Canolfan Organig Cymru
Organic Centre Wales

Welsh Organic Producer Survey 2014

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- All the producers who participated in the survey – we are aware how much the organic sector is over-surveyed and therefore we hope that this report, and any actions that stem from it, will go some way to making your time input worthwhile!
- The Institute of Biological, Environmental and Rural Sciences, Aberystwyth University staff who helped with the phone interviews and collating the survey responses: Tegid Roberts, Rowland Davies, Nick Reeves, Ian Williams, Huw Williams, Dylan Jones, Eric Jones, Eileen Edwards and Brenda Jones, as well as Tony O'Regan for making their input possible.
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Whilst every effort has been made to ensure the accuracy of the results presented in this report, responsibility for any errors rests with the authors and feedback is always welcome. However, the quantification of the scale of the Welsh organic sector is still an imprecise art and there are significant margins for error.

This report is necessarily a summary of a huge quantity of data. Readers wishing for information behind the tables and figures provided are welcome to contact Organic Centre Wales. Also, readers with suggestions for information which would be useful in future reports should contact us.

Executive Summary

The 2014 Welsh organic producer survey was undertaken via a telephone survey during mid-November 2014. Contact details for a total of 715 Welsh organic producers were identified, and 519 producers were contacted (73%). This resulted in 438 completed surveys as 69 producers had decertified from organic farming or retired, with only 12 producers declining to participate.

Welsh organic land and livestock

Land use data collected through the producer survey and organic control body (CB) data available through Defra are summarised in Table A below. The survey collected data recorded approximately 56,000 hectares (ha) of land from 438 respondents. Using the overall survey response rate of 73%, the survey figures were then multiplied up to estimate the total land area of the Welsh organic sector. It was estimated that the sector comprised of approximately 77,000 ha in November 2014. The Defra statistical data from control bodies for the end of 2013 was higher at 100,754 ha, (equivalent to 6.8% of Welsh agricultural land), with this difference in land area probably due to the number of organic holdings that de-certified during 2014. Compared with the total land area in Wales, the organic share is above average for horticulture and forage and below average for arable and other land.

Table A Welsh organically managed land areas by enterprise and organic status (hectares)

	Survey responses				Estimated total from 2014 survey			Defra CB data (end of 2013)		All Wales land** (2011)	
Enterprise	Holdings	Organic	In-conv.	Total	Organic	In-conv.	Total	Holdings	Area	Area	Organic %
Forage	-	53721	0	53721	74000	0	74000	-	95201	1161378	8.2%
Arable	69	1890	0	1890	2600	0	2600	185	3785	88155	4.3%
Hort*	33	99	0	99	140	0	140	133	274	1473	18.6%
Other	-	143	0	143	200	0	200	-	1494	44190	3.4%
Total	438	55854	0	55854	76940	0	76940	786	100754	1475176	6.8%

** Horticulture includes potatoes in this table*
*** All Wales land areas published by Welsh Government (Welsh Agricultural Statistics 2011)*

The number of Welsh organic livestock was also surveyed (shown in Table B below). As with the land areas, estimated total livestock figures for the Welsh organic sector were also estimated using the overall survey response rate of 73%, as well as by using the individual enterprise response rates (e.g. 55%) for beef cattle. These estimates were then compared to Defra CB data, with the estimates based upon the overall survey response rate lower than either the Defra CB statistics or the individual sector calculated estimates. As with the land areas, the decertification of organic holdings will also have reduced the organic livestock numbers during 2014, so the overall survey response rate estimates are probably a better reflection of livestock numbers at the end of 2014.

Table B Welsh organically managed breeding livestock (head)

	Survey recorded data	Estimated total calculated by survey sector response %		Estimated total calculated at overall survey response %		Defra CB data (End of 2013)	All Wales livestock** (2011)	
							Number	Organic %
Breeding Cattle	6432	55%	11600	73%	8900	11155	236833	5%
Breeding Sheep	107677	58%	186000		148300	204231	3722872	5%
Dairy cows	7170	64%	11200		9900	10434	275243	4%
Laying hens	4606	31%	14800		6300	26615	1463722	2%
Sows	12	19%	100		20	677	3488	19%

** Defra 2011 certification body data*
*** All Wales land areas published by Welsh Government (Welsh Agricultural Statistics 2011)*

Sales

Table C presents numbers of organic livestock sold, including survey responses and estimates for the total Welsh organic sector. The results indicate that in 2014 Welsh organic farms produced approximately 8000 finished beef, 115,000 finished lambs and 56 million litres of milk. The proportion of livestock sold organically was similar between years, with 41% of fully organic finished lambs (46,000 lambs), 27% of store cattle (1300 head), and 74% of store lambs (20,000) sold into conventional supply chains due to a lack of organic market, low organic price premiums or livestock not meeting organic market requirements.

