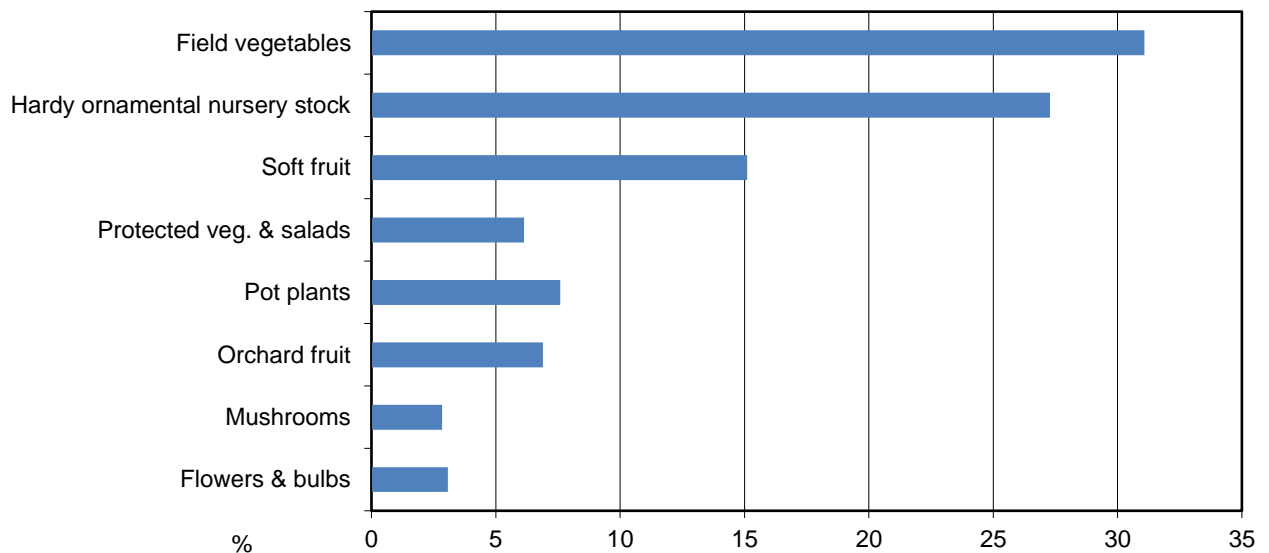
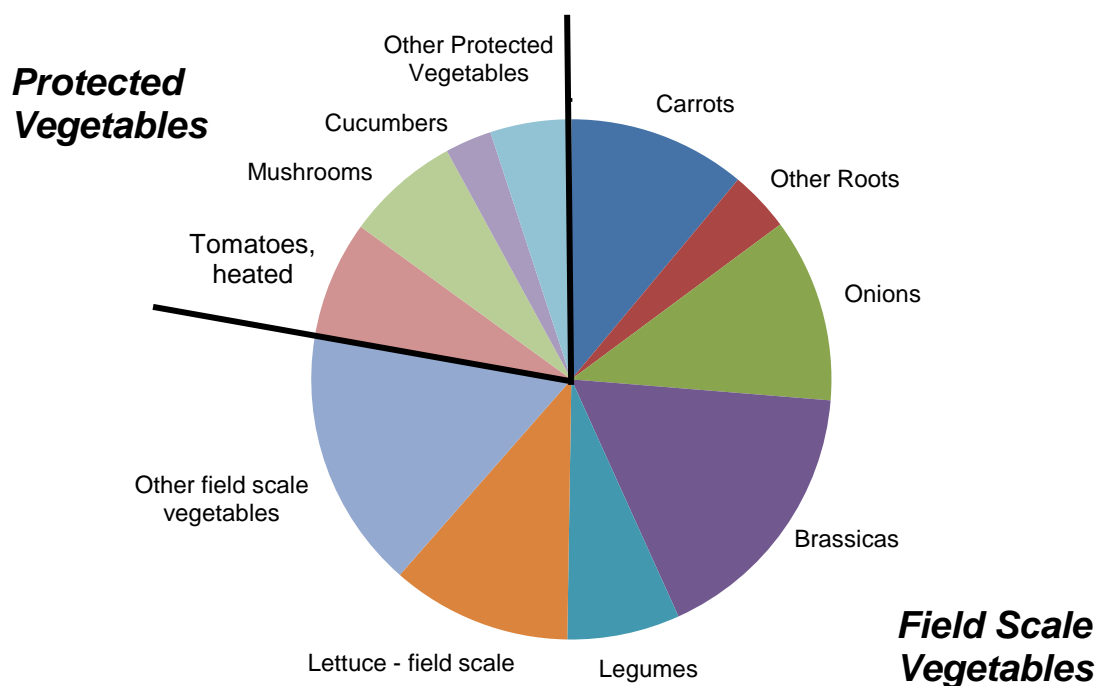
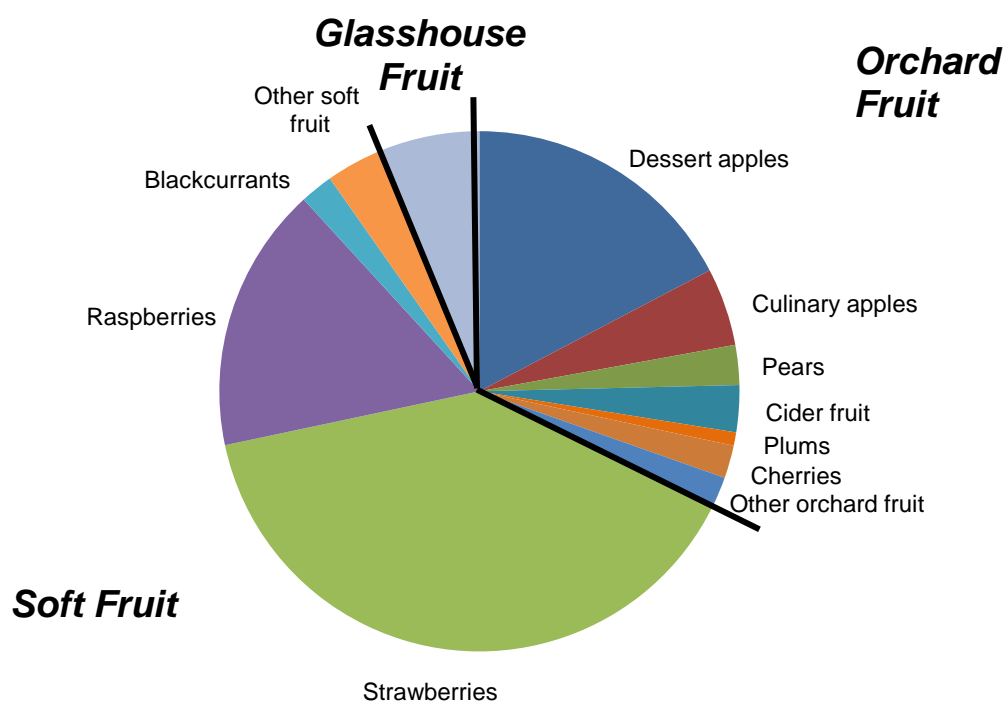


Figure 1.3 Composition of vegetable output in 2021<sup>2</sup>



- Field scale vegetable production account for 78% 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)
- Brassicas account for the largest single proportion by category of the total vegetable value at 17%, followed closely by Other field scale vegetables at 16%
- Protected vegetables, including crops grown in both heated and cold glasshouses and polythene tunnels, account for 22% of total vegetable value
- Mushrooms and tomatoes are the highest contributing protected vegetables to the total vegetable production value, both at 7%

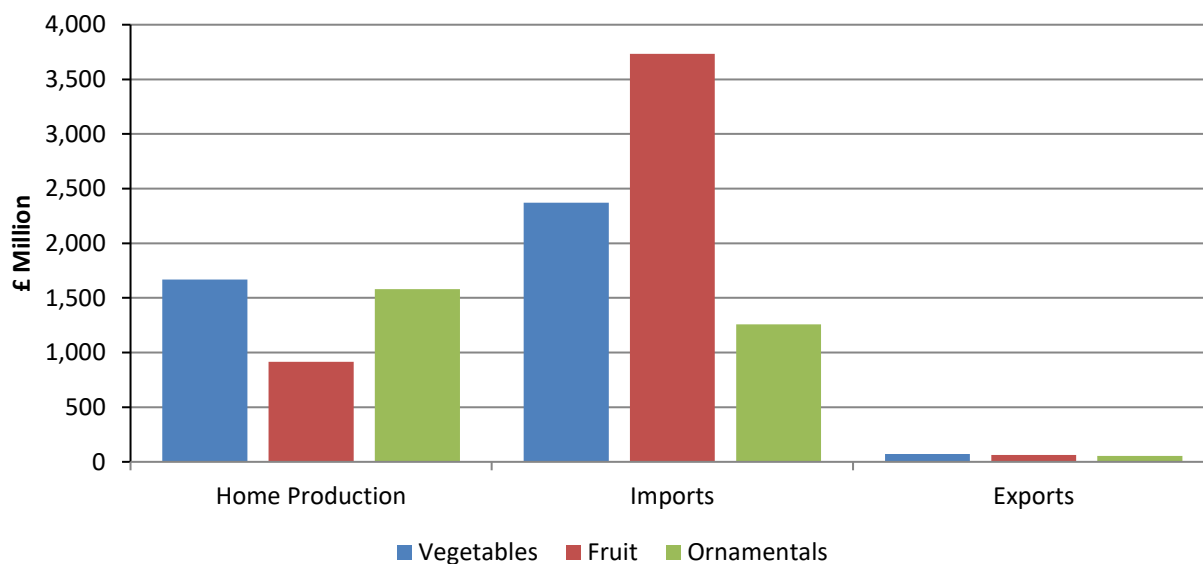
**Figure 1.4 Composition of fruit output in 2021<sup>2</sup>**



- Total fruit output by value was £917 million, with the production of field grown soft fruit generating £575 million (63%), orchard fruit £287 million (31%) and glasshouse fruit £54 million (6%)
- Strawberry production contributed the greatest share of all soft fruit production at £352 million, 38% of total fruit production
- Dessert apples accounted for 54% of orchard fruit output (£154 million) in 2021, and was 17% of total fruit production with raspberries just below 16%

## 1.5 Imports and exports of horticultural products

Figure 1.5 Value of vegetables, fruit and ornamentals 2021 (£m)<sup>1,2</sup>



### Vegetables

- The UK was 42% self-sufficient in all vegetables in terms of value in 2021, averaging 39% during the decade 2012 and 2021
- Between 2020 and 2021 the value of imports decreased by 7% to £2,370 million, whilst the value of exports dropped by 35% to £73 million
- The value of home-produced vegetables in actual prices increased by 33% between 2012 and 2021, an increase of £414 million

### Fruit

- In 2021, in terms of value, the UK was 20% self-sufficient in fruit, 2% above the average over the past decade, since 2012
- Between 2020 and 2021 fruit exports decreased by 66% to £63 million, and the value of imports fell by 5% to £3,733 million
- The value of home production in actual prices increased between 2012 and 2021 by 60%, with an overall increase of £343 million in the last decade

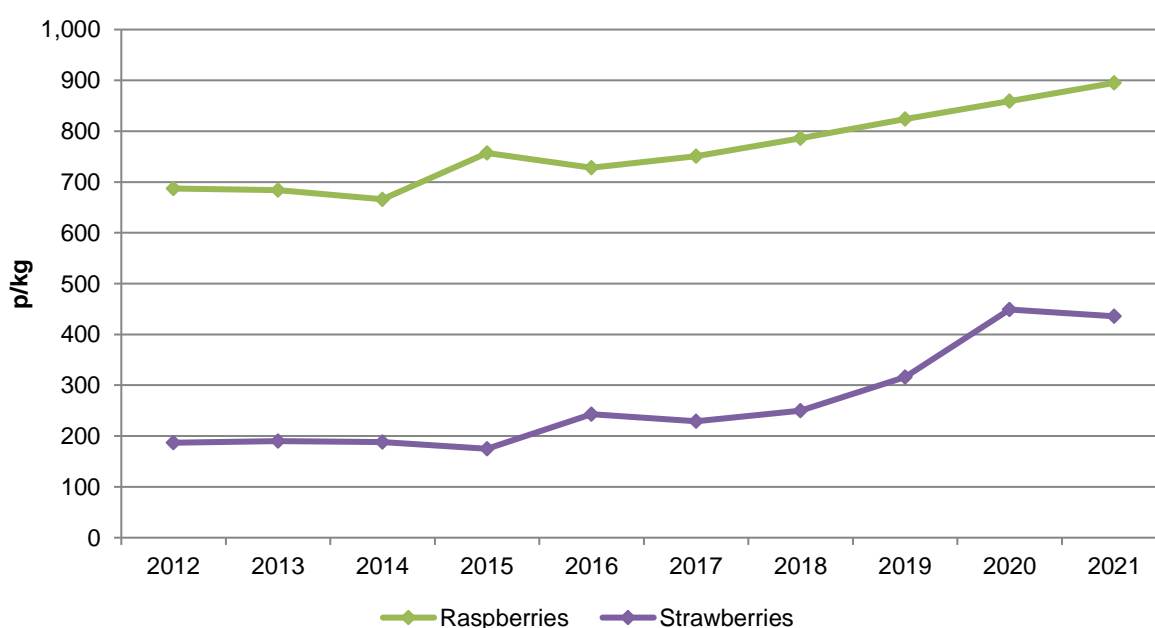
## Ornamentals

- In terms of value, self-sufficiency for ornamentals in 2021 was 57%, averaging 54% since 2012
- Between 2020 and 2021 the value of imports increased to £1,259 million, up 3%, while the value of exports dropped by 19% to £55 million
- The value of home production in actual prices increased between 2012 and 2021 by 38% and is now at the highest level of £1,580 million

### 1.6 Farm gate prices (actual): recent trends

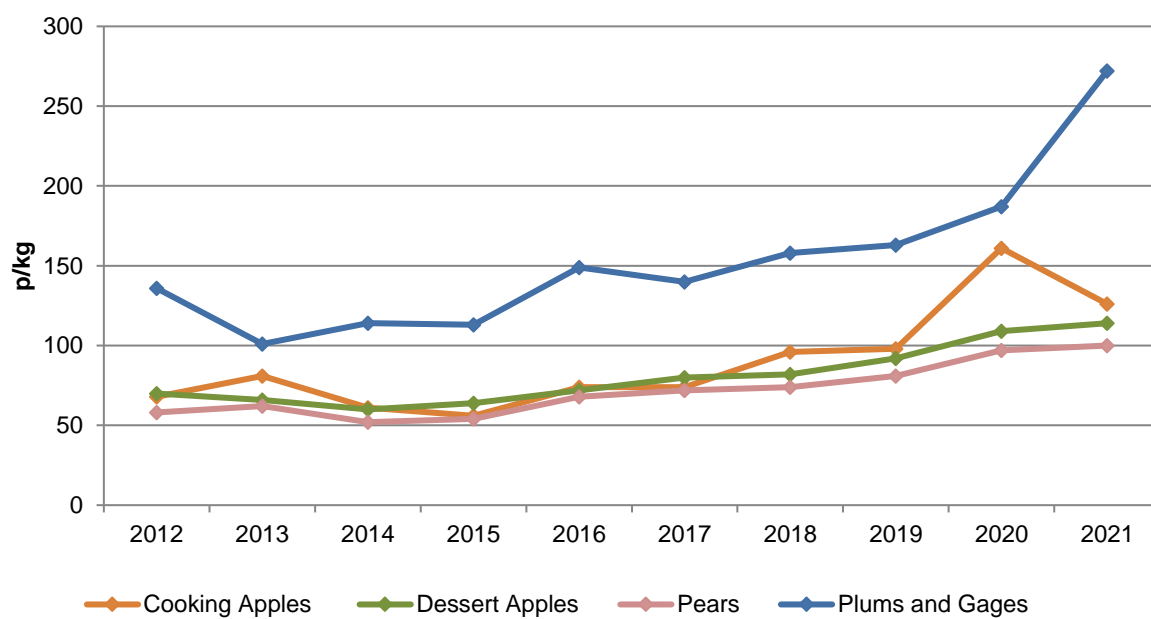
- The fruit and vegetable sectors have seen significant price fluctuations between 2012 and 2021. As shown in Figure 1.6, strawberries were slightly below their highest price within this period, averaging 436 p/kg during 2021, raspberries were at their highest price, averaging 895 p/kg in 2021
- Top fruits shown in Figure 1.7 are also all at their highest value in the 2012 to 2021 period. In the last ten years dessert apple prices rose from a low of 60 p/kg to a high of 114 p/kg in 2021. Plums & gages have seen the largest increase, from 101 p/kg in 2013 to 272 p/kg in 2021
- Brassicas, namely brussels sprouts, cabbage and calabrese, have shown considerable inter-year variability, with an average price fluctuation between lowest and highest prices of 187% during the 2012 to 2021 period
- Vegetables excluding brassicas, namely carrots and parsnips, also showed inter-year variability, with an average price change of 44%, between the highest and lowest point in the last ten years
- Salad crops, i.e. lettuce, tomatoes and cucumbers, recorded price changes between the lowest and highest point of 93%, 67% and 54% respectively over the period 2012 to 2021

Figure 1.6 Average soft fruit farm gate actual prices<sup>3</sup>

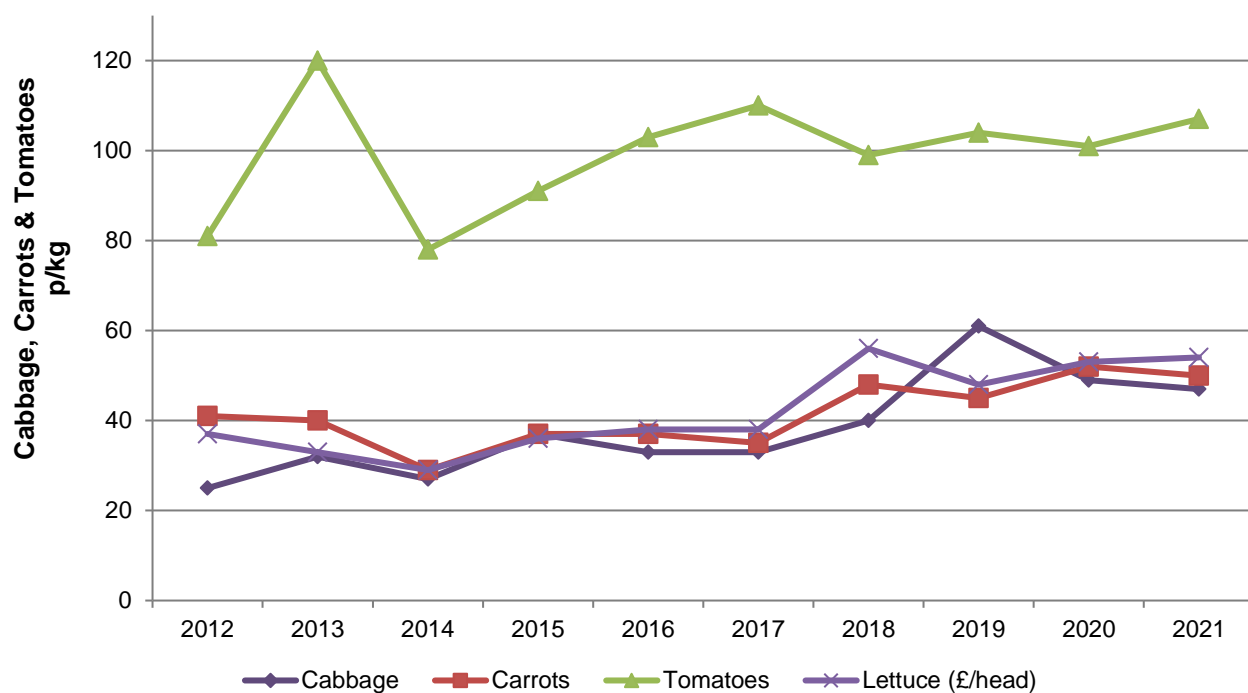




**Figure 1.7 Average top fruit farm gate actual prices<sup>3</sup>**



**Figure 1.8 Average vegetable farm gate actual prices<sup>3</sup>**



## 1.7 Price Indices in the UK

**Table 1.2 Index of producer prices (Index: 2015 =100)<sup>4</sup>**

	2015	2016	2017	2018	2019	2020	2021
Dessert apples	100.0	102.4	115.5	123.0	125.9	143.5	161.6
Dessert pears	100.0	110.7	127.4	131.2	143.2	170.6	193.4
Strawberries	100.0	111.8	117.6	116.5	133.4	185.2	159.6
All fresh fruit	100.0	107.6	115.3	119.5	130.2	172.2	159.5
Lettuce	100.0	111.1	107.9	138.2	121.4	132.9	142.5
Onions	100.0	114.4	116.6	130.4	161.0	142.2	147.4
Cabbage	100.0	109.7	113.4	126.1	140.6	147.2	141.2
All fresh vegetables	100.0	110.1	107.0	119.6	125.1	128.7	132.1
Flowers & plants	100.0	100.9	105.1	105.4	106.3	105.0	111.5

- 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 2015 are all set to 100.0 to show the relative change in prices
- Dessert apples and dessert pears show significant increases from 2020 to 2021 indices; dessert apples and dessert pears saw an increase of 18 points and 23 respectively. Whereas strawberries saw a significant decrease of 26 points
- Vegetables show slight increases from 2020 to 2021 indices; with lettuce rising by 10 points and onions rising by five points, with the exception of cabbages, dropping by six points
- Flowers & plants have increased to 112

**Table 1.3 Index of purchase prices (index 2015 =100)<sup>4,5</sup>**

	2015	2016	2017	2018	2019	2020	2021
<b>Current Inputs</b>							
Seeds	100.0	101.5	100.0	111.6	111.1	113.2	115.3
Fertilisers & soil improvers	100.0	82.6	89.6	100.8	103.2	90.5	136.6
Plant protection	100.0	100.0	106.8	134.2	133.0	146.0	147.2
Fuel for heating	100.0	97.1	100.7	107.5	111.6	106.5	111.5
Full-Time hired labour*	100.0	102.2	105.6	108.7	112.3	112.3	119.2
<b>Capital inputs</b>							
Machinery & other equipment	100.0	100.0	100.8	106.0	107.6	107.6	131.8
Buildings	100.0	99.4	103.4	107.9	110.5	110.8	113.7

\* 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 2015 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 46 points for fertilisers and five points for heating fuel between 2020 and 2021
- Full-time hired labour costs for Agricultural & related trades have grown steadily year on year, increasing by 19 points since 2015. It should be noted that within the Horticultural industry there is a strong reliance on casual labour which is not included in this index
- After the significant increase of five points from 2017 to 2018, machinery & other equipment returned to a lesser increase of one point from 2018 to 2019 and has now increased significantly by 24 points in 2021
- Buildings inputs have also shown a larger increase of three points compared to the previous year's less than one point increase



## 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 2020/21 and 2021/22 FBS and can be accessed at:

- [www.farmbusinesssurvey.co.uk](http://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 both '50% or more' and '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 (50% or more of crop output from glasshouse production)
- Table 2.8 Specialist glass (50% or more of crop output from glasshouse production), mainly edible crops
- Table 2.9 Specialist glass (50% or more of crop output from glasshouse production), mainly ornamental crops
- Table 2.10 Specialist glass (90% or more of crop output from glasshouse production)
- Table 2.11 Specialist glass (90% or more of crop output from glasshouse production), mainly edible crops
- Table 2.12 Specialist glass (90% or more of crop output from glasshouse production), mainly ornamental 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, top fruit excluding cider apples and specialist cider

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

- Table 2.13 All specialist fruit businesses
- Table 2.14 Specialist fruit businesses, mainly top fruit
- Table 2.15 Specialist fruit businesses, mainly top fruit-excluding cider
- Table 2.16 Specialist fruit businesses, cider

### **Specialist hardy nursery stock**

- Hardy nursery stock (HNS) accounting for more than two thirds of total standard output of the business
- The specialist HNS group has two sub-groups; intensive HNS crops with output more than £175,000 per hectare and extensive HNS crops with output less than £175,000 per hectare

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

- Table 2.17 All specialist HNS businesses
- Table 2.18 Intensive HNS crops – crop output more than £175,000 per hectare
- Table 2.19 Extensive HNS crops – crop output less than £175,000 per hectare

### **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 2.20 All other horticulture businesses
- Table 2.21 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 2021/22 was 2,438, while the total FBS sample for the 2021 cropping year was 130 businesses, representing 5.3% of the national population of eligible horticultural businesses.

**Table 2.1 FBS sample compared with eligible\* horticultural businesses for 2021**

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

	<b>England population 2021 June Survey (number of businesses)</b>	<b>FBS sample 2021 (number of businesses)</b>	<b>FBS sample as a % of population</b>
Specialist Glass	242	31	12.8%
Specialist Fruit	678	40	5.9%
Specialist HNS	640	20	3.1%
Other Horticulture	878	39	4.4%
<b>All Horticulture</b>	<b>2,438</b>	<b>130</b>	<b>5.3%</b>

The 'All Horticulture' group results are based on a sample of 130 businesses and no outliers have been removed from this group.

Within the four broad horticulture groups, approximately 70 crop types are recorded and they are grown in varying systems ranging from heated glasshouses to orchard fruit production, with market garden and Spanish tunnel production in between. Such diversity makes the raising of a representative sample very difficult, resulting in reporting often being based upon groups of a variety of similar but not identical activities to ensure minimum sample size criteria are met and the robustness of the data are maintained.

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/collections/farm-business-survey>

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 2021/22**

- The average profitability as measured by Farm Business Income (FBI) increased by 14.6% to £60,625 per business when compared with 2020/21
- Of the four horticultural groups, Specialist hardy nursery stock and Other horticulture businesses experienced an increase in profitability, while Specialist fruit and Specialist glass businesses showed a fall in profitability, albeit at different levels

## **2.5 Financial results for 2020/21 and 2021/22**

- 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 2020 and 2021 harvest years, together with premium results for the 2021 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
- Overall, the average Farm Business Income (FBI) of horticultural businesses increased by 14.6%, to £60,625 per business in 2021; average total gross output for the sector increased by 7.7%, to £440,354 per business, compared with 2020, while total costs increased by 6.6%
- Specialist glass and Hardy Nursery Stock businesses were the two more profitable sectors of horticulture, while Specialist Fruit and Other Horticulture remained at a lower base
- Where the data are derived from a sample of less than 15 holdings, there is a lower degree of confidence in the figures



## 2.6 Specialist Glass [Tables 2.4 to 2.12]

*There are nine tables reporting on the financial results of specialist glass businesses, 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 between businesses with 50% or more of crop output derived from glasshouse production (Tables 2.7 to 2.9) and those with 90% or more of crop output derived from glasshouse production (Tables 2.10 to 2.12)
- *Specialist glass, all crops [Table 2.4]*
  - The group includes both heated and unheated glasshouses and polytunnels
  - Average productive cropping area in 2021 was 4.2ha, of which protected production was 1.5ha
  - The sample of 31 specialist glass businesses is split between 14 businesses specialising in edible crops and 17 businesses specialising in ornamental crops
  - On a per business basis in 2021, Farm Business Income (FBI) fell by 18% to £83,393. However, although the edible sector had a much-improved year with FBI increasing by 23%, the ornamental sector experienced a fall in FBI of 41%
  - The composition of cropping for these holdings moved slightly towards the edible sector, with 53% of crop output derived from the ornamental sector compared with 63% in the previous year
- *Specialist glass, mainly edible crops [Table 2.5]*
  - Profitability for this group, at £92,298 per business, showed an increase of 23% compared to the previous year
  - The cropping area fell from 4.1ha to 2.9ha although the glasshouse area fell by just 5% between the two years
  - The Gross Margin and Farm Business Income per hectare increased in 2021/22
  - The financial performance of the premium group (top quartile) was 1.3 times higher than the average results in 2021, on a per hectare basis
- *Specialist glass, mainly ornamental crops [Table 2.6]*
  - In contrast to the edible group, profitability for this group decreased by 41% to £73,749 per business
  - Although there was a reduction in costs, the fall in Gross Output was greater
- *Specialist glass businesses (50% or more crop output from glasshouse production) [Tables 2.7 – 2.9]*
  - These three tables provide the results for all specialist glasshouse businesses where 50% or more of the output is derived from glasshouse production, and for the sub-groups of those specialising in the production of edible and ornamental crops
  - These groups are semi-intensive and still have significant outdoor cropping
- *Specialist glass businesses (90% or more crop output from glasshouse production) [Table 2.10]*
  - These tables provide the results for specialist glasshouse businesses where 90% or more of the output is derived from glasshouse production, with 10% or less from outdoor production
  - Average Farm Business Income (FBI) fell by 29% to £48,227 per business
  - Consequently, the edible sector is now more profitable than the ornament sector for protected crops

- *Specialist glass businesses (90% or more crop output from glasshouse production) – Mainly edible crops [Table 2.11]*
  - The data are derived from a modest sample size and thus there is a lower degree of confidence in the figures
  - Tomato production accounted for 73% and soft fruit 17% of all glasshouse output for this sample of businesses in 2021, compared with 47% and 17% in 2020, with the difference due to sample changes
  - The Gross Margin per hectare was almost identical in both years at £300,000, with an increase on output and a corresponding increase in variable costs, in particular glasshouse fuel, where the cost per hectare doubled
  - Average Farm Business Income increased from £30,078 to £56,982 per hectare, with a 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
- *Specialist glass businesses (90% or more crop output from glasshouse production) – Mainly ornamental crops [Table 2.12]*
  - The data are derived from a modest sample size and thus there is a lower degree of confidence in the figures
  - The ornamental sector had a very poor year with average Farm Business Income falling from £100,138 to £40,024 per hectare in 2021/22
  - Whilst the sample has contracted, an identical sample also showed a similar decline in profitability 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 2.13 to 2.16]

- There are four tables reporting on the financial results for this type group and its sub-groups:
  - Table 2.13 shows the results for all specialist fruit businesses
  - Table 2.14 shows a sub-group of this sample for businesses with over 90% of their total crop output derived from top fruit
  - Tables 2.15 and 2.16 splits this down further to a group excluding cider apple growers and a group of predominantly cider apple growers
- *Specialist fruit businesses [Table 2.13]*
  - Within the specialist fruit group in 2021, crop output was made up from 50% top fruit, 48% soft fruit and 2% other crops
  - Profitability for this group fell by 7% to £33,410 in 2021/22
  - The average cropping area was similar in both years at approximately 19 ha
  - 30% 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 2.14]*
  - This group includes businesses that specialise in top fruit production, with 90% or more of their total crop output derived from top fruit
  - In 2021, approximately 66% of crop output was derived from dessert & culinary apples, 9% from cider apples, 6% pears and 4% from plums
  - Although the average price of dessert apples increased to £633/t, it could not compensate for the larger reduction in average yields that fell to 21.2 t/ha