Table C Welsh organically managed livestock sales by enterprise and organic status (survey recorded and estimated total Welsh organic sales based on the 73% survey response rate)

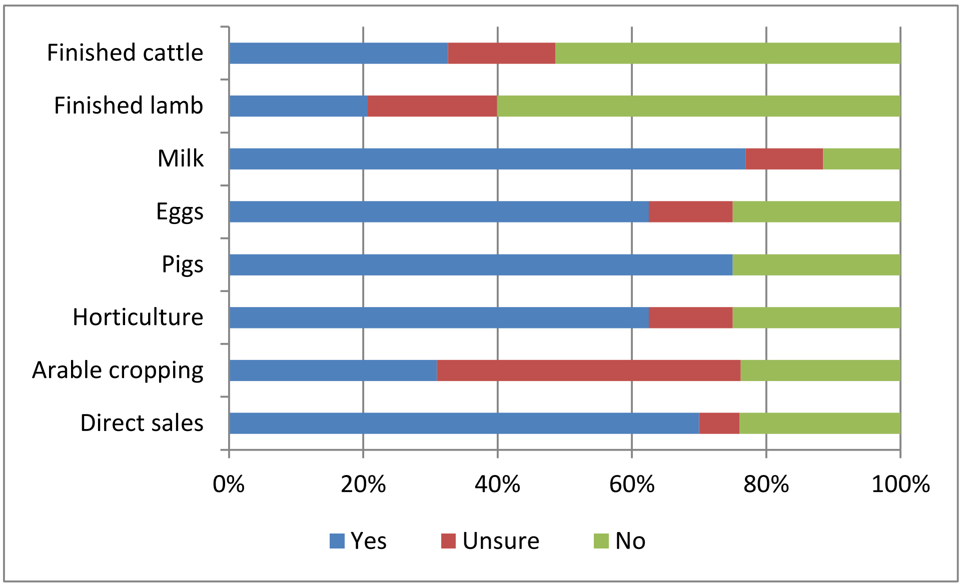
	Survey responses					Estimated number of livestock sold *			
	Organic	In-conv.	Non-organic	**Total**	% non-organic	Organic	In-conv.	Non-organic	**Total**
Finished cattle	5549	15	299	5863	5%	7600	0	400	8000
Store cattle	2585	20	968	3573	27%	3600	0	1300	4900
Finished lambs	48420	1343	33670	83433	41%	67000	2000	46000	115000
Store lambs	5171	0	14375	19546	74%	7000	0	20000	27000
Milk (thou' litres)	40742	0	0	40742	0%	56000	0	0	56000
Eggs (thou' doz.)	461	0	0	461	0%	600	0	0	600
Pigs (all classes)	75	64	55	194	42%	100	100	100	300

**Estimated total calculated with overall survey response rate of 73%*

Future intentions of producers

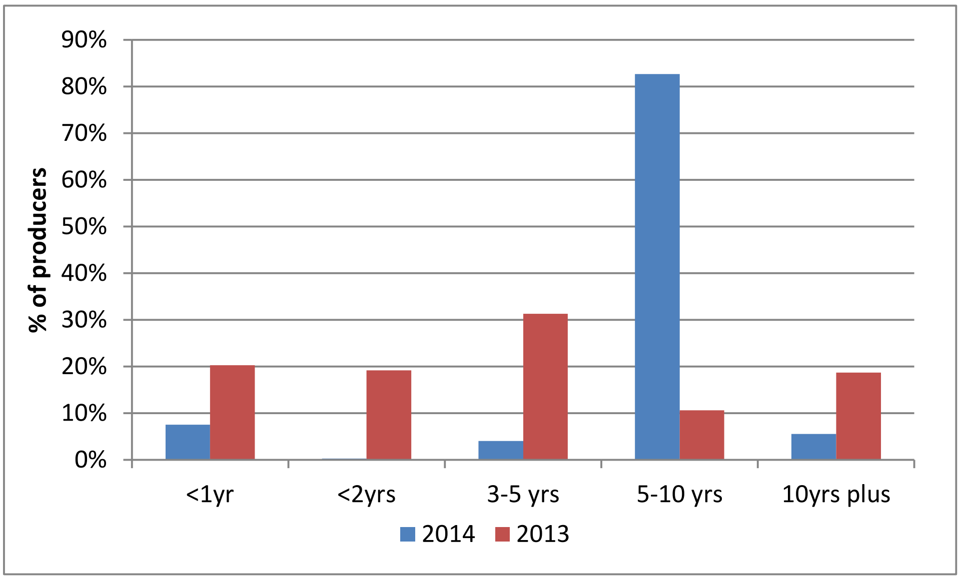
Figure A shows the level of satisfaction of organic producer with the current prices. The figure indicates that finished lamb producers were the least satisfied with current prices, partially reflected in the high numbers of organic lambs sold conventionally. The beef sector was also less optimistic in 2014 than 2013 due to reduced prices and a lower organic premium. However, the other sectors were generally more satisfied, though this situation may have altered for milk producers since November 2014 when the survey was conducted.

Figure A Are current prices high enough to continue organic production?