- The average price of fruit does not reveal the very wide variation in prices with some fruit achieving Grade 1 supermarket prices while less marketable fruit only achieve juicing prices
- Average Farm Business Income (FBI) was negative in 2021/22 at -£4,135 per business and -£239 per hectare, both less than the previous year
- *Mainly top fruit businesses – 90% or more crop output derived from top fruit, excluding cider apple growers [Table 2.15]*
  - This sub-group of specialist top fruit growers consists of 19 growers in 2021, predominantly growing top fruit for eating
  - The average area for these holdings remained at 14 ha, and average Farm Business Income fell to -£982/ha
- *Mainly top fruit businesses – 90% or more crop output derived from cider apples [Table 2.16]*
  - The data are derived from a modest sample size and thus there is a lower degree of confidence in the figures
  - The cropping area declined by 12% and was 37ha in 2021/22
  - Average yields of cider apples increased from 20 t/ha to 31 t/ha in 2021/22, and although the average price fell from £128/t to £116/t, this led to a higher output per hectare, thus increasing Farm Business Income from £593 to £1,660 per hectare in 2021/22

**Table 2.2 Top fruit yields, prices and output\* – 2020/21 and 2021/22**

Top Fruit		2020/21	2021/22
Culinary Apples	tonnes/ha	24.4	19.2
	£/tonne	444	471
	<b>£ output/ha</b>	<b>10,833</b>	<b>9,065</b>
Dessert Apples	tonnes/ha	28.6	21.2
	£/tonne	593	633
	<b>£ output/ha</b>	<b>16,397</b>	<b>13,013</b>
Cider Apples	tonnes/ha	20.3	31.2
	£/tonne	128	116
	<b>£ output/ha</b>	<b>2,607</b>	<b>3,634</b>
Pears	tonnes/ha	8.6	6.9
	£/tonne	687	979
	<b>£ output/ha</b>	<b>5,910</b>	<b>6,727</b>

**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 2.17 to 2.19]

- There are three tables reporting on the financial results of Specialist Hardy Nursery Stock (HNS) businesses:
  - Table 2.17 covers all HNS businesses in the sample with tables 2.18 and 2.19 being sub-groups of the main sample
  - Table 2.18 is for businesses that have a crop output of more than £175,000 per hectare
  - Table 2.19 is for businesses that have a crop output of less than £175,000 per hectare
- *Specialist HNS businesses [Table 2.17]*
  - 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, 80% of crop output was derived from outdoor production and 20% was derived from protected production
  - Total gross output increased by 4%, while total costs fell by 2%, which led to an increase in Farm Business Income (FBI) per business of 32% to £118,263
  - Premium businesses from this group produced an average FBI of £109,348/ha compared with the average of £66,761/ha in 2021/22
- *Intensive HNS businesses (crop output more than £175,000 per hectare) [Table 2.18]*
  - The sub-group covers businesses with a crop output of more than £175,000 per hectare
  - These businesses grow a significant amount of HNS under glass or walk-through polythene tunnels as well as outdoors on hard standings, and also higher value field crops.
  - Profitability increased by 18% to £129,241 in 2021/22, with a reduction in total costs
- *Extensive HNS businesses (crop output less than £175,000 per hectare) [Table 2.19]*
  - The table refers to a group of businesses with crop output of less than £175,000 per hectare, including rootstock and larger trees, as well as shrubs and smaller nursery stock
  - These businesses derive far less of their crop output from under glass or polythene (10%), with the vast majority coming from outdoor stock (90%)
  - Farm Business Income (FBI) increased to £87,080 per business, or £26,765 per hectare

## 2.9 Other Horticulture [Tables 2.20 and 2.21]

- *Other horticultural businesses [Table 2.20]*
  - 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 2021/22, soft fruit accounted for 39% of crop, followed by farm crops at 24%, outdoor vegetables at 8% and glasshouse crops at 15%
  - Farm profitability increased by 21% to £33,350 per business
  - Premium businesses recorded an FBI per hectare of £7,052, compared to the average of £1,339
- *Mainly outdoor vegetables – 50% or more output derived from outdoor vegetables [Table 2.21]*
  - Sub-group of other horticultural businesses with more than 50% of output derived from outdoor vegetable production
  - Average cropping area of this group remained constant, averaging 8.7ha in 2021/22
  - Farm Business Income (FBI) per hectare increased £443/ha to £1,678/ha
  - Gross output per hectare increased by 10% while total costs increased by 8%

## **2.10 Balance Sheet Information [Tables 2.22 and 2.23]**

- The assets, liabilities and net worth for the horticulture sample are reported in table 2.22
- Table 2.23 reports on the net worth and percentage equity for the Defra main farm type classifications used in England; the average net worth for all farm types is approximately £2.1 million per business, representing 88.6% equity (proportion of assets over liabilities)
- The percentage equity for all horticultural businesses was 84% in 2021/22, although the average net worth of £922,000 is lower than the 'All farms'
- Those businesses that are predominantly land based have the highest net worth, while those with intensive livestock systems and less land have a lower net worth and percentage equity

**Table 2.3 All horticultural businesses**

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21	2021/22	2020/21	2021/22	2020/21	2021/22
Number of businesses	147	130	147	130	147	130
Productive cropping area (ha)	14.12	15.11	14.12	15.11		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>409,056</b>	<b>440,354</b>	<b>28,961</b>	<b>29,134</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	65,682	64,388	4,650	4,260	16.1	14.6
Fertilisers & composts	11,868	12,099	840	800	2.9	2.7
Crop protection	7,620	9,607	540	636	1.9	2.2
Market charges	22,929	22,686	1,623	1,501	5.6	5.2
Packing materials	17,708	19,859	1,254	1,314	4.3	4.5
Horticultural sundries	14,132	19,080	1,001	1,262	3.5	4.3
Glasshouse fuel	3,465	4,351	245	288	0.8	1.0
Other variable costs	277	539	20	36	0.1	0.1
<b>Total variable costs</b>	<b>143,680</b>	<b>152,609</b>	<b>10,173</b>	<b>10,097</b>	<b>35.1</b>	<b>34.7</b>
<b>Total gross margin</b>	<b>265,376</b>	<b>287,745</b>	<b>18,789</b>	<b>19,037</b>	<b>64.9</b>	<b>65.3</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	70,240	74,954	4,973	4,959	17.2	17.0
Regular unpaid	32,075	34,351	2,271	2,273	7.8	7.8
Casual labour	46,155	49,245	3,268	3,258	11.3	11.2
Power & machinery costs:						
Contract & hire	7,128	9,255	505	612	1.7	2.1
Fuel & electricity	12,463	14,132	882	935	3.0	3.2
Repairs	8,227	9,585	582	634	2.0	2.2
Machinery depreciation	12,273	10,526	869	696	3.0	2.4
Glasshouse depreciation	3,016	2,233	214	148	0.7	0.5
Rent (incl. imputed)	17,510	19,510	1,240	1,291	4.3	4.4
Other costs:						
Occupier's repairs	6,313	8,002	447	529	1.5	1.8
Permanent crop depreciation	2,183	3,454	155	229	0.5	0.8
Water	1,787	1,624	127	107	0.4	0.4
Sundries	19,066	21,478	1,350	1,421	4.7	4.9
<b>Total fixed costs</b>	<b>238,436</b>	<b>258,350</b>	<b>16,881</b>	<b>17,093</b>	<b>58.3</b>	<b>58.7</b>
<b>Management &amp; investment income</b>	<b>26,940</b>	<b>29,395</b>	<b>1,907</b>	<b>1,945</b>	<b>6.6</b>	<b>6.7</b>
Minus: management salaries	216	138	15	9	0.1	0.0
Plus: farmer & spouse labour	25,304	26,961	1,792	1,784	6.2	6.1
<b>Net farm income</b>	<b>52,027</b>	<b>56,217</b>	<b>3,684</b>	<b>3,719</b>	<b>12.7</b>	<b>12.8</b>
<b>Farm business income</b>	<b>52,923</b>	<b>60,625</b>	<b>3,747</b>	<b>4,011</b>	<b>12.9</b>	<b>13.8</b>

**Crop output per cent of total crop output (%)**

	<b>Average 2020/21</b>	<b>Average 2021/22</b>
Glasshouse crops		
Flowers & nursery stock	22.7	17.9
Tomatoes	1.6	1.7
Lettuce	0.1	0.1
Soft fruit	3.0	2.9
Other glasshouse crops	4.9	4.5
Outdoor crops		
Flowers and nursery stock	30.9	33.5
Vegetables	2.5	1.1
Other outdoor crops	6.0	7.1
Top fruit		
Dessert apples and pears	5.5	7.3
Culinary apples	0.5	0.4
Cider apples	0.5	1.0
Plums	0.5	0.5
Other top fruit	0.7	1.7
Soft fruit		
Strawberries	9.7	10.1
Raspberries	8.4	7.1
Blackcurrants	0.1	0.1
Other soft fruit	2.4	3.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

**Distribution of tenant's type capital (%)**

	<b>Average 2020/21</b>	<b>Average 2021/22</b>
Crops and tillages	16	14
Stores	8	6
Glasshouses	8	6
Equipment	26	24
Livestock	0	0
Other	43	49
<b>Total</b>	<b>100</b>	<b>100</b>

<b>Tenant's capital (£)</b>	<b>580,943</b>	<b>643,953</b>
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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>	
	2020/21	2021/22	2020/21	2021/22	2020/21	2021/22
Number of businesses	39	31	39	31	39	31
Productive cropping area (ha)	4.29	4.18	4.29	4.18		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>865,251</b>	<b>741,343</b>	<b>201,710</b>	<b>177,252</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	157,925	128,616	36,816	30,752	18.3	17.3
Fertilisers & composts	34,387	28,748	8,016	6,874	4.0	3.9
Crop protection	6,384	6,358	1,488	1,520	0.7	0.9
Market charges	30,785	16,705	7,177	3,994	3.6	2.3
Packing materials	27,254	21,485	6,354	5,137	3.1	2.9
Horticultural sundries	35,597	33,378	8,299	7,981	4.1	4.5
Glasshouse fuel	29,893	39,964	6,969	9,555	3.5	5.4
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>322,224</b>	<b>275,254</b>	<b>75,118</b>	<b>65,812</b>	<b>37.2</b>	<b>37.1</b>
<b>Total gross margin</b>	<b>543,027</b>	<b>466,089</b>	<b>126,592</b>	<b>111,440</b>	<b>62.8</b>	<b>62.9</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	200,299	172,968	46,694	41,356	23.1	23.3
Regular unpaid	35,701	36,605	8,323	8,752	4.1	4.9
Casual labour	53,987	49,985	12,586	11,951	6.2	6.7
Power & machinery costs:						
Contract & hire	9,329	5,218	2,175	1,248	1.1	0.7
Fuel & electricity	28,263	27,583	6,589	6,595	3.3	3.7
Repairs	15,026	12,949	3,503	3,096	1.7	1.7
Machinery depreciation	20,096	16,235	4,685	3,882	2.3	2.2
Glasshouse depreciation	22,869	15,698	5,331	3,753	2.6	2.1
Rent (incl. imputed)	19,240	17,766	4,485	4,248	2.2	2.4
Other costs:						
Occupier's repairs	15,927	14,975	3,713	3,580	1.8	2.0
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	2,922	2,823	681	675	0.3	0.4
Sundries	32,328	31,920	7,537	7,632	3.7	4.3
<b>Total fixed costs</b>	<b>455,987</b>	<b>404,725</b>	<b>106,301</b>	<b>96,768</b>	<b>52.7</b>	<b>54.6</b>
<b>Management &amp; investment income</b>	<b>87,039</b>	<b>61,364</b>	<b>20,291</b>	<b>14,672</b>	<b>10.1</b>	<b>8.3</b>
Minus: management salaries	709	439	165	105	0.1	0.1
Plus: farmer & spouse labour	30,508	31,800	7,112	7,603	3.5	4.3
<b>Net farm income</b>	<b>116,838</b>	<b>92,725</b>	<b>27,238</b>	<b>22,170</b>	<b>13.5</b>	<b>12.5</b>
<b>Farm business income</b>	<b>101,156</b>	<b>83,393</b>	<b>23,582</b>	<b>19,939</b>	<b>11.7</b>	<b>11.2</b>



Premium businesses	Per hectare	Per £100 of gross output	Crop output per cent of total crop output (%)			
	2021/22^	2021/22^		Average 2020/21	Average 2021/22	Premium 2021/22^
Number of businesses	9	9				
Productive cropping area (ha)	4.62		Glasshouse crops			
			Flowers & nursery stock	54.9	50.3	38.6
	£ per hectare	average %	Tomatoes	7.3	10.4	25.7
			Lettuce	0.2	0.2	0.0
Gross output	298,974	100.0	Soft fruit	7.9	9.8	18.1
			Other glasshouse crops	20.5	24.8	12.0
Variable costs						
Seed & young plants	28,308	9.5	Outdoor crops			
Fertilisers & composts	7,014	2.3	Flowers & nursery stock	8.1	3.1	3.4
Crop protection	2,176	0.7	Vegetables	0.1	0.1	0.0
			Fruit	0.6	0.8	2.1
Market charges	7,327	2.5	Other outdoor crops	0.3	0.5	0.0
Packing materials	7,581	2.5				
Horticultural sundries	6,354	2.1	Total	100.0	100.0	100.0
Glasshouse fuel	25,602	8.6				
Other variable costs	0	0.0				
Total variable costs	84,362	28.2	Distribution of tenant's type capital (%)			
Total gross margin	214,612	71.8		Average 2020/21	Average 2021/22	Premium 2021/22^
Fixed costs						
Labour:			Crops & tillages	4	5	4
Regular paid	61,851	20.7	Stores	9	8	3
Regular unpaid	9,486	3.2	Glasshouses	28	28	31
Casual labour	21,118	7.1	Equipment	19	23	20
			Livestock	0	0	0
Power & machinery costs:			Other	40	36	43
Contract & hire	2,115	0.7				
Fuel & electricity	6,729	2.3	Total	100	100	100
Repairs	7,448	2.5				
Machinery depreciation	7,286	2.4				
Glasshouse depreciation	8,700	2.9	Tenant's capital (£)	1,288,619	967,001	2,276,367
Rent (incl. imputed)	5,800	1.9				
Other costs:						
Occupier's repairs	6,482	2.2				
Permanent crop depreciation	0	0.0				
Water	577	0.2				
Sundries	15,352	5.1				
Total fixed costs	152,945	51.2				
Management & investment income	61,667	20.6				
Minus: management salaries	382	0.1				
Plus: farmer & spouse labour	8,432	2.8				
Net farm income	69,717	23.3				
Farm business income	68,748	23.0				

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

**Table 2.5 Specialist glass businesses, mainly edible crops**

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21	2021/22 <sup>^</sup>	2020/21	2021/22 <sup>^</sup>	2020/21	2021/22 <sup>^</sup>
Number of businesses	17	14	17	14	17	14
Productive cropping area (ha)	4.14	2.86	4.14	2.86		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>669,764</b>	<b>666,314</b>	<b>161,964</b>	<b>233,129</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	82,969	67,444	20,064	23,597	12.4	10.1
Fertilisers & composts	30,763	41,505	7,439	14,522	4.6	6.2
Crop protection	5,681	7,329	1,374	2,564	0.8	1.1
Market charges	16,111	17,998	3,896	6,297	2.4	2.7
Packing materials	9,556	12,176	2,311	4,260	1.4	1.8
Horticultural sundries	49,817	30,639	12,047	10,720	7.4	4.6
Glasshouse fuel	33,827	63,137	8,180	22,090	5.1	9.5
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>228,724</b>	<b>240,227</b>	<b>55,311</b>	<b>84,050</b>	<b>34.1</b>	<b>36.1</b>
<b>Total gross margin</b>	<b>441,040</b>	<b>426,087</b>	<b>106,654</b>	<b>149,079</b>	<b>65.9</b>	<b>63.9</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	160,523	154,240	38,818	53,965	24.0	23.1
Regular unpaid	33,151	31,375	8,017	10,977	4.9	4.7
Casual labour	40,253	42,188	9,734	14,761	6.0	6.3
Power & machinery costs:						
Contract & hire	2,902	4,249	702	1,487	0.4	0.6
Fuel & electricity	33,915	23,521	8,201	8,229	5.1	3.5
Repairs	10,745	10,401	2,599	3,639	1.6	1.6
Machinery depreciation	15,217	15,073	3,680	5,274	2.3	2.3
Glasshouse depreciation	24,629	18,135	5,956	6,345	3.7	2.7
Rent (incl. imputed)	16,547	15,801	4,002	5,528	2.5	2.4
Other costs:						
Occupier's repairs	13,097	14,188	3,167	4,964	2.0	2.1
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	3,770	3,789	912	1,326	0.6	0.6
Sundries	21,085	15,973	5,099	5,589	3.1	2.4
<b>Total fixed costs</b>	<b>375,836</b>	<b>348,932</b>	<b>90,886</b>	<b>122,084</b>	<b>56.1</b>	<b>52.4</b>
<b>Management &amp; investment income</b>	<b>65,204</b>	<b>77,155</b>	<b>15,768</b>	<b>26,995</b>	<b>9.7</b>	<b>11.6</b>
Minus: management salaries	178	177	43	62	0.0	0.0
Plus: farmer & spouse labour	29,355	27,625	7,099	9,665	4.4	4.1
<b>Net farm income</b>	<b>94,381</b>	<b>104,603</b>	<b>22,823</b>	<b>36,598</b>	<b>14.1</b>	<b>15.7</b>
<b>Farm business income</b>	<b>75,061</b>	<b>92,298</b>	<b>18,152</b>	<b>32,293</b>	<b>11.2</b>	<b>13.9</b>

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

Premium businesses	Per hectare	Per £100 of gross output	Crop output per cent of total crop output (%)			
	2021/22^	2021/22^		Average 2020/21	Average 2021/22^	Premium 2021/22^
Number of businesses	7	7				
Productive cropping area (ha)	8.61		Glasshouse crops			
			Flowers & nursery stock	2.6	3.0	3.3
	£ per hectare	average %	Tomatoes	19.8	21.8	23.7
			Lettuce	0.5	0.4	0.0
Gross output	281,075	100.0	Soft fruit	21.5	20.7	16.7
			Other glasshouse crops	53.3	52.1	54.3
Variable costs						
Seed & young plants	28,766	10.2	Outdoor crops			
Fertilisers & composts	18,078	6.4	Flowers & nursery stock	0.0	0.0	0.0
Crop protection	3,149	1.1	Vegetables	0.3	0.2	0.0
			Fruit	1.6	1.8	1.9
Market charges	4,446	1.6	Other outdoor crops	0.4	0.0	0.0
Packing materials	5,031	1.8				
Horticultural sundries	12,019	4.3	Total	100.0	100.0	100.0
Glasshouse fuel	27,996	10.0				
Other variable costs	0	0.0				
Total variable costs	99,486	35.4	Distribution of tenant's type capital (%)			
Total gross margin	181,589	64.6		Average 2020/21	Average 2021/22^	Premium 2021/22^
Fixed costs						
Labour:			Crops & tillages	1	1	1
Regular paid	69,205	24.6	Stores	5	7	7
Regular unpaid	3,690	1.3	Glasshouses	34	36	39
Casual labour	13,680	4.9	Equipment	18	25	23
			Livestock	0	0	0
Power & machinery costs:			Other	42	31	30
Contract & hire	1,946	0.7				
Fuel & electricity	9,784	3.5	Total	100	100	100
Repairs	4,162	1.5				
Machinery depreciation	6,065	2.2				
Glasshouse depreciation	8,071	2.9	Tenant's capital (£)	1,076,570	874,136	3,100,989
Rent (incl. imputed)	5,735	2.0				
Other costs:						
Occupier's repairs	5,859	2.1				
Permanent crop depreciation	0	0.0				
Water	1,194	0.4				
Sundries	5,955	2.1				
Total fixed costs	135,344	48.2				
Management & investment income	46,245	16.5				
Minus: management salaries	81	0.0				
Plus: farmer & spouse labour	2,855	1.0				
Net farm income	49,019	17.4				
Farm business income	42,747	15.2				

**Table 2.6 Specialist glass businesses, mainly ornamental crops\***

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21	2021/22	2020/21	2021/22	2020/21	2021/22
Number of businesses	22	17	22	17	22	17
Productive cropping area (ha)	4.43	5.62	4.43	5.62		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>1,037,877</b>	<b>822,597</b>	<b>234,504</b>	<b>146,459</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	224,115	194,863	50,638	34,694	21.6	23.7
Fertilisers & composts	37,587	14,933	8,493	2,659	3.6	1.8
Crop protection	7,004	5,307	1,583	945	0.7	0.6
Market charges	43,743	15,304	9,884	2,725	4.2	1.9
Packing materials	42,883	31,566	9,689	5,620	4.1	3.8
Horticultural sundries	23,040	36,345	5,206	6,471	2.2	4.4
Glasshouse fuel	26,419	14,869	5,969	2,647	2.5	1.8
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>404,790</b>	<b>313,188</b>	<b>91,461</b>	<b>55,761</b>	<b>39.0</b>	<b>38.1</b>
<b>Total gross margin</b>	<b>633,086</b>	<b>509,410</b>	<b>143,043</b>	<b>90,698</b>	<b>61.0</b>	<b>61.9</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	235,423	193,251	53,193	34,407	22.7	23.5
Regular unpaid	37,952	42,270	8,575	7,526	3.7	5.1
Casual labour	66,115	58,429	14,938	10,403	6.4	7.1
Power & machinery costs:						
Contract & hire	15,004	6,267	3,390	1,116	1.4	0.8
Fuel & electricity	23,272	31,982	5,258	5,694	2.2	3.9
Repairs	18,806	15,709	4,249	2,797	1.8	1.9
Machinery depreciation	24,404	17,492	5,514	3,114	2.4	2.1
Glasshouse depreciation	21,315	13,058	4,816	2,325	2.1	1.6
Rent (incl. imputed)	21,617	19,894	4,884	3,542	2.1	2.4
Other costs:						
Occupier's repairs	18,426	15,827	4,163	2,818	1.8	1.9
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	2,173	1,777	491	316	0.2	0.2
Sundries	42,257	49,191	9,548	8,758	4.1	6.0
<b>Total fixed costs</b>	<b>526,765</b>	<b>465,147</b>	<b>119,020</b>	<b>82,817</b>	<b>50.8</b>	<b>56.5</b>
<b>Management &amp; investment income</b>	<b>106,321</b>	<b>44,263</b>	<b>24,023</b>	<b>7,881</b>	<b>10.2</b>	<b>5.4</b>
Minus: management salaries	1,178	722	266	129	0.1	0.1
Plus: farmer & spouse labour	31,525	36,321	7,123	6,467	3.0	4.4
<b>Net farm income</b>	<b>136,669</b>	<b>79,862</b>	<b>30,880</b>	<b>14,219</b>	<b>13.2</b>	<b>9.7</b>
<b>Farm business income</b>	<b>124,198</b>	<b>73,749</b>	<b>28,062</b>	<b>13,131</b>	<b>12.0</b>	<b>9.0</b>

**Crop output per cent of total crop output (%)**

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	Average 2020/21	Average 2021/22
Glasshouse crops		
Flowers & nursery stock	85.5	93.1
Tomatoes	0.0	0.0
Lettuce	0.0	0.0
Soft fruit	0.0	0.0
Other glasshouse crops	1.3	0.0
Outdoor crops		
Flowers & nursery stock	12.9	5.9
Vegetables	0.0	0.0
Fruit	0.0	0.0
Other outdoor crops	0.3	0.9
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

**Distribution of tenant's type capital (%)**

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	Average 2020/21	Average 2021/22
Crops & tillages	6	8
Stores	11	8
Glasshouses	24	20
Equipment	20	22
Livestock	0	0
Other	39	41
<b>Total</b>	<b>100</b>	<b>100</b>
 <b>Tenant's capital (£)</b>	 <b>1,288,619</b>	 <b>967,001</b>

*\* no premium figures, sample too small*

**Table 2.7 Specialist glass businesses (50% or more of crop output from glasshouse production)**

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21	2021/22	2020/21	2021/22	2020/21	2021/22
Number of businesses	29	19	29	19	29	19
Productive cropping area (ha)	1.54	1.02	1.54	1.02		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>821,157</b>	<b>625,587</b>	<b>533,954</b>	<b>611,849</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	128,682	88,483	83,675	86,539	15.7	14.1
Fertilisers & composts	31,387	15,657	20,409	15,313	3.8	2.5
Crop protection	6,027	4,079	3,919	3,989	0.7	0.7
Market charges	39,301	25,318	25,555	24,762	4.8	4.0
Packing materials	35,521	28,454	23,097	27,829	4.3	4.5
Horticultural sundries	27,235	22,711	17,709	22,213	3.3	3.6
Glasshouse fuel	35,785	61,524	23,269	60,173	4.4	9.8
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>303,938</b>	<b>246,226</b>	<b>197,634</b>	<b>240,819</b>	<b>37.0</b>	<b>39.4</b>
<b>Total gross margin</b>	<b>517,220</b>	<b>379,361</b>	<b>336,320</b>	<b>371,031</b>	<b>63.0</b>	<b>60.6</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	199,464	132,734	129,701	129,819	24.3	21.2
Regular unpaid	37,350	39,519	24,287	38,651	4.5	6.3
Casual labour	53,501	51,878	34,789	50,739	6.5	8.3
Power & machinery costs:						
Contract & hire	11,099	5,378	7,217	5,260	1.4	0.9
Fuel & electricity	21,811	24,275	14,183	23,742	2.7	3.9
Repairs	15,773	14,198	10,257	13,886	1.9	2.3
Machinery depreciation	20,401	16,022	13,266	15,670	2.5	2.6
Glasshouse depreciation	28,918	24,394	18,804	23,858	3.5	3.9
Rent (incl. imputed)	16,015	9,993	10,414	9,773	2.0	1.6
Other costs:						
Occupier's repairs	17,395	17,034	11,311	16,660	2.1	2.7
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	2,718	2,045	1,767	2,000	0.3	0.3
Sundries	31,100	21,724	20,223	21,246	3.8	3.5
<b>Total fixed costs</b>	<b>455,545</b>	<b>359,194</b>	<b>296,217</b>	<b>351,306</b>	<b>55.5</b>	<b>57.4</b>
<b>Management &amp; investment income</b>	<b>61,674</b>	<b>20,168</b>	<b>40,103</b>	<b>19,725</b>	<b>7.5</b>	<b>3.2</b>
Minus: management salaries	662	0	430	0	0.1	0.0
Plus: farmer & spouse labour	31,274	33,189	20,336	32,460	3.8	5.3
<b>Net farm income</b>	<b>92,287</b>	<b>53,357</b>	<b>60,009</b>	<b>52,185</b>	<b>11.2</b>	<b>8.5</b>
<b>Farm business income</b>	<b>77,364</b>	<b>42,471</b>	<b>50,306</b>	<b>41,538</b>	<b>9.4</b>	<b>6.8</b>

Premium businesses	Per hectare	Per £100 of gross output	Crop output per cent of total crop output (%)			
	2021/22^	2021/22^		Average 2020/21	Average 2021/22	Premium 2021/22^
Number of businesses	6	6				
Productive cropping area (ha)	1.60		Glasshouse crops			
			Flowers & nursery stock	63.9	63.7	56.4
	£ per hectare	average %	Tomatoes	11.0	24.4	40.4
			Lettuce	0.3	0.5	0.0
Gross output	1,036,407	100.0	Soft fruit	4.0	5.9	0.0
			Other glasshouse crops	9.7	2.6	1.1
Variable costs						
Seed & young plants	121,484	11.7	Outdoor crops			
Fertilisers & composts	19,086	1.8	Flowers & nursery stock	11.0	2.9	2.0
Crop protection	5,148	0.5	Vegetables	0.1	0.0	0.0
			Fruit	0.0	0.0	0.0
Market charges	30,363	2.9	Other outdoor crops	0.0	0.0	0.0
Packing materials	42,189	4.1				
Horticultural sundries	25,105	2.4	Total	100.0	100.0	100.0
Glasshouse fuel	136,037	13.1				
Other variable costs	0	0.0				
Total variable costs	379,412	36.6	Distribution of tenant's type capital (%)			
Total gross margin	656,996	63.4		Average 2020/21	Average 2021/22	Premium 2021/22^
Fixed costs						
Labour:			Crops & tillages	3	2	1
Regular paid	142,665	13.8	Stores	8	5	4
Regular unpaid	27,456	2.6	Glasshouses	31	41	43
Casual labour	101,142	9.8	Equipment	18	22	22
			Livestock	0	0	0
Power & machinery costs:			Other	40	30	31
Contract & hire	10,168	1.0				
Fuel & electricity	34,439	3.3	Total	100	100	100
Repairs	31,122	3.0				
Machinery depreciation	30,802	3.0				
Glasshouse depreciation	45,538	4.4	Tenant's capital (£)	1,444,558	1,000,725	2,965,470
Rent (incl. imputed)	6,975	0.7				
Other costs:						
Occupier's repairs	26,189	2.5				
Permanent crop depreciation	0	0.0				
Water	1,853	0.2				
Sundries	19,274	1.9				
Total fixed costs	477,624	46.1				
Management & investment income	179,371	17.3				
Minus: management salaries	0	0.0				
Plus: farmer & spouse labour	19,907	1.9				
Net farm income	199,278	19.2				
Farm business income	184,953	17.8				