The survey was undertaken during November, following a period when many Welsh organic producers had taken the decision to de-certify, and just after many respondents (84%) had applied to join the new Glastir Organic scheme. Therefore the sector was considerably smaller, but details of the new scheme were clear. The results in Figure B below show how the majority of 2014 survey respondents indicated their commitment to organic farming for 5 years or more, which stands in sharp contrast to the very mixed situation of 2013 when large numbers indicated they were undecided. However, there was still a group of 8% of respondents that were undecided and were awaiting their invitation to sign a Glastir Organic contract before committing for 5 years.

Figure B How long are you intending to continue organic production?



Conclusion

The 2014 survey continued to receive an excellent response rate from the telephone-only survey method, but results highlighted how the sector has continued to reduce in size over recent years. The majority of beef, milk and cropping outputs are sold into certified organic markets, though the sheep sector and store beef sales continue to suffer high losses to the conventional sector at point of sale.

Whilst a high percentage of producers indicated that they had applied to join the new Glastir Organic scheme, around 16% of respondents had not applied. Among the respondents that had applied there were frequent comments regarding the online only application process and the allocation of land, whilst others were concerned at entering a 5-year agreement. Latest Welsh Government information confirms that a disappointing number of applicants did not ultimately sign a contract to join the scheme.

However, despite the recent losses within the sector, organic sales remained strong and there was optimism in most sectors, though the beef sector was less optimistic due to depressed prices in 2014. As 2015 progresses it is hoped that the sector has now stabilised and there is some potential for increased premiums for beef and lamb, though these would be expected to remain during periods of supply shortage such as late spring in the lamb sector.

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Introduction

As in 2013, the Welsh Government funded the 2014 Organic Centre Wales (OCW) Producer Survey, continuing the series of surveys and reports previously funded as part of the Better Organic Business Link (BOBL) and Farming Connect since 2007. (See http://www.organiccentrewales.org.uk/publications.php?type=Report). The report aims to provide the Welsh organic sector with up-to-date annual, comparable statistical information and provide data that are otherwise not available from other sources. The survey also aims to provide a means for producers to relay their views on the current state of organic farming to OCW partners and policy makers.

Methods

The survey was designed and analysed by Organic Centre Wales with the telephone survey undertaken by specialist farm survey staff within the Farm Business Survey (FBS) unit of IBERS, Aberystwyth University.

The survey contact database was formed through a combination of two data sources: organic certification data supplied to Defra by Control Bodies and the OCW producer database, resulting in a database of 715 producers. The survey questionnaire was developed during September and October 2014 with minimal changes to allow comparison with previous years, comprising of an opening section to capture producers' general views about organic farming, a land area and livestock data section and then sections specific to each enterprise, e.g. beef, sheep etc.. As in recent years, the survey was conducted entirely via telephone, though all producers on the contact list were sent a letter outlining reasons for the survey and the type of questions before the phone calls commenced. The survey phone calls commenced on Thursday 6th November and were concluded by Friday 21st November 2014.

Data collation and analysis was carried out using the same methodology as in previous years, with all survey data extracted to form a database of responses for analysis, and results presented in this report. Where possible, data from the previous year are presented alongside for comparison, though due to slight changes in the survey questions results may not always be comparable.

Survey-collected data are useful, but to fully understand the implications of the data collected, it is valuable to have figures for the whole organic sector in Wales. Therefore to give estimated results at Welsh organic sector level, it is necessary to multiply up the survey-collected figures to attempt to present a 100% response level. In the past and for this report the survey response rate is used to scale up data. This is achieved by dividing the actual survey data by the response percentage. The survey response rate for each enterprise was calculated by dividing the number of each enterprise survey responses divided by the number of enterprises indicated within the Defra certification data (see appendix 1). The overall survey response rate was also used to calculate data and is shown for comparison.

Although this methodology is subject to error and caution should be used when using these data, it does allow for improved interpretation of the figures. For the 2014 report, estimates of the 100% organic data are shown via both overall survey response and enterprise response.

Defra organic certification statistics at 1st January 2014 (collected during 2013)

Organic Centre Wales receives certification data from Defra on an annual basis (see appendix 1). These data are collected through annual inspection visits to producers by the organic certification bodies (CBs) and are reported to Defra as required under EU organic legislation. Using this data, OCW undertakes a detailed analysis, providing an estimate of the area of organic and in-conversion land and numbers of livestock within Wales, with results shown in Table 1, below. Based on certification data collected during 2013 and Welsh agricultural data released by the Welsh Government[1] (2011 was the latest detailed data available at time of analysis), the figures show an 18% decrease in the Welsh organic land area in 2013, to 100,754 ha; equivalent to 6.8% of Welsh agricultural land. The total tillage area appeared to suffer a larger decrease with 31% less cropped land.