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

**Table 2.8 Specialist glass businesses (50% 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>	
	<b>2020/21<sup>^</sup></b>	<b>2021/22<sup>^</sup></b>	<b>2020/21<sup>^</sup></b>	<b>2021/22<sup>^</sup></b>	<b>2020/21<sup>^</sup></b>	<b>2021/22<sup>^</sup></b>
Number of businesses	11	8	11	8	11	8
Productive cropping area (ha)	1.17	0.92	1.17	0.92		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>447,492</b>	<b>423,100</b>	<b>383,587</b>	<b>459,842</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	32,593	19,293	27,938	20,969	7.3	4.6
Fertilisers & composts	13,590	14,787	11,649	16,071	3.0	3.5
Crop protection	3,407	2,111	2,920	2,294	0.8	0.5
Market charges	17,252	21,724	14,788	23,610	3.9	5.1
Packing materials	8,171	6,085	7,004	6,614	1.8	1.4
Horticultural sundries	23,738	12,313	20,348	13,383	5.3	2.9
Glasshouse fuel	50,679	92,142	43,442	100,144	11.3	21.8
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>149,430</b>	<b>168,455</b>	<b>128,090</b>	<b>183,084</b>	<b>33.4</b>	<b>39.8</b>
<b>Total gross margin</b>	<b>298,062</b>	<b>254,645</b>	<b>255,497</b>	<b>276,758</b>	<b>66.6</b>	<b>60.2</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	103,963	75,220	89,116	81,752	23.2	17.8
Regular unpaid	32,077	29,428	27,496	31,984	7.2	7.0
Casual labour	32,202	21,743	27,604	23,631	7.2	5.1
Power & machinery costs:						
Contract & hire	3,567	5,466	3,058	5,941	0.8	1.3
Fuel & electricity	12,309	10,714	10,552	11,645	2.8	2.5
Repairs	12,245	9,610	10,496	10,445	2.7	2.3
Machinery depreciation	13,862	15,493	11,883	16,838	3.1	3.7
Glasshouse depreciation	34,965	28,398	29,972	30,865	7.8	6.7
Rent (incl. imputed)	9,256	6,548	7,934	7,116	2.1	1.5
Other costs:						
Occupier's repairs	10,701	14,121	9,173	15,348	2.4	3.3
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	3,077	2,372	2,638	2,578	0.7	0.6
Sundries	17,331	9,370	14,856	10,184	3.9	2.2
<b>Total fixed costs</b>	<b>285,555</b>	<b>228,485</b>	<b>244,776</b>	<b>248,327</b>	<b>63.8</b>	<b>54.0</b>
<b>Management &amp; investment income</b>	<b>12,507</b>	<b>26,160</b>	<b>10,721</b>	<b>28,432</b>	<b>2.8</b>	<b>6.2</b>
Minus: management salaries	0	0	0	0	0.0	0.0
Plus: farmer & spouse labour	27,805	28,085	23,835	30,523	6.2	6.6
<b>Net farm income</b>	<b>40,312</b>	<b>54,245</b>	<b>34,556</b>	<b>58,955</b>	<b>9.0</b>	<b>12.8</b>
<b>Farm business income</b>	<b>30,270</b>	<b>48,683</b>	<b>25,947</b>	<b>52,911</b>	<b>6.8</b>	<b>11.5</b>

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures



**Crop output per cent of total crop output (%)**

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	Average 2020/21^	Average 2021/22^
Glasshouse crops		
Flowers & nursery stock	0.0	0.0
Tomatoes	45.9	73.0
Lettuce	1.1	1.5
Soft fruit	16.8	17.7
Other glasshouse crops	35.6	7.7
Outdoor crops		
Flowers & nursery stock	0.0	0.0
Vegetables	0.6	0.0
Fruit	0.0	0.0
Other outdoor crops	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

**Distribution of tenant's type capital (%)**

---

	Average 2020/21^	Average 2021/22^
Crops & tillages	0	0
Stores	2	2
Glasshouses	42	55
Equipment	15	24
Livestock	0	0
Other	40	20
<b>Total</b>	<b>100</b>	<b>100</b>

<b>Tenant's capital (£)</b>	<b>1,223,543</b>	<b>905,976</b>
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*\* no premium figures, sample too small*

**Table 2.9 Specialist glass businesses (50% or more of crop output from glasshouse production) - mainly ornamental crops\***

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21	2021/22^	2020/21	2021/22^	2020/21	2021/22^
Number of businesses	18	11	18	11	18	11
Productive cropping area (ha)	1.84	1.16	1.84	1.16		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>1,124,356</b>	<b>904,557</b>	<b>611,348</b>	<b>777,465</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	206,651	183,806	112,362	157,981	18.4	20.3
Fertilisers & composts	45,828	16,856	24,918	14,488	4.1	1.9
Crop protection	8,154	6,790	4,433	5,836	0.7	0.8
Market charges	57,191	30,271	31,097	26,018	5.1	3.3
Packing materials	57,713	59,271	31,380	50,943	5.1	6.6
Horticultural sundries	30,072	37,037	16,351	31,833	2.7	4.1
Glasshouse fuel	23,700	19,340	12,887	16,623	2.1	2.1
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>429,308</b>	<b>353,371</b>	<b>233,428</b>	<b>303,722</b>	<b>38.2</b>	<b>39.1</b>
<b>Total gross margin</b>	<b>695,047</b>	<b>551,185</b>	<b>377,919</b>	<b>473,743</b>	<b>61.8</b>	<b>60.9</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	276,954	211,973	150,589	182,190	24.6	23.4
Regular unpaid	41,628	53,420	22,635	45,915	3.7	5.9
Casual labour	70,783	93,395	38,487	80,273	6.3	10.3
Power & machinery costs:						
Contract & hire	17,211	5,256	9,358	4,517	1.5	0.6
Fuel & electricity	29,521	42,959	16,051	36,923	2.6	4.7
Repairs	18,637	20,519	10,133	17,636	1.7	2.3
Machinery depreciation	25,706	16,752	13,977	14,398	2.3	1.9
Glasshouse depreciation	24,012	18,876	13,056	16,224	2.1	2.1
Rent (incl. imputed)	21,500	14,739	11,690	12,668	1.9	1.6
Other costs:						
Occupier's repairs	22,826	21,046	12,411	18,089	2.0	2.3
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	2,427	1,596	1,320	1,371	0.2	0.2
Sundries	42,273	38,743	22,985	33,299	3.8	4.3
<b>Total fixed costs</b>	<b>593,478</b>	<b>539,274</b>	<b>322,693</b>	<b>463,505</b>	<b>52.8</b>	<b>59.6</b>
<b>Management &amp; investment income</b>	<b>101,569</b>	<b>11,912</b>	<b>55,227</b>	<b>10,238</b>	<b>9.0</b>	<b>1.3</b>
Minus: management salaries	1,199	0	652	0	0.1	0.0
Plus: farmer & spouse labour	34,089	40,222	18,535	34,571	3.0	4.4
<b>Net farm income</b>	<b>134,459</b>	<b>52,134</b>	<b>73,110</b>	<b>44,809</b>	<b>12.0</b>	<b>5.8</b>
<b>Farm business income</b>	<b>115,577</b>	<b>33,912</b>	<b>62,843</b>	<b>29,147</b>	<b>10.3</b>	<b>3.7</b>

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

**Crop output per cent of total crop output (%)**

---

	Average 2020/21	Average 2021/22^
Glasshouse crops		
Flowers & nursery stock	84.0	95.7
Tomatoes	0.0	0.0
Lettuce	0.0	0.0
Soft fruit	0.0	0.0
Other glasshouse crops	1.6	0.0
Outdoor crops		
Flowers & nursery stock	14.4	4.3
Vegetables	0.0	0.0
Fruit	0.0	0.0
Other outdoor crops	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

**Distribution of tenant's type capital (%)**

---

	Average 2020/21	Average 2021/22^
Crops & tillages	5	5
Stores	12	9
Glasshouses	25	26
Equipment	19	19
Livestock	0	0
Other	40	41
<b>Total</b>	<b>100</b>	<b>100</b>
<b>Tenant's capital (£)</b>	<b>1,288,619</b>	<b>967,001</b>

\* no premium figures, sample too small

**Table 2.10 Specialist glass businesses (90% or more of crop output from glasshouse production)**

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	<b>2020/21</b>	<b>2021/22</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2020/21</b>	<b>2021/22</b>
Number of businesses	24	15	24	15	24	15
Productive cropping area (ha)	1.03	0.96	1.03	0.96		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>663,656</b>	<b>629,419</b>	<b>641,219</b>	<b>655,438</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	95,151	80,214	91,934	83,530	14.3	12.7
Fertilisers & composts	23,589	14,858	22,792	15,472	3.6	2.4
Crop protection	5,621	3,622	5,431	3,772	0.8	0.6
Market charges	30,266	24,678	29,243	25,698	4.6	3.9
Packing materials	27,334	27,065	26,410	28,184	4.1	4.3
Horticultural sundries	30,171	25,268	29,150	26,312	4.5	4.0
Glasshouse fuel	36,798	67,111	35,554	69,885	5.5	10.7
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>248,930</b>	<b>242,817</b>	<b>240,514</b>	<b>252,854</b>	<b>37.5</b>	<b>38.6</b>
<b>Total gross margin</b>	<b>414,726</b>	<b>386,603</b>	<b>400,705</b>	<b>402,584</b>	<b>62.5</b>	<b>61.4</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	139,061	130,662	134,360	136,064	21.0	20.8
Regular unpaid	35,273	34,834	34,080	36,273	5.3	5.5
Casual labour	62,481	60,686	60,368	63,195	9.4	9.6
Power & machinery costs:						
Contract & hire	4,531	6,254	4,378	6,513	0.7	1.0
Fuel & electricity	18,004	26,109	17,395	27,188	2.7	4.1
Repairs	12,185	15,061	11,773	15,683	1.8	2.4
Machinery depreciation	16,990	16,464	16,415	17,145	2.6	2.6
Glasshouse depreciation	23,896	22,488	23,088	23,418	3.6	3.6
Rent (incl. imputed)	12,083	8,459	11,674	8,809	1.8	1.3
Other costs:						
Occupier's repairs	17,442	19,020	16,852	19,806	2.6	3.0
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	2,786	2,067	2,691	2,152	0.4	0.3
Sundries	23,226	22,020	22,441	22,930	3.5	3.5
<b>Total fixed costs</b>	<b>367,957</b>	<b>364,124</b>	<b>355,516</b>	<b>379,176</b>	<b>55.4</b>	<b>57.9</b>
<b>Management &amp; investment income</b>	<b>46,769</b>	<b>22,479</b>	<b>45,188</b>	<b>23,409</b>	<b>7.0</b>	<b>3.6</b>
Minus: management salaries	773	0	747	0	0.1	0.0
Plus: farmer & spouse labour	31,683	30,828	30,612	32,102	4.8	4.9
<b>Net farm income</b>	<b>77,679</b>	<b>53,307</b>	<b>75,053</b>	<b>55,511</b>	<b>11.7</b>	<b>8.5</b>
<b>Farm business income</b>	<b>67,926</b>	<b>48,227</b>	<b>65,630</b>	<b>50,221</b>	<b>10.2</b>	<b>7.7</b>

Premium businesses	Per hectare 2021/22^	Per £100 of gross output 2021/22^	Crop output per cent of total crop output (%)		
			Average 2020/21	Average 2021/22	Premium 2021/22^
Number of businesses	5	5			
Productive cropping area (ha)	1.70				
	£ per hectare	average %			
Gross output	1,052,273	100.0			
Variable costs					
Seed & young plants	120,472	11.4			
Fertilisers & composts	19,556	1.9			
Crop protection	5,080	0.5			
Market charges	32,472	3.1			
Packing materials	42,705	4.1			
Horticultural sundries	25,774	2.4			
Glasshouse fuel	144,884	13.8			
Other variable costs	0	0.0			
Total variable costs	390,943	37.2			
Total gross margin	661,330	62.8			
Fixed costs					
Labour:					
Regular paid	139,729	13.3			
Regular unpaid	23,499	2.2			
Casual labour	108,168	10.3			
Power & machinery costs:					
Contract & hire	10,875	1.0			
Fuel & electricity	35,543	3.4			
Repairs	31,496	3.0			
Machinery depreciation	31,152	3.0			
Glasshouse depreciation	48,607	4.6			
Rent (incl. imputed)	6,885	0.7			
Other costs:					
Occupier's repairs	27,650	2.6			
Permanent crop depreciation	0	0.0			
Water	1,789	0.2			
Sundries	18,558	1.8			
Total fixed costs	483,951	46.0			
Management & investment income	177,379	16.9			
Minus: management salaries	0	0.0			
Plus: farmer & spouse labour	18,754	1.8			
Net farm income	196,133	18.6			
Farm business income	187,858	17.9			

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

**Table 2.11 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>	
	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>
Number of businesses	10	7	10	7	10	7
Productive cropping area (ha)	1.15	0.95	1.15	0.95		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>519,406</b>	<b>471,742</b>	<b>453,008</b>	<b>495,655</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	35,567	21,528	31,020	22,619	6.8	4.6
Fertilisers & composts	15,974	16,397	13,932	17,228	3.1	3.5
Crop protection	3,999	2,357	3,488	2,476	0.8	0.5
Market charges	20,298	24,270	17,703	25,500	3.9	5.1
Packing materials	9,596	6,770	8,369	7,113	1.8	1.4
Horticultural sundries	26,871	13,729	23,436	14,425	5.2	2.9
Glasshouse fuel	59,629	102,942	52,006	108,160	11.5	21.8
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>171,934</b>	<b>187,991</b>	<b>149,955</b>	<b>197,521</b>	<b>33.1</b>	<b>39.9</b>
<b>Total gross margin</b>	<b>347,472</b>	<b>283,751</b>	<b>303,053</b>	<b>298,134</b>	<b>66.9</b>	<b>60.1</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	122,322	84,036	106,685	88,296	23.6	17.8
Regular unpaid	30,794	25,066	26,857	26,337	5.9	5.3
Casual labour	37,889	24,292	33,045	25,523	7.3	5.1
Power & machinery costs:						
Contract & hire	4,197	6,107	3,661	6,417	0.8	1.3
Fuel & electricity	13,865	11,878	12,093	12,480	2.7	2.5
Repairs	14,388	10,666	12,549	11,207	2.8	2.3
Machinery depreciation	16,188	17,270	14,118	18,145	3.1	3.7
Glasshouse depreciation	41,083	31,715	35,831	33,323	7.9	6.7
Rent (incl. imputed)	10,748	7,170	9,374	7,534	2.1	1.5
Other costs:						
Occupier's repairs	12,573	15,576	10,966	16,365	2.4	3.3
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	3,461	2,628	3,019	2,762	0.7	0.6
Sundries	19,352	10,402	16,878	10,929	3.7	2.2
<b>Total fixed costs</b>	<b>326,860</b>	<b>246,807</b>	<b>285,076</b>	<b>259,317</b>	<b>62.9</b>	<b>52.3</b>
<b>Management &amp; investment income</b>	<b>20,612</b>	<b>36,944</b>	<b>17,977</b>	<b>38,817</b>	<b>4.0</b>	<b>7.8</b>
Minus: management salaries	0	0	0	0	0.0	0.0
Plus: farmer & spouse labour	27,817	23,565	24,261	24,760	5.4	5.0
<b>Net farm income</b>	<b>48,429</b>	<b>60,510</b>	<b>42,238</b>	<b>63,577</b>	<b>9.3</b>	<b>12.8</b>
<b>Farm business income</b>	<b>34,487</b>	<b>54,233</b>	<b>30,078</b>	<b>56,982</b>	<b>6.6</b>	<b>11.5</b>

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

### **Crop output per cent of total crop output (%)**

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	Average 2020/21^	Average 2021/22^
Glasshouse crops		
Flowers & nursery stock	0.0	0.0
Tomatoes	46.7	73.1
Lettuce	1.1	1.5
Soft fruit	17.1	17.7
Other glasshouse crops	35.1	7.7
Outdoor crops		
Flowers & nursery stock	0.0	0.0
Vegetables	0.0	0.0
Fruit	0.0	0.0
Other outdoor crops	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

### **Distribution of tenant's type capital (%)**

---

	Average 2020/21^	Average 2021/22^
Crops & tillages	0	0
Stores	2	2
Glasshouses	42	55
Equipment	15	24
Livestock	0	0
Other	41	20
<b>Total</b>	<b>100</b>	<b>100</b>

<b>Tenant's capital (£)</b>	<b>1,427,516</b>	<b>1,009,285</b>
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*\* no premium figures, sample too small*

**Table 2.12 Specialist glass businesses (90% or more of crop output from glasshouse production) - mainly ornamental crops\***

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21^	2021/22^	2020/21^	2021/22^	2020/21^	2021/22^
Number of businesses	14	8	14	8	14	8
Productive cropping area (ha)	0.95	0.97	0.95	0.97		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>779,137</b>	<b>872,650</b>	<b>823,902</b>	<b>896,415</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	142,851	170,742	151,058	175,392	18.3	19.6
Fertilisers & composts	29,686	12,485	31,392	12,825	3.8	1.4
Crop protection	6,919	5,575	7,317	5,727	0.9	0.6
Market charges	38,245	25,308	40,443	25,997	4.9	2.9
Packing materials	41,535	58,373	43,921	59,962	5.3	6.7
Horticultural sundries	32,812	43,067	34,697	44,240	4.2	4.9
Glasshouse fuel	18,521	11,839	19,586	12,162	2.4	1.4
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>310,570</b>	<b>327,389</b>	<b>328,414</b>	<b>336,305</b>	<b>39.9</b>	<b>37.5</b>
<b>Total gross margin</b>	<b>468,567</b>	<b>545,261</b>	<b>495,488</b>	<b>560,110</b>	<b>60.1</b>	<b>62.5</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	152,462	202,587	161,222	208,104	19.6	23.2
Regular unpaid	38,858	49,900	41,091	51,259	5.0	5.7
Casual labour	82,168	116,828	86,889	120,010	10.5	13.4
Power & machinery costs:						
Contract & hire	4,799	6,481	5,074	6,658	0.6	0.7
Fuel & electricity	21,318	48,060	22,542	49,369	2.7	5.5
Repairs	10,421	21,840	11,020	22,434	1.3	2.5
Machinery depreciation	17,632	15,222	18,645	15,636	2.3	1.7
Glasshouse depreciation	10,136	8,255	10,719	8,480	1.3	0.9
Rent (incl. imputed)	13,151	10,447	13,907	10,731	1.7	1.2
Other costs:						
Occupier's repairs	21,340	24,332	22,566	24,995	2.7	2.8
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	2,244	1,201	2,373	1,234	0.3	0.1
Sundries	26,328	39,942	27,841	41,029	3.4	4.6
<b>Total fixed costs</b>	<b>400,857</b>	<b>545,095</b>	<b>423,888</b>	<b>559,939</b>	<b>51.4</b>	<b>62.5</b>
<b>Management &amp; investment income</b>	<b>67,710</b>	<b>166</b>	<b>71,600</b>	<b>170</b>	<b>8.7</b>	<b>0.0</b>
Minus: management salaries	1,392	0	1,472	0	0.2	0.0
Plus: farmer & spouse labour	34,778	42,031	36,777	43,175	4.5	4.8
<b>Net farm income</b>	<b>101,096</b>	<b>42,196</b>	<b>106,905</b>	<b>43,345</b>	<b>13.0</b>	<b>4.8</b>
<b>Farm business income</b>	<b>94,697</b>	<b>38,963</b>	<b>100,138</b>	<b>40,024</b>	<b>12.2</b>	<b>4.5</b>

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



### Crop output per cent of total crop output (%)

	Average 2020/21^	Average 2021/22^
Glasshouse crops		
Flowers & nursery stock	97.5	100.0
Tomatoes	0.0	0.0
Lettuce	0.0	0.0
Soft fruit	0.0	0.0
Other glasshouse crops	2.5	0.0
Outdoor crops		
Flowers & nursery stock	0.0	0.0
Vegetables	0.0	0.0
Fruit	0.0	0.0
Other outdoor crops	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

### Distribution of tenant's type capital (%)

	Average 2020/21^	Average 2021/22^
Crops & tillages	2	3
Stores	15	8
Glasshouses	19	16
Equipment	22	21
Livestock	0	0
Other	43	53
<b>Total</b>	<b>100</b>	<b>100</b>
 <b>Tenant's capital (£)</b>	 <b>990,361</b>	 <b>921,057</b>

*\* no premium figures, sample too small*

**Table 2.13 All specialist fruit businesses**

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21	2021/22	2020/21	2021/22	2020/21	2021/22
Number of businesses	46	40	46	40	46	40
Productive cropping area (ha)	18.69	18.92	18.69	18.92		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>315,059</b>	<b>379,710</b>	<b>16,860</b>	<b>20,067</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	7,739	8,835	414	467	2.5	2.3
Fertilisers & composts	4,308	4,607	231	243	1.4	1.2
Crop protection	12,922	16,340	691	864	4.1	4.3
Market charges	35,221	39,687	1,885	2,097	11.2	10.5
Packing materials	25,932	31,418	1,388	1,660	8.2	8.3
Horticultural sundries	9,091	9,680	486	512	2.9	2.5
Glasshouse fuel	29	51	2	3	0.0	0.0
Other variable costs	1,044	1,938	56	102	0.3	0.5
<b>Total variable costs</b>	<b>96,287</b>	<b>112,556</b>	<b>5,153</b>	<b>5,948</b>	<b>30.6</b>	<b>29.6</b>
<b>Total gross margin</b>	<b>218,771</b>	<b>267,154</b>	<b>11,707</b>	<b>14,118</b>	<b>69.4</b>	<b>70.4</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	29,128	40,445	1,559	2,137	9.2	10.7
Regular unpaid	26,290	28,392	1,407	1,500	8.3	7.5
Casual labour	69,698	77,139	3,730	4,077	22.1	20.3
Power & machinery costs:						
Contract & hire	8,114	11,494	434	607	2.6	3.0
Fuel & electricity	11,209	15,147	600	800	3.6	4.0
Repairs	6,487	9,486	347	501	2.1	2.5
Machinery depreciation	10,689	11,335	572	599	3.4	3.0
Glasshouse depreciation	142	195	8	10	0.0	0.1
Rent (incl. imputed)	21,166	26,101	1,133	1,379	6.7	6.9
Other costs:						
Occupier's repairs	5,737	11,554	307	611	1.8	3.0
Permanent crop depreciation	5,160	8,213	276	434	1.6	2.2
Water	1,795	1,250	96	66	0.6	0.3
Sundries	14,248	18,004	762	951	4.5	4.7
<b>Total fixed costs</b>	<b>209,863</b>	<b>258,756</b>	<b>11,230</b>	<b>13,675</b>	<b>66.6</b>	<b>68.1</b>
<b>Management &amp; investment income</b>	<b>8,908</b>	<b>8,398</b>	<b>477</b>	<b>444</b>	<b>2.8</b>	<b>2.2</b>
Minus: management salaries	316	188	17	10	0.1	0.0
Plus: farmer & spouse labour	20,877	20,736	1,117	1,096	6.6	5.5
<b>Net farm income</b>	<b>29,469</b>	<b>28,946</b>	<b>1,577</b>	<b>1,530</b>	<b>9.4</b>	<b>7.6</b>
<b>Farm business income</b>	<b>35,752</b>	<b>33,410</b>	<b>1,913</b>	<b>1,766</b>	<b>11.3</b>	<b>8.8</b>

[illegible]

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

**Table 2.14 Specialist fruit businesses, mainly top fruit**

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21	2021/22	2020/21	2021/22	2020/21	2021/22
Number of businesses	28	26	28	26	28	26
Productive cropping area (ha)	17.00	17.33	17.00	17.33		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>246,956</b>	<b>241,899</b>	<b>14,530</b>	<b>13,961</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	1,194	3,071	70	177	0.5	1.3
Fertilisers & composts	2,464	3,410	145	197	1.0	1.4
Crop protection	17,107	17,975	1,007	1,037	6.9	7.4
Market charges	38,342	39,122	2,256	2,258	15.5	16.2
Packing materials	17,376	14,504	1,022	837	7.0	6.0
Horticultural sundries	10,458	9,772	615	564	4.2	4.0
Glasshouse fuel	0	0	0	0	0.0	0.0
Other variable costs	2,661	3,093	157	179	1.1	1.3
<b>Total variable costs</b>	<b>89,601</b>	<b>90,947</b>	<b>5,272</b>	<b>5,249</b>	<b>36.3</b>	<b>37.6</b>
<b>Total gross margin</b>	<b>157,355</b>	<b>150,953</b>	<b>9,258</b>	<b>8,712</b>	<b>63.7</b>	<b>62.4</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	22,296	21,755	1,312	1,256	9.0	9.0
Regular unpaid	21,307	24,832	1,254	1,433	8.6	10.3
Casual labour	32,478	44,618	1,911	2,575	13.2	18.4
Power & machinery costs:						
Contract & hire	13,955	13,789	821	796	5.7	5.7
Fuel & electricity	10,525	11,816	619	682	4.3	4.9
Repairs	9,619	9,813	566	566	3.9	4.1
Machinery depreciation	11,522	9,283	678	536	4.7	3.8
Glasshouse depreciation	92	128	5	7	0.0	0.1
Rent (incl. imputed)	16,035	15,040	943	868	6.5	6.2
Other costs:						
Occupier's repairs	4,967	4,975	292	287	2.0	2.1
Permanent crop depreciation	9,154	10,273	539	593	3.7	4.2
Water	776	1,148	46	66	0.3	0.5
Sundries	13,121	12,649	772	730	5.3	5.2
<b>Total fixed costs</b>	<b>165,847</b>	<b>180,120</b>	<b>9,758</b>	<b>10,396</b>	<b>67.2</b>	<b>74.5</b>
<b>Management &amp; investment income</b>	<b>-8,493</b>	<b>-29,167</b>	<b>-500</b>	<b>-1,683</b>	<b>-3.4</b>	<b>-12.1</b>
Minus: management salaries	364	136	21	8	0.1	0.1
Plus: farmer & spouse labour	18,438	21,363	1,085	1,233	7.5	8.8
<b>Net farm income</b>	<b>9,581</b>	<b>-7,940</b>	<b>564</b>	<b>-458</b>	<b>3.9</b>	<b>-3.3</b>
<b>Farm business income</b>	<b>12,727</b>	<b>-4,135</b>	<b>749</b>	<b>-239</b>	<b>5.2</b>	<b>-1.7</b>

Premium businesses	Per hectare 2021/22^	Per £100 of gross output 2021/22^
Number of businesses	12	12
Productive cropping area (ha)	33.36	
	£ per hectare	average %
Gross output	14,416	100.0
Variable costs		
Seed & young plants	169	1.2
Fertilisers & composts	198	1.4
Crop protection	833	5.8
Market charges	2,673	18.5
Packing materials	963	6.7
Horticultural sundries	248	1.7
Glasshouse fuel	0	0.0
Other variable costs	132	0.9
Total variable costs	5,216	36.2
Total gross margin	9,200	63.8
Fixed costs		
Labour:		
Regular paid	1,430	9.9
Regular unpaid	818	5.7
Casual labour	2,972	20.6
Power & machinery costs:		
Contract & hire	350	2.4
Fuel & electricity	375	2.6
Repairs	395	2.7
Machinery depreciation	329	2.3
Glasshouse depreciation	2	0.0
Rent (incl. imputed)	581	4.0
Other costs:		
Occupier's repairs	322	2.2
Permanent crop depreciation	399	2.8
Water	63	0.4
Sundries	646	4.5
Total fixed costs	8,682	60.2
Management & investment income	519	3.6
Minus: management salaries	17	0.1
Plus: farmer & spouse labour	548	3.8
Net farm income	1,049	7.3
Farm business income	1,512	10.5

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

**Table 2.15 Specialist fruit businesses, mainly top fruit-excluding cider**

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21	2021/22	2020/21	2021/22	2020/21	2021/22
Number of businesses	21	19	21	19	21	19
Productive cropping area (ha)	14.13	14.37	14.13	14.37		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>256,579</b>	<b>250,185</b>	<b>18,154</b>	<b>17,413</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	1,260	3,452	89	240	0.5	1.4
Fertilisers & composts	2,177	3,100	154	216	0.8	1.2
Crop protection	17,709	19,122	1,253	1,331	6.9	7.6
Market charges	42,662	44,520	3,018	3,099	16.6	17.8
Packing materials	19,304	16,710	1,366	1,163	7.5	6.7
Horticultural sundries	11,255	10,857	796	756	4.4	4.3
Glasshouse fuel	0	0	0	0	0.0	0.0
Other variable costs	1,705	1,942	121	135	0.7	0.8
<b>Total variable costs</b>	<b>96,072</b>	<b>99,704</b>	<b>6,797</b>	<b>6,940</b>	<b>37.4</b>	<b>39.9</b>
<b>Total gross margin</b>	<b>160,507</b>	<b>150,481</b>	<b>11,356</b>	<b>10,474</b>	<b>62.6</b>	<b>60.1</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	22,118	21,916	1,565	1,525	8.6	8.8
Regular unpaid	20,483	24,529	1,449	1,707	8.0	9.8
Casual labour	35,233	50,415	2,493	3,509	13.7	20.2
Power & machinery costs:						
Contract & hire	14,139	14,408	1,000	1,003	5.5	5.8
Fuel & electricity	11,089	12,613	785	878	4.3	5.0
Repairs	9,689	9,913	686	690	3.8	4.0
Machinery depreciation	11,442	9,402	810	654	4.5	3.8
Glasshouse depreciation	103	148	7	10	0.0	0.1
Rent (incl. imputed)	15,833	14,773	1,120	1,028	6.2	5.9
Other costs:						
Occupier's repairs	5,161	5,387	365	375	2.0	2.2
Permanent crop depreciation	9,275	10,715	656	746	3.6	4.3
Water	779	1,153	55	80	0.3	0.5
Sundries	13,237	12,568	937	875	5.2	5.0
<b>Total fixed costs</b>	<b>168,583</b>	<b>187,939</b>	<b>11,928</b>	<b>13,081</b>	<b>65.7</b>	<b>75.1</b>
<b>Management &amp; investment income</b>	<b>-8,076</b>	<b>-37,458</b>	<b>-571</b>	<b>-2,607</b>	<b>-3.1</b>	<b>-15.0</b>
Minus: management salaries	389	134	27	9	0.2	0.1
Plus: farmer & spouse labour	18,560	22,353	1,313	1,556	7.2	8.9
<b>Net farm income</b>	<b>10,096</b>	<b>-15,240</b>	<b>714</b>	<b>-1,061</b>	<b>3.9</b>	<b>-6.1</b>
<b>Farm business income</b>	<b>11,340</b>	<b>-14,103</b>	<b>802</b>	<b>-982</b>	<b>4.4</b>	<b>-5.6</b>

[illegible]

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

**Table 2.16 Specialist fruit businesses, cider\***

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>
Number of businesses	7	7	7	7	7	7
Productive cropping area (ha)	41.51	36.58	41.51	36.58		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>164,523</b>	<b>188,005</b>	<b>3,963</b>	<b>5,140</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	627	592	15	16	0.4	0.3
Fertilisers & composts	4,915	5,426	118	148	3.0	2.9
Crop protection	11,948	10,511	288	287	7.3	5.6
Market charges	1,337	4,012	32	110	0.8	2.1
Packing materials	855	155	21	4	0.5	0.1
Horticultural sundries	3,633	2,712	88	74	2.2	1.4
Glasshouse fuel	0	0	0	0	0.0	0.0
Other variable costs	10,853	10,577	261	289	6.6	5.6
<b>Total variable costs</b>	<b>34,168</b>	<b>33,985</b>	<b>823</b>	<b>929</b>	<b>20.8</b>	<b>18.1</b>
<b>Total gross margin</b>	<b>130,354</b>	<b>154,020</b>	<b>3,140</b>	<b>4,211</b>	<b>79.2</b>	<b>81.9</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	23,824	20,705	574	566	14.5	11.0
Regular unpaid	28,361	26,802	683	733	17.2	14.3
Casual labour	8,879	6,913	214	189	5.4	3.7
Power & machinery costs:						
Contract & hire	12,379	9,762	298	267	7.5	5.2
Fuel & electricity	5,694	6,634	137	181	3.5	3.5
Repairs	9,017	9,162	217	251	5.5	4.9
Machinery depreciation	12,205	8,509	294	233	7.4	4.5
Glasshouse depreciation	0	0	0	0	0.0	0.0
Rent (incl. imputed)	17,767	16,777	428	459	10.8	8.9
Other costs:						
Occupier's repairs	3,299	2,293	79	63	2.0	1.2
Permanent crop depreciation	8,119	7,402	196	202	4.9	3.9
Water	751	1,118	18	31	0.5	0.6
Sundries	12,121	13,182	292	360	7.4	7.0
<b>Total fixed costs</b>	<b>142,418</b>	<b>129,260</b>	<b>3,431</b>	<b>3,534</b>	<b>86.6</b>	<b>68.8</b>
<b>Management &amp; investment income</b>	<b>-12,064</b>	<b>24,760</b>	<b>-291</b>	<b>677</b>	<b>-7.3</b>	<b>13.2</b>
Minus: management salaries	157	144	4	4	0.1	0.1
Plus: farmer & spouse labour	17,396	14,924	419	408	10.6	7.9
<b>Net farm income</b>	<b>5,176</b>	<b>39,540</b>	<b>125</b>	<b>1,081</b>	<b>3.1</b>	<b>21.0</b>
<b>Farm business income</b>	<b>24,606</b>	<b>60,698</b>	<b>593</b>	<b>1,660</b>	<b>15.0</b>	<b>32.3</b>