Table 1 Welsh certified organic and in-conversion holdings and land use, end 2011 to end 2013

		end 2011	**end 2012**	**end 2013**	***12-13 Change***	**All Wales 2011***	**Approx. organic % of Welsh agric. land***
Certified organic holdings	No.	1006	964	786	-18%	23884	3.3%
Total Area	**Ha**	121093	122718	100754	-18%	1475176	6.8%
Cereals	Ha	3193	2863	2191	-23%	55066	4.0%
Other arable/fodder crops	Ha	3317	2638	1590	-40%	30550	5.2%
Potatoes	Ha	38	41	5	-88%	2539	0.2%
Horticulture (exc. Potatoes)	Ha	342	271	269	-1%	1473	18.6%
Total tillage area	Ha	6928	5854	4059	-31%	89628	4.5%
Temp grass	Ha	9474	9662	8946	-7%	116681	7.7%
Arable land (inc temp grass)	Ha	16402	15517	13004	-16%	206309	6.3%
Permanent grass/rough grazing	Ha	102464	105517	86255	-18%	1044697	8.3%
Woodland/other	Ha	2227	1684	1494	-11%	44190	3.4%

** All Wales data for 2011 (Welsh Government)*

[1] http://wales.gov.uk/statistics-and-research/welsh-agricultural-statistics/?lang=en

Welsh organic livestock data from control bodies are shown in Table 2 and highlight a decrease in ruminant livestock numbers, but expanding numbers of pigs and poultry. Reductions in beef and sheep were at around 18%, whilst reductions in dairy cows were less severe at 8%.

Table 2 Welsh certified organic and in-conversion livestock (head), end 2011 to end 2013

	end 2011	**end 2012**	**end 2013**	***12-13 Change***	**All Wales 2011**	**Approx. organic % of Welsh livestock***
Beef cows	14111	13541	11155	-18%	236833	4.7%
Dairy cows	13868	11340	10434	-8%	275243	3.8%
Other cattle	32516	31985	28649	-10%	611373	4.7%
Ewes	255182	246559	204231	-17%	3722872	5.5%
Other sheep	275851	275346	205068	-26%	4896542	4.2%
Laying hens	38251	25442	26615	5%	1463722	1.8%
Table birds	104394	100192	137064	37%	5872847	2.3%
Other poultry	9651	8647	38185	342%	609499	6.3%
Sows	72	99	677	584%	3488	19.4%
Other pigs	357	378	393	4%	22321	1.8%
Other livestock	3604	488	675	38%	no data	-

** All Wales data for 2011 (Welsh Government)*

Survey response rates

Table 3 below indicates that the survey achieved an overall completion rate of 73% with 519 out of a possible 715 producers contacted, though the survey team identified 63 producers who had decertified from organic production within the last 12 months.

Table 3 Survey responses

	Number	**%**
Organic producer contact list	715	
Producers contacted (overall response rate)	**519**	**73%**
Declines	12	2%
Reverted to non-organic	63	12%
Given up farming	6	1%
Survey completed	**438**	**84%**

Approximately 25% of the respondents elected to complete the survey through the medium of Welsh; whilst 5% of respondents were under 40 years, 62% were between 40 and 60, and 33% were over 60.

The survey comprised of a general section and then various enterprise specific sections e.g. beef, lamb, milk etc. To enable scaling up of survey results to full Welsh organic sector level, survey response rates of different enterprises were calculated. The number of completed enterprise sections is divided by the number of enterprises identified from the Defra data (see Table 1 and Table 2 above). The enterprise completion percentage is then used to estimate organic area and livestock figures for the Welsh organic sector. Due to the reduction in sector size, the 2014 survey showed a reduction in the number of enterprise sections completed though their percentage completion rates (based upon Defra CB data) showed a similar or increased completion rate. In particular the number of producers completing the direct sales section was higher, despite the reduction in numbers of producers.

Table 4 Completed survey sections compared to enterprises identified from certification data

Enterprise type	2014 survey	2013 survey	Defra CB data		Survey completion rate	
			2014	2013	2014	2013
Beef	241	305	435	547	55%	56%
Sheep	271	345	468	623	58%	55%
Dairy	55	56	86	104	64%	54%
Pigs	6	8	31	40	19%	20%
Eggs	19	24	61	63	31%	38%
Fruit & Vegetables	33	31	133	162	25%	19%
Grains & Pulses	69	73	185	246	37%	30%
Direct sales	56	38	n/a	n/a	n/a	n/a

Welsh organic and in-conversion farms

Organic farms continue to be a prominent feature of Welsh agriculture, but the 2013 and 2014 surveys have highlighted the significant number of organic producers who have de-certified from organic production. However, the recent application window for the Glastir Organic has received a number of applicants wishing to convert land.

Reasons for reversion to non-organic farming in Wales

During both 2013 and 2014, a number of producers de-certfied from organic production, with 150 respondents confirming their de-certification through the 2013 survey and a further 63 respondents informing the 2014 survey that they had decertified in 2014 (see Table 3). Producers indicating that they had reverted were briefly asked why they had taken this decision, with results presented in Table 5 below. The primary reason for de-certification was listed as a lack of organic premium but there was a wide mixture of reasons indicated.