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures



**Crop output per cent of total crop output (%)**

	Average 2020/21^	Average 2021/22^
Top fruit		
Dessert apples	4.1	3.1
Culinary apples	0.0	0.0
Cider apples	94.9	96.4
Plums	0.0	0.0
Other top fruit	0.1	0.0
Soft fruit		
Strawberries	0.0	0.0
Raspberries	0.0	0.0
Blackcurrants	0.0	0.0
Other soft fruit	0.0	0.0
Other crops	0.9	0.5
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

**Distribution of tenant's type capital (%)**

	Average 2020/21^	Average 2021/22^
Crops & tillages	3	3
Stores	7	7
Glasshouses	0	0
Equipment	26	26
Livestock	9	10
Other	55	54
<b>Total</b>	<b>100</b>	<b>100</b>
 <b>Tenant's capital (£)</b>	 <b>578,047</b>	 <b>518,595</b>

*\* no premium figures, sample too small*

**Table 2.17 All specialist hardy nursery stock businesses**

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	<b>2020/21</b>	<b>2021/22</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2020/21</b>	<b>2021/22</b>
Number of businesses	22	20	22	20	22	20
Productive cropping area (ha)	2.10	1.77	2.10	1.77		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>532,764</b>	<b>552,810</b>	<b>253,733</b>	<b>312,070</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	153,900	146,429	73,296	82,661	28.9	26.5
Fertilisers & composts	16,664	16,083	7,936	9,079	3.1	2.9
Crop protection	2,819	3,130	1,343	1,767	0.5	0.6
Market charges	19,083	16,495	9,088	9,312	3.6	3.0
Packing materials	14,337	15,771	6,828	8,903	2.7	2.9
Horticultural sundries	19,470	33,075	9,273	18,671	3.7	6.0
Glasshouse fuel	904	866	430	489	0.2	0.2
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>227,177</b>	<b>231,848</b>	<b>108,195</b>	<b>130,882</b>	<b>42.6</b>	<b>41.9</b>
<b>Total gross margin</b>	<b>305,586</b>	<b>320,962</b>	<b>145,538</b>	<b>181,188</b>	<b>57.4</b>	<b>58.1</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	107,541	108,555	51,217	61,281	20.2	19.6
Regular unpaid	38,695	39,459	18,429	22,275	7.3	7.1
Casual labour	12,735	11,786	6,065	6,653	2.4	2.1
Power & machinery costs:						
Contract & hire	4,199	5,787	2,000	3,267	0.8	1.0
Fuel & electricity	9,968	8,692	4,748	4,907	1.9	1.6
Repairs	8,151	6,722	3,882	3,795	1.5	1.2
Machinery depreciation	11,494	9,435	5,474	5,326	2.2	1.7
Glasshouse depreciation	1,316	1,099	627	620	0.2	0.2
Rent (incl. imputed)	11,303	9,570	5,383	5,402	2.1	1.7
Other costs:						
Occupier's repairs	6,438	6,184	3,066	3,491	1.2	1.1
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	1,944	1,948	926	1,100	0.4	0.4
Sundries	26,009	27,920	12,387	15,761	4.9	5.1
<b>Total fixed costs</b>	<b>239,794</b>	<b>237,156</b>	<b>114,204</b>	<b>133,878</b>	<b>45.0</b>	<b>42.9</b>
<b>Management &amp; investment income</b>	<b>65,792</b>	<b>83,806</b>	<b>31,334</b>	<b>47,310</b>	<b>12.3</b>	<b>15.2</b>
Minus: management salaries	135	54	64	31	0.0	0.0
Plus: farmer & spouse labour	28,542	32,375	13,593	18,276	5.4	5.9
<b>Net farm income</b>	<b>94,199</b>	<b>116,127</b>	<b>44,863</b>	<b>65,555</b>	<b>17.7</b>	<b>21.0</b>
<b>Farm business income</b>	<b>89,474</b>	<b>118,263</b>	<b>42,613</b>	<b>66,761</b>	<b>16.8</b>	<b>21.4</b>

Premium businesses	Per hectare	Per £100 of gross output	Crop output per cent of total crop output (%)			
	2021/22^	2021/22^	Average 2020/21	Average 2021/22	Premium 2021/22^	
Number of businesses	8	8				
Productive cropping area (ha)	3.05		Hardy nursery stock			
			Glasshouse crops	25.0	19.3	29.3
	£ per hectare	average %	Outdoor crops	75.0	80.7	70.7
Gross output	342,987	100.0	Other crops	0.0	0.0	0.0
Variable costs			Total	100.0	100.0	100.0
Seed & young plants	73,346	21.4				
Fertilisers & composts	7,257	2.1				
Crop protection	2,297	0.7				
Market charges	12,189	3.6				
Packing materials	4,294	1.3				
Horticultural sundries	9,105	2.7				
Glasshouse fuel	939	0.3				
Other variable costs	0	0.0				
Total variable costs	109,428	31.9	Distribution of tenant's type capital (%)			
Total gross margin	233,558	68.1		Average 2020/21	Average 2021/22	Premium 2021/22^
Fixed costs						
Labour:			Crops & tillages	33	24	21
Regular paid	64,485	18.8	Stores	9	7	3
Regular unpaid	12,420	3.6	Glasshouses	3	3	2
Casual labour	4,178	1.2	Equipment	19	16	17
			Livestock	0	0	0
Power & machinery costs:			Other	35	50	57
Contract & hire	6,307	1.8				
Fuel & electricity	6,112	1.8	Total	100	100	100
Repairs	5,452	1.6				
Machinery depreciation	8,881	2.6				
Glasshouse depreciation	663	0.2	Tenant's capital (£)	693,087	682,263	1,674,798
Rent (incl. imputed)	5,446	1.6				
Other costs:						
Occupier's repairs	3,190	0.9				
Permanent crop depreciation	0	0.0				
Water	568	0.2				
Sundries	15,117	4.4				
Total fixed costs	132,819	38.7				
Management & investment income	100,739	29.4				
Minus: management salaries	0	0.0				
Plus: farmer & spouse labour	9,977	2.9				
Net farm income	110,716	32.3				
Farm business income	109,348	31.9				

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

**Table 2.18 Intensive hardy nursery stock - crop output more than £175,000 per hectare**

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>
Number of businesses	13	14	13	14	13	14
Productive cropping area (ha)	1.69	1.25	1.69	1.25		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>731,682</b>	<b>659,738</b>	<b>432,306</b>	<b>527,927</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	241,944	183,934	142,950	147,185	33.1	27.9
Fertilisers & composts	24,944	19,874	14,738	15,904	3.4	3.0
Crop protection	3,340	3,550	1,973	2,841	0.5	0.5
Market charges	32,471	21,237	19,185	16,994	4.4	3.2
Packing materials	21,292	20,379	12,580	16,307	2.9	3.1
Horticultural sundries	32,021	42,247	18,919	33,806	4.4	6.4
Glasshouse fuel	1,511	1,077	893	862	0.2	0.2
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>357,522</b>	<b>292,298</b>	<b>211,238</b>	<b>233,899</b>	<b>48.9</b>	<b>44.3</b>
<b>Total gross margin</b>	<b>374,160</b>	<b>367,440</b>	<b>221,068</b>	<b>294,028</b>	<b>51.1</b>	<b>55.7</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	143,713	138,514	84,911	110,840	19.6	21.0
Regular unpaid	42,442	38,431	25,077	30,753	5.8	5.8
Casual labour	13,485	5,914	7,967	4,732	1.8	0.9
Power & machinery costs:						
Contract & hire	6,481	7,671	3,829	6,138	0.9	1.2
Fuel & electricity	10,872	9,308	6,423	7,449	1.5	1.4
Repairs	10,162	7,047	6,004	5,639	1.4	1.1
Machinery depreciation	13,821	10,748	8,166	8,601	1.9	1.6
Glasshouse depreciation	1,943	1,403	1,148	1,122	0.3	0.2
Rent (incl. imputed)	10,245	9,260	6,053	7,410	1.4	1.4
Other costs:						
Occupier's repairs	8,753	7,681	5,172	6,147	1.2	1.2
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	2,564	2,492	1,515	1,994	0.4	0.4
Sundries	32,574	31,528	19,246	25,229	4.5	4.8
<b>Total fixed costs</b>	<b>297,055</b>	<b>269,996</b>	<b>175,511</b>	<b>216,053</b>	<b>40.6</b>	<b>40.9</b>
<b>Management &amp; investment income</b>	<b>77,105</b>	<b>97,444</b>	<b>45,557</b>	<b>77,976</b>	<b>10.5</b>	<b>14.8</b>
Minus: management salaries	243	73	144	59	0.0	0.0
Plus: farmer & spouse labour	26,973	28,853	15,937	23,088	3.7	4.4
<b>Net farm income</b>	<b>103,835</b>	<b>126,224</b>	<b>61,350</b>	<b>101,005</b>	<b>14.2</b>	<b>19.1</b>
<b>Farm business income</b>	<b>109,760</b>	<b>129,241</b>	<b>64,850</b>	<b>103,419</b>	<b>15.0</b>	<b>19.6</b>

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

Premium businesses	Per hectare	Per £100 of gross output	Crop output per cent of total crop output (%)			
	2021/22^	2021/22^		Average 2020/21^	Average 2021/22^	Premium 2021/22^
Number of businesses	5	5				
Productive cropping area (ha)	2.85		Hardy nursery stock			
			Glasshouse crops	28.4	20.4	30.5
	£ per hectare	average %	Outdoor crops	71.6	79.6	69.5
Gross output	614,017	100.0	Other crops	0.0	0.0	0.0
Variable costs			Total	100.0	100.0	100.0
Seed & young plants	146,814	23.9				
Fertilisers & composts	13,244	2.2				
Crop protection	4,069	0.7				
Market charges	19,604	3.2				
Packing materials	7,032	1.1				
Horticultural sundries	18,133	3.0				
Glasshouse fuel	1,930	0.3				
Other variable costs	0	0.0				
Total variable costs	210,825	34.3	Distribution of tenant's type capital (%)			
Total gross margin	403,192	65.7		Average 2020/21^	Average 2021/22^	Premium 2021/22^
Fixed costs						
Labour:			Crops & tillages	38	25	24
Regular paid	122,247	19.9	Stores	8	7	1
Regular unpaid	17,241	2.8	Glasshouses	4	3	2
Casual labour	2,702	0.4	Equipment	17	16	17
			Livestock	0	0	0
Power & machinery costs:			Other	34	48	55
Contract & hire	13,421	2.2	Total	100	100	100
Fuel & electricity	10,805	1.8				
Repairs	9,941	1.6				
Machinery depreciation	16,574	2.7				
Glasshouse depreciation	1,222	0.2	Tenant's capital (£)	922,362	752,916	2,665,964
Rent (incl. imputed)	8,071	1.3				
Other costs:						
Occupier's repairs	5,712	0.9				
Permanent crop depreciation	0	0.0				
Water	817	0.1				
Sundries	25,745	4.2				
Total fixed costs	234,498	38.2				
Management & investment income	168,694	27.5				
Minus: management salaries	0	0.0				
Plus: farmer & spouse labour	11,941	1.9				
Net farm income	180,635	29.4				
Farm business income	179,276	29.2				

**Table 2.19 Extensive hardy nursery stock - crop output less than £175,000 per hectare\***

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>
Number of businesses	8	6	8	6	8	6
Productive cropping area (ha)	2.64	3.25	2.64	3.25		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>249,503</b>	<b>249,080</b>	<b>94,372</b>	<b>76,558</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	47,923	39,894	18,126	12,262	19.2	16.0
Fertilisers & composts	7,198	5,313	2,723	1,633	2.9	2.1
Crop protection	2,321	1,938	878	596	0.9	0.8
Market charges	2,621	3,026	991	930	1.1	1.2
Packing materials	6,504	2,684	2,460	825	2.6	1.1
Horticultural sundries	4,261	7,021	1,612	2,158	1.7	2.8
Glasshouse fuel	163	264	62	81	0.1	0.1
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>70,991</b>	<b>60,139</b>	<b>26,851</b>	<b>18,485</b>	<b>28.5</b>	<b>24.1</b>
<b>Total gross margin</b>	<b>178,513</b>	<b>188,941</b>	<b>67,521</b>	<b>58,073</b>	<b>71.5</b>	<b>75.9</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	38,860	23,459	14,698	7,210	15.6	9.4
Regular unpaid	32,057	42,378	12,125	13,025	12.8	17.0
Casual labour	13,838	28,466	5,234	8,749	5.5	11.4
Power & machinery costs:						
Contract & hire	1,085	435	410	134	0.4	0.2
Fuel & electricity	5,594	6,942	2,116	2,134	2.2	2.8
Repairs	5,082	5,801	1,922	1,783	2.0	2.3
Machinery depreciation	4,708	5,706	1,781	1,754	1.9	2.3
Glasshouse depreciation	617	235	233	72	0.2	0.1
Rent (incl. imputed)	9,363	10,450	3,541	3,212	3.8	4.2
Other costs:						
Occupier's repairs	3,118	1,929	1,179	593	1.2	0.8
Permanent crop depreciation	0	0	0	0	0.0	0.0
Water	1,366	402	517	123	0.5	0.2
Sundries	14,438	17,670	5,461	5,431	5.8	7.1
<b>Total fixed costs</b>	<b>130,126</b>	<b>143,873</b>	<b>49,219</b>	<b>44,221</b>	<b>52.2</b>	<b>57.8</b>
<b>Management &amp; investment income</b>	<b>48,387</b>	<b>45,068</b>	<b>18,302</b>	<b>13,852</b>	<b>19.4</b>	<b>18.1</b>
Minus: management salaries	0	0	0	0	0.0	0.0
Plus: farmer & spouse labour	32,057	42,378	12,125	13,025	12.8	17.0
<b>Net farm income</b>	<b>80,443</b>	<b>87,446</b>	<b>30,427</b>	<b>26,878</b>	<b>32.2</b>	<b>35.1</b>
<b>Farm business income</b>	<b>78,162</b>	<b>87,080</b>	<b>29,564</b>	<b>26,765</b>	<b>31.3</b>	<b>35.0</b>

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

**Crop output per cent of total crop output (%)**

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	Average 2020/21 ^	Average 2021/22 ^
Hardy nursery stock		
Glasshouse crops	9.6	10.5
Outdoor crops	90.4	89.5
Other crops	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

**Distribution of tenant's type capital (%)**

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	Average 2020/21 ^	Average 2021/22 ^
Crops & tillages	28	18
Stores	11	7
Glasshouses	3	1
Equipment	17	19
Livestock	0	0
Other	41	55
<b>Total</b>	<b>100</b>	<b>100</b>
 <b>Tenant's capital (£)</b>	 <b>331,598</b>	 <b>481,574</b>

*\* no premium figures, sample too small*

**Table 2.20 All other horticulture businesses**

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	<b>2020/21</b>	<b>2021/22</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2020/21</b>	<b>2021/22</b>
Number of businesses	40	39	40	39	40	39
Productive cropping area (ha)	21.63	24.91	21.63	24.91		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>270,314</b>	<b>322,251</b>	<b>12,496</b>	<b>12,934</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	22,398	29,781	1,035	1,195	8.3	9.2
Fertilisers & composts	7,946	10,392	367	417	2.9	3.2
Crop protection	7,464	10,026	345	402	2.8	3.1
Market charges	14,813	15,719	685	631	5.5	4.9
Packing materials	11,672	13,465	540	540	4.3	4.2
Horticultural sundries	8,360	12,196	386	490	3.1	3.8
Glasshouse fuel	563	396	26	16	0.2	0.1
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>73,216</b>	<b>91,974</b>	<b>3,385</b>	<b>3,692</b>	<b>27.1</b>	<b>28.5</b>
<b>Total gross margin</b>	<b>197,098</b>	<b>230,276</b>	<b>9,112</b>	<b>9,243</b>	<b>72.9</b>	<b>71.5</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	39,346	50,095	1,819	2,011	14.6	15.5
Regular unpaid	30,711	34,608	1,420	1,389	11.4	10.7
Casual labour	50,052	54,805	2,314	2,200	18.5	17.0
Power & machinery costs:						
Contract & hire	7,821	11,167	362	448	2.9	3.5
Fuel & electricity	10,814	13,607	500	546	4.0	4.2
Repairs	7,687	10,821	355	434	2.8	3.4
Machinery depreciation	11,825	9,123	547	366	4.4	2.8
Glasshouse depreciation	891	922	41	37	0.3	0.3
Rent (incl. imputed)	18,662	22,146	863	889	6.9	6.9
Other costs:						
Occupier's repairs	4,074	4,662	188	187	1.5	1.4
Permanent crop depreciation	2,147	3,250	99	130	0.8	1.0
Water	1,373	1,348	63	54	0.5	0.4
Sundries	14,242	16,586	658	666	5.3	5.1
<b>Total fixed costs</b>	<b>199,647</b>	<b>233,141</b>	<b>9,229</b>	<b>9,358</b>	<b>73.9</b>	<b>72.3</b>
<b>Management &amp; investment income</b>	<b>-2,550</b>	<b>-2,864</b>	<b>-118</b>	<b>-115</b>	<b>-0.9</b>	<b>-0.9</b>
Minus: management salaries	70	79	3	3	0.0	0.0
Plus: farmer & spouse labour	24,843	26,488	1,148	1,063	9.2	8.2
<b>Net farm income</b>	<b>22,223</b>	<b>23,544</b>	<b>1,027</b>	<b>945</b>	<b>8.2</b>	<b>7.3</b>
<b>Farm business income</b>	<b>27,536</b>	<b>33,350</b>	<b>1,273</b>	<b>1,339</b>	<b>10.2</b>	<b>10.3</b>



Premium businesses	Per	Per £100	Crop output per cent of total crop output (%)		
	hectare	of gross output	Average	Average	Premium
	2021/22^	2021/22^	2020/21	2021/22	2021/22^
Number of businesses	11	11			
Productive cropping area (ha)	10.27				
	<b>£ per hectare</b>	<b>average %</b>			
<b>Gross output</b>	<b>22,593</b>	<b>100.0</b>			
<b>Variable costs</b>					
Seed & young plants	1,489	6.6	Glasshouse crops	13.7	14.7
Fertilisers & composts	601	2.7	Outdoor vegetables:		3.6
Crop protection	404	1.8	Brassicas	5.9	3.9
			Legumes	0.3	0.6
Market charges	319	1.4	Salad crops	0.3	0.0
Packing materials	693	3.1	Other outdoor vegetables	4.5	3.1
Horticultural sundries	1,179	5.2			6.1
Glasshouse fuel	0	0.0	Flowers & nursery stock	12.1	13.7
Other variable costs	0	0.0	Soft fruit	41.7	39.4
			Top fruit	0.1	0.1
			Other crops	21.5	24.3
<b>Total variable costs</b>	<b>4,687</b>	<b>20.7</b>	<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Total gross margin</b>	<b>17,906</b>	<b>79.3</b>			
<b>Fixed costs</b>			Distribution of tenant's type capital (%)		
Labour:			Average	Average	Premium
Regular paid	1,578	7.0	2020/21	2021/22	2021/22^
Regular unpaid	2,446	10.8			
Casual labour	4,543	20.1			
Power & machinery costs:					
Contract & hire	371	1.6	Crops & tillages	14	17
Fuel & electricity	784	3.5	Stores	7	7
Repairs	767	3.4	Glasshouses	4	3
Machinery depreciation	600	2.7	Equipment	38	28
Glasshouse depreciation	7	0.0	Livestock	0	0
			Other	37	44
Rent (incl. imputed)	690	3.1	<b>Total</b>	<b>100</b>	<b>100</b>
Other costs:					
Occupier's repairs	307	1.4	<b>Tenant's capital (£)</b>	<b>369,815</b>	<b>500,716</b>
Permanent crop depreciation	163	0.7			<b>286,993</b>
Water	86	0.4			
Sundries	937	4.1			
<b>Total fixed costs</b>	<b>13,279</b>	<b>58.8</b>			
<b>Management &amp; investment income</b>	<b>4,627</b>	<b>20.5</b>			
Minus: management salaries	1	0.0			
Plus: farmer & spouse labour	2,323	10.3			
<b>Net farm income</b>	<b>6,949</b>	<b>30.8</b>			
<b>Farm business income</b>	<b>7,052</b>	<b>31.2</b>			

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

**Table 2.21 Other horticulture businesses, mainly outdoor vegetable crops\***

	<i>Per business</i>		<i>Per hectare</i>		<i>Per £100 of gross output</i>	
	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>	2020/21 <sup>^</sup>	2021/22 <sup>^</sup>
Number of businesses	12	12	12	12	12	12
Productive cropping area (ha)	8.29	8.65	8.29	8.65		
	<i>Average £/business</i>		<i>Average £/hectare</i>		<i>Average %</i>	
<b>Gross output</b>	<b>108,847</b>	<b>125,279</b>	<b>13,132</b>	<b>14,490</b>	<b>100.0</b>	<b>100.0</b>
<b>Variable costs</b>						
Seed & young plants	7,235	6,713	873	776	6.6	5.4
Fertilisers & composts	1,189	2,241	143	259	1.1	1.8
Crop protection	950	1,338	115	155	0.9	1.1
Market charges	7,434	4,135	897	478	6.8	3.3
Packing materials	9,012	8,513	1,087	985	8.3	6.8
Horticultural sundries	757	1,698	91	196	0.7	1.4
Glasshouse fuel	55	202	7	23	0.1	0.2
Other variable costs	0	0	0	0	0.0	0.0
<b>Total variable costs</b>	<b>26,632</b>	<b>24,839</b>	<b>3,213</b>	<b>2,873</b>	<b>24.5</b>	<b>19.8</b>
<b>Total gross margin</b>	<b>82,214</b>	<b>100,441</b>	<b>9,919</b>	<b>11,617</b>	<b>75.5</b>	<b>80.2</b>
<b>Fixed costs</b>						
Labour:						
Regular paid	15,326	23,506	1,849	2,719	14.1	18.8
Regular unpaid	38,069	42,715	4,593	4,941	35.0	34.1
Casual labour	12,996	14,792	1,568	1,711	11.9	11.8
Power & machinery costs:						
Contract & hire	2,561	2,592	309	300	2.4	2.1
Fuel & electricity	5,723	6,885	690	796	5.3	5.5
Repairs	3,488	4,153	421	480	3.2	3.3
Machinery depreciation	4,534	4,858	547	562	4.2	3.9
Glasshouse depreciation	734	730	89	84	0.7	0.6
Rent (incl. imputed)	13,609	12,780	1,642	1,478	12.5	10.2
Other costs:						
Occupier's repairs	1,534	3,798	185	439	1.4	3.0
Permanent crop depreciation	1,030	1,064	124	123	0.9	0.8
Water	1,258	920	152	106	1.2	0.7
Sundries	8,292	9,375	1,000	1,084	7.6	7.5
<b>Total fixed costs</b>	<b>109,155</b>	<b>128,168</b>	<b>13,169</b>	<b>14,824</b>	<b>100.3</b>	<b>102.3</b>
<b>Management &amp; investment income</b>	<b>-26,941</b>	<b>-27,727</b>	<b>-3,250</b>	<b>-3,207</b>	<b>-24.8</b>	<b>-22.1</b>
Minus: management salaries	21	8	3	1	0.0	0.0
Plus: farmer & spouse labour	30,755	35,939	3,710	4,157	28.3	28.7
<b>Net farm income</b>	<b>3,793</b>	<b>8,204</b>	<b>458</b>	<b>949</b>	<b>3.5</b>	<b>6.5</b>
<b>Farm business income</b>	<b>10,237</b>	<b>14,511</b>	<b>1,235</b>	<b>1,678</b>	<b>9.4</b>	<b>11.6</b>

<sup>^</sup> Data is derived from a modest sample size and thus there is a lower degree of confidence in the figures

**Crop output per cent of total crop output (%)**

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	Average 2020/21	Average 2021/22^
Glasshouse crops	10.3	10.3
Outdoor vegetables:		
Brassicas	33.9	23.7
Legumes	0.0	0.3
Salad crops	1.7	1.1
Other outdoor vegetables	27.0	21.7
Flowers & nursery stock	0.3	0.3
Soft fruit	0.0	0.0
Top fruit	0.6	0.7
Other crops	26.3	41.9
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

**Distribution of tenant's type capital (%)**

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	Average 2020/21	Average 2021/22^
Crops & tillages	1	1
Stores	7	5
Glasshouses	8	6
Equipment	36	32
Livestock	0	0
Other	47	55
<b>Total</b>	<b>100</b>	<b>100</b>
 <b>Tenant's capital (£)</b>	 <b>149,055</b>	 <b>213,390</b>

*\* no premium figures, sample too small*

**Table 2.22 Balance sheet data for horticultural businesses**

Group	All horticulture		Specialist glass		Specialist fruit	
Number of businesses	130		31		40	
Harvest year	2021/22 Opening	2021/22 Closing	2021/22 Opening	2021/22 Closing	2021/22 Opening	2021/22 Closing
<b>Assets</b>						
Fixed assets						
Land,buildings & SPS entitlement	782,939	815,594	497,749	501,336	1,326,420	1,391,790
Breeding livestock	900	904	0	0	3,235	3,250
Machinery & glasshouses	73,483	81,934	104,703	121,562	88,529	99,721
Permanent crops	24,943	23,861	0	0	72,478	69,032
Miscellaneous business assets	573	521	72	68	1,220	1,033
<b>Total fixed assets</b>	<b>882,838</b>	<b>922,814</b>	<b>602,523</b>	<b>622,967</b>	<b>1,491,882</b>	<b>1,564,826</b>
Current assets						
Crops & trading livestock	44,153	47,524	22,241	25,855	23,925	21,036
Goods in store	19,180	21,169	35,311	38,575	12,639	14,858
Liquid assets	121,305	137,449	155,737	193,216	134,757	118,795
<b>Total current assets</b>	<b>184,637</b>	<b>206,142</b>	<b>213,290</b>	<b>257,645</b>	<b>171,321</b>	<b>154,688</b>
<b>Total assets</b>	<b>1,067,475</b>	<b>1,128,956</b>	<b>815,813</b>	<b>880,613</b>	<b>1,663,203</b>	<b>1,719,515</b>
<b>Liabilities</b>						
Bank term loan	65,307	60,939	86,764	93,394	101,700	100,083
Other loans	29,491	36,166	76,624	74,251	35,602	59,829
Bank overdraft	18,229	20,383	11,280	18,891	11,094	12,765
Other short term loans	59,824	62,075	76,313	78,517	80,499	61,887
<b>Total external liabilities</b>	<b>172,851</b>	<b>179,563</b>	<b>250,981</b>	<b>265,053</b>	<b>228,895</b>	<b>234,563</b>
<b>Net worth</b>	<b>894,624</b>	<b>949,394</b>	<b>564,832</b>	<b>615,560</b>	<b>1,434,308</b>	<b>1,484,951</b>
Percentage equity (%)	83.8%	84.1%	69.2%	69.9%	86.2%	86.4%

**Table 2.23 A comparison of net worth and percentage equity by farm type**

	Average Assets 2021/22	Average Liabilities 2021/22	Average Net Worth 2021/22	Average % Equity 2021/22
<b>Defra main farm type</b>				
Cereals	3,272,962	243,981	3,028,981	92.5%
Lowland cattle & sheep	1,301,234	110,175	1,191,059	91.5%
Mixed	2,683,369	277,400	2,405,969	89.7%
General cropping	3,990,229	479,809	3,510,420	88.0%
Horticulture	1,098,216	176,207	922,009	84.0%
Dairy	2,766,702	511,808	2,254,894	81.5%
Pigs	2,213,116	613,939	1,599,178	72.3%
Poultry	2,523,795	816,206	1,707,589	67.7%
<b>All businesses</b>	<b>2,374,701</b>	<b>271,829</b>	<b>2,102,872</b>	<b>88.6%</b>

Group	Specialist HNS		Other horticulture	
Number of businesses	20		39	
Harvest year	2021/22 Opening	2021/22 Closing	2021/22 Opening	2021/22 Closing
<b>Assets</b>				
Fixed assets				
Land,buildings & SPS entitlement	308,373	319,056	787,789	819,209
Breeding livestock	0	0	0	0
Machinery & glasshouses	51,339	61,074	69,402	72,482
Permanent crops	0	0	13,291	12,949
Miscellaneous business assets	864	864	1	1
<b>Total fixed assets</b>	<b>360,576</b>	<b>380,994</b>	<b>870,482</b>	<b>904,641</b>
Current assets				
Crops & trading livestock	79,368	84,088	40,142	47,298
Goods in store	23,573	26,468	16,584	17,383
Liquid assets	150,165	185,900	80,388	101,166
<b>Total current assets</b>	<b>253,106</b>	<b>296,456</b>	<b>137,114</b>	<b>165,847</b>
<b>Total assets</b>	<b>613,682</b>	<b>677,450</b>	<b>1,007,596</b>	<b>1,070,488</b>
<b>Liabilities</b>				
Bank term loan	53,672	41,309	39,770	36,075
Other loans	22,060	20,722	17,197	18,653
Bank overdraft	9,934	12,950	31,702	32,096
Other short term loans	55,102	73,462	42,755	49,388
<b>Total external liabilities</b>	<b>140,768</b>	<b>148,443</b>	<b>131,424</b>	<b>136,211</b>
<b>Net worth</b>	<b>472,914</b>	<b>529,007</b>	<b>876,172</b>	<b>934,276</b>
Percentage equity (%)	77.1%	78.1%	87.0%	87.3%

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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

## **Appendix 1: Reports in this series**

- **Crop Production in England**
- **Dairy Farming in England**
- **Hill Farming in England**
- **Horticulture Production in England**
- **Lowland Grazing Livestock in England**
- **Organic Farming in England**
- **Pig Production in England**
- **Poultry Production in England**

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