Table 5 Reasons for reverting to non-organic farming (producers reverting between Jan and Nov 2014)

Retired/family reasons	10%
High feed price	7%
Lack of organic premium	24%
Lack of organic market	12%
Certification costs	7%
Certification rules	3%
OFS agreement ending	9%
Expect future OFS to be low	6%
Technical issues	9%
Other	14%
Number	*63*

Glastir Organic

During autumn 2014, the Welsh Government launched its replacement for the Organic Farming Scheme, called Glastir Organic, and producers were invited to apply during October. As part of the 2014 producer survey respondents were asked if they had applied to join the scheme (expression of interest), and provide any additional comments. A total of 365 (84%) of respondents confirmed they had applied, but 70 respondents (16%) had chosen not to. In terms of feedback, there were many comments related to the online system for application which some felt was unfair due to their ability to use technology or the availability of broadband internet connection, as well as a few producers not realising they needed to apply. There were also a number of comments related to the lower level of payment for hill land and the automated classification of land within the application process that some producers had challenged. Many of the reasons for not applying related to the 5-year commitment in relation to market uncertainty or management options (e.g. son taking over business and doesn't wish to limit options), as well as the minimum land area of 3 hectares preventing some producers from applying. At the time of surveying (Nov 2014) a few producers indicated they had applied, but were waiting for further information before fully committing and recent figures from Welsh Government confirm that a number of producers did not ultimately join the Glastir Organic scheme despite applying.

Welsh Organic Sector (survey results)

As indicated in the previous section, the organic certification data supplied to Defra was collected over a 12 month period; therefore the data are always out of date by the time of release. The 2014 producer survey continued to request producers to provide basic information about their land, its use and their land's organic status. The compiled land data shown in Table 6 provides information for both aggregate land types and individual crops in 2013/14.

Table 6 Organic and in-conversion land area (ha) in Wales (survey results)

	Fully organic		In-conversion		% land split	
	Area ha	% split	Area ha	% split	Org %	In-conv %
All forage	53721	96.2%	0	0%	100.0%	0.0%
Arable	1890	3.4%	0	0%	100.0%	0.0%
Horticulture	99	0.2%	0	0%	100.0%	0.0%
Other	143	0.3%	0	0%	100.0%	0.0%
Total	**55854**	**100%**	**0**	**0%**	**100%**	**0%**
Grassland (inc. rough grazing)	53721	96.2%	0	0%	100%	0%
Fodder crops (inc. legumes, roots)	300	0.5%	0	0%	100%	0%
Arable forage	672	1.2%	0	0%	100%	0%
Arable crops (combined)	918	1.6%	0	0%	100%	0%
Potatoes	6	0.0%	0	0%	100%	0%
Horticulture (exc. Potatoes)	93	0.2%	0	0%	100%	0%
Other	143	0.3%	0	0%	100%	0%

Based upon the data collected through the survey, land data was then scaled up to estimate Welsh organic sector totals for the various categories, based on the overall survey response rate of 73%. (see Table 7). The data for fully organic land shows the majority of land (ca. 96%) is forage with the arable area (including fodder and cereal crops) accounting for most of the remainder, whilst the Welsh horticultural area remained very small. The area of land in-conversion was zero due to the very low number of producers currently in conversion. When compared to 2013 Defra data Table 7 shows the reduction in land area due to further decertifications during 2014.

Table 7 Organic and in-conversion land area (ha) in Wales (estimated total areas and end of 2013 CB data)

Crop Type	**Survey response rate**	**Estimated total Welsh areas from survey response rate**			**Defra CB data end of 2013**
		Organic	In-conv	Total	Total
Grassland (inc. rough grazing)	**73%**	74000	0	74000	95201
Arable		2600	0	2600	3780
Horticulture		140	0	140	278
Other		200	0	200	1494
Totals		76940	0	76900	100754
Grassland (inc. rough grazing)	**73%**	74000	0	74000	95201
Fodder crops (inc. legumes, roots)		400	0	400	-
Arable forage		900	0	900	-
Arable crops (combined)		1300	0	1300	2191
Potatoes		10	0	10	5
Horticulture (exc. Potatoes)		130	0	130	274
Other		200	0	200	1494

Livestock numbers

Respondents were asked to provide details of organic and in-conversion livestock retained on their holdings at 31st October 2014, shown in Table 8, below.

Table 8 Survey recorded organic/in conversion breeding stock retained in 2014 and 2013

	Organic 2014		In-conversion 2014		2014 Total	2013 Total
	Head	n	Head	n	Head	Head
Breeding Cattle	6432	*202*	0	*0*	6432	8584
Growing Cattle	11057	*217*	0	*0*	11057	14398
Replacement Beef Heifers	665	*91*	0	*0*	665	916
Breeding Sheep	107677	*265*	0	*0*	107677	136771
Growing Sheep	26703	*181*	0	*0*	26703	20487
Ewe Lamb Replacements	22661	*218*	0	*0*	22661	28152
Dairy cows	7170	*55*	0	*0*	7170	6009
Dairy heifers	4284	*55*	0	*0*	4284	3109
Laying hens	4606	*15*	0	*0*	4606	12920
Sows	12	*3*	3	*1*	15	26

The 2014 data generally shows a reduction in livestock numbers recorded through the producer survey, associated with the reduction in numbers of producers. From the survey collected data, estimated livestock numbers at Welsh organic sector level were then calculated. For comparison, this calculation was undertaken both by calculating the response rate per individual enterprise, as well as by using the overall survey response rate of 73%. Table 9 (estimates from sector-specific response rates) and Table 10 (estimates from overall survey response rate) indicate the estimated Welsh organic sector stock numbers.

Table 9 Estimated total Welsh organic and in-conversion livestock (using individual sector response rates)

	Sector response rate	Organic 2014	In-conversion 2014	2014 Total (Rounded)	2013 Estimate*
		Head	Head	Head	Head
Breeding Cattle	55%	11610	0	11600	15400
Growing Cattle		19958	0	20000	25800
Replacement Beef Heifers		1200	0	1200	1600
Breeding Sheep	58%	185951	0	186000	247000
Growing Sheep		46114	0	46100	37000
Ewe Lamb Replacements		39134	0	39100	50800
Dairy cows	64%	11211	0	11200	11200
Dairy heifers		6699	0	6700	5800
Laying hens	31%	14788	0	14800	33900
Sows	19%	62	16	100	100

** 2013 estimates were calculated at 2013 sector specific response rates (see 2013 Producer Survey report)*

Table 10 Estimated total Welsh organic and in-conversion livestock (using overallsurvey response rate)

	Survey response rate	Organic 2014	In-conversion 2014	2014 Total (Rounded)	2013 Estimate*
		Head	Head	Head	Head
Breeding Cattle	73%	8861	0	8900	11500
Growing Cattle		15233	0	15200	19300
Replacement Beef Heifers		916	0	900	1200
Breeding Sheep		148341	0	148300	183000
Growing Sheep		36787	0	36800	27400
Ewe Lamb Replacements		31219	0	31200	37700
Dairy cows		9878	0	9900	8000
Dairy heifers		5902	0	5900	4200
Laying hens		6345	0	6300	17300
Sows		17	4	20	30

** 2013 estimate assumed a 75% survey response rate overall (see 2013 Producer Survey report)*

Organic and in conversion livestock numbers, summarised in Table 11, indicate survey collected numbers and estimated Welsh totals, in addition to 2013 certification data from Defra for comparison. In general, the enterprise specific estimates match the Defra CB data more closely, with estimates based upon the overall response rate lower than Defra statistics. However, due to the reduction in numbers of organic producers estimates based upon the overall survey rate may be more reflective of the current situation.

Table 11 2014 survey-collected and estimated total Welsh organically managed livestock data, with 2013 Defra CB data for comparison

	Actual survey data	Calculated by survey sector response %		Calculated at overall survey response %		Defra CB data*
Breeding Cattle	6432	55%	11600	73%	8900	11155
Growing Cattle	11057		20000		15200	
Replacement Beef Heifers	665		1200		900	
Breeding Sheep	107677	58%	186000	73%	148300	204231
Growing Sheep	26703		46100		36800	
Ewe Lamb Replacements	22661		39100		31200	
Dairy cows	7170	64%	11200	73%	9900	10434
Dairy heifers	4284		6700		5900	
Laying hens	4606	31%	14800	73%	6300	26615
Sows	12	19%	100	73%	20	677

** Defra CB data end of 2013*

Farm diversification

As indicated in previous producer survey reports, farm diversification is often a significant source of income for organic farms. Table 12 indicates that in 2014, 35% of the organic farms surveyed had a diversified enterprise, higher than 25% indicated in the 2013 survey, though this may be connected to the farms that have remained within the organic sector. In particular, diversification into renewable energy has increased in importance in the sector.

Table 12 Reported level of diversification within Welsh organic and converting farm businesses, 2014

	2014		2013	
	%	*n*	%	*n*
Farm has a diversified enterprise	35%	*154*	25%	*133*
On farm processing	4%	*19*	3%	*18*
On farm retailing	5%	*20*	3%	*16*
Educational activities	2%	*8*	1%	*6*
Tourism activities (with food)	3%	*11*	2%	*11*
Tourism activities (without food)	8%	*35*	6%	*30*
Agricultural contracting	4%	*19*	3%	*14*
Renewable energy	17%	*76*	8%	*45*
Other	5%	*20*	5%	*27*
Multiple diversification enterprises	10%	*45*	6%	*30*

Organic Sales

Certified organic crops and livestock may be sold to organic outlets or non-organic outlets at conventional prices. This section analyses the quantities and proportions of output marketed as organic.

Livestock sales

Livestock sales recorded through the producer survey are presented in Table 13. Sales were recorded as those sold to as certified organic, those sold as in-conversion and those sold conventionally, e.g. due to a lack of organic market. Survey recorded data (Table 13), indicated that reported organic sales were greater for finished cattle, milk and eggs but lower for other output. In-conversion status sales were minimal.

Table 13 Reported livestock sales 2014 (with 2013 data for comparison)

	Organic		Non-organic sales				Total		*Responses*	
			In-conversion		Other reason				*n*	
	2014	2013	2014	2013	2014	2013	**2014**	**2013**	*2014*	*2013*
Finished cattle	5549	4867	15	24	299	156	5863	5047	*117*	*152*
Store cattle	2585	3476	20	73	968	1737	3573	5286	*152*	*190*
Finished lambs	48420	61953	1343	978	33670	42088	83433	105019	*238*	*290*
Store lambs	5171	5938	0	672	14375	13283	19546	19893	*91*	*111*
Milk (thou' litres)	40742	34369	0	0	0	30	40742	34399	*55*	*56*
Eggs (thou' doz.)	461	455	0	0	0	2	461	457	*19*	*24*
Pigs (all classes)	75	198	64	5	55	7	194	244	*8*	*8*

Results shown in Table 14 indicate that total non-organic sales as a percentage of total sales were similar between 2013 and 2014. However, when analysing the reasons given for selling non-organically, it can be observed that the majority of non-organic beef sales were due to a lack of organic market, whilst lamb producers chose to sell non-organically because of difficulties meeting the organic specification or the organic premium was minimal.

Table 14 Reported non-organic livestock sales in 2014 and % split of non-organic sales (exc. in-conversion). (2013 data for comparison)

	Reported non-organic sales (exc. in-conv.)		Non-org sales as % of total sales		Due to finishing spec / high conv. Prices		Due to lack of organic market		Due to other reasons	
	2014	2013	2014	2013	2014	2013	2014	2013	2014	2013
Finished cattle	299	156	5%	3%	11%	53%	60%	33%	29%	14%
Store cattle	968	1737	27%	33%	32%	42%	30%	31%	38%	27%
Finished lambs	33670	42088	40%	40%	56%	29%	36%	59%	8%	12%
Store lambs	14375	13283	74%	67%	37%	16%	50%	63%	14%	21%
Milk (thou' litres)	0	30	0%	0%	0%	0%	0%	100%	0%	0%
Eggs (thou' doz.)	0	2	0%	0%	0%	0%	100%	0%	0%	100%

As with the retained livestock data (see Table 8), the actual livestock sales recorded by the survey were scaled up to estimate sales at Welsh organic sector level, with values calculated by two methods (overall and sector specific response rates). Table 15 shows data multiplied up by the individual sector response rates. Table 16 shows data multiplied up by the overall survey response rate of 73%.

Data within Table 15 and Table 16 indicate similar organic sales for many sectors in 2014, but lower organic sales of finished and store lamb. In-conversion and other non-organic sales generally declined, though more finished beef was sold non-organically.

Table 15 Estimated total Welsh produced organic livestock sales (based on sector specific response rates)

	Sector response rate	Organic		Non-organic sales				Total	
				In conversion		Other non-organic			
		2014	2013	2014	2013	2014	2013	2014	2013
Finished cattle	55%	10000	8700	0	0	500	300	10600	9100
Store cattle	55%	4700	6200	0	100	1700	3100	6400	9500
Finished lambs	58%	84000	112000	2000	2000	58000	76000	144000	190000
Store lambs	58%	9000	11000	0	1000	25000	24000	34000	36000
Milk (thou' litres)	64%	64000	64000	0	0	0	100	63700	63900
Eggs (thou' doz.)	31%	1500	1200	0	0	0	0	1500	1200
Pigs (all classes)	19%	400	1000	300	0	300	0	1000	1200

** 2013 estimates calculated at 2013 sector specific response rates*

Table 16 Estimated total Welsh produced organic livestock sales (based on overall survey response rate)

	Survey response rate	Organic		Non-organic sales				Total	
				In conversion		Other non-organic			
		2014	2013	2014	2013	2014	2013	2014	2013
Finished cattle	73%	7600	6400	0	0	400	200	8100	6600
Store cattle		3600	4600	0	100	1300	2300	4900	7000
Finished lambs		67000	82000	2000	1000	46000	55000	115000	138000
Store lambs		7000	8000	0	1000	20000	17000	27000	26000
Milk (thou' litres)		56000	45000	0	0	0	0	56100	45300
Eggs (thou' doz.)		600	600	0	0	0	0	600	600
Pigs (all classes)		100	300	100	0	100	0	300	300

** 2013 estimate assumed a 75% survey response rate overall*

Cattle sales

Figure 1 indicates that virtually all finished cattle sales were sold into organic markets in 2014. The finished cattle price graph Figure 2, indicates the contrast in beef prices between 2013 and 2014, with both organic and conventional sectors suffering large price falls during late 2013 and early 2014. The organic premium had also reduced from over £1/kg DW to less than 50p/kg DW between July 2013 and September 2014, though there appeared to be a slight recovery in prices and premium during late 2014.

Figure 1 Finished cattle sales 2014 and 2013

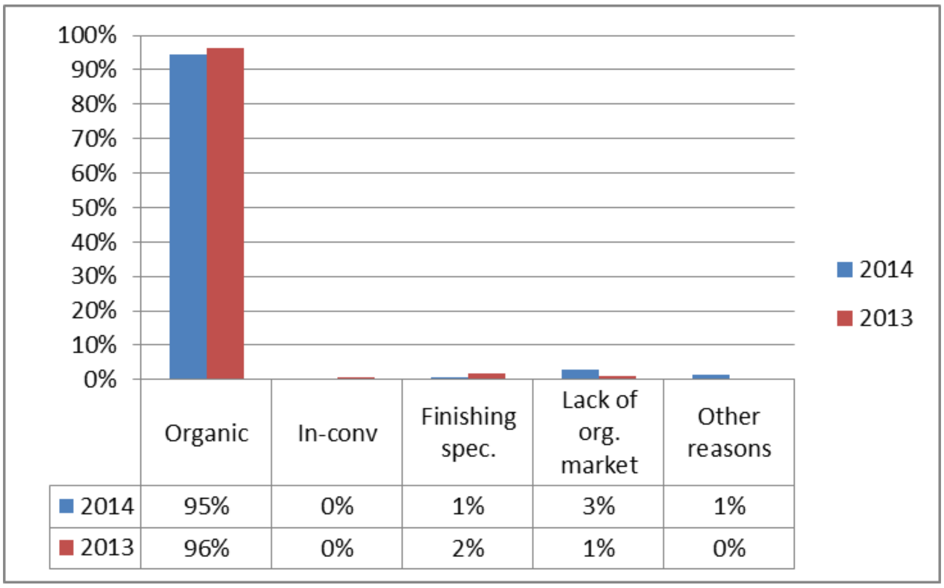
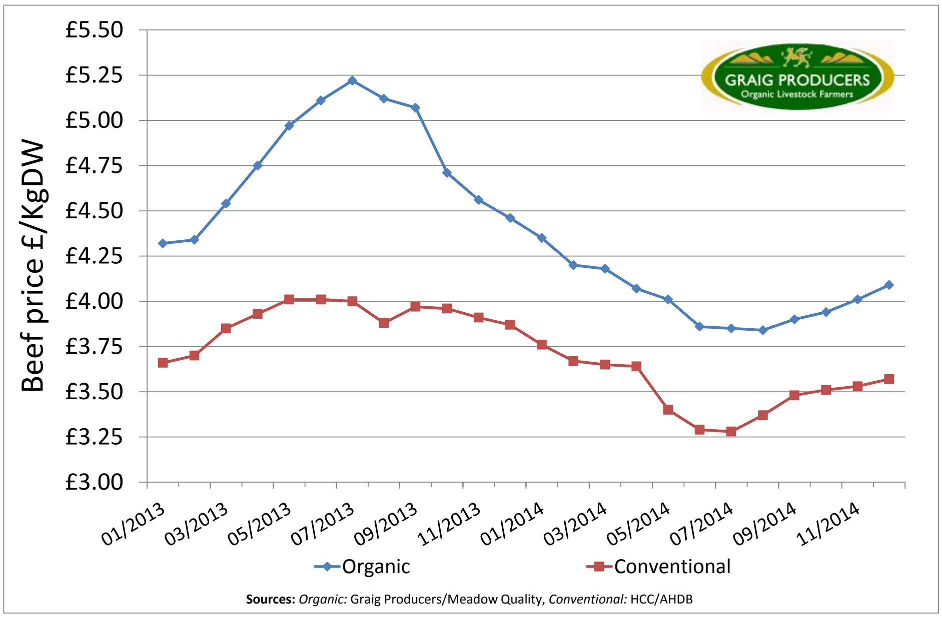


Figure 2 Finished cattle prices 2014 and 2013 (organic and conventional)

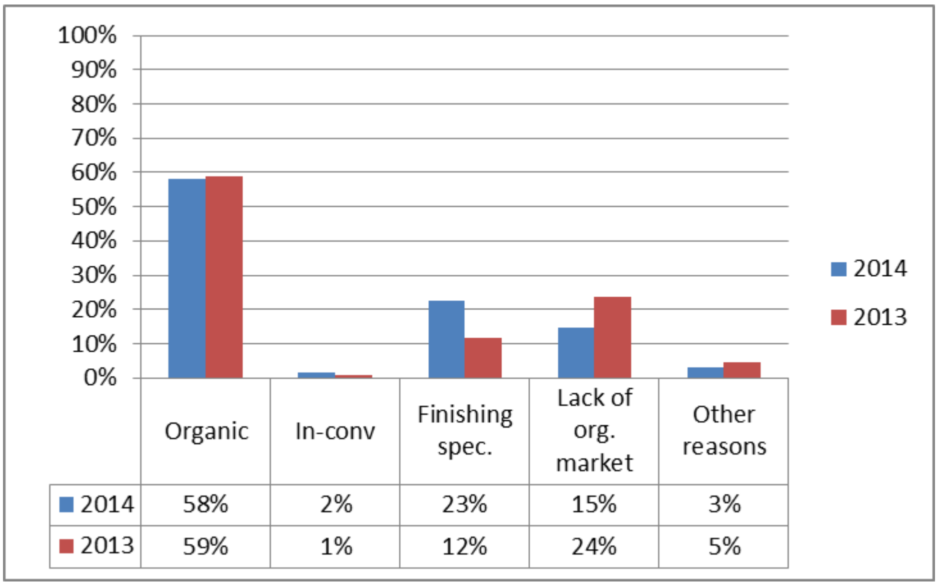


Store cattle sales appeared to be lower overall but the percentage of non-organic sales fell slightly to 27%.

Sheep sales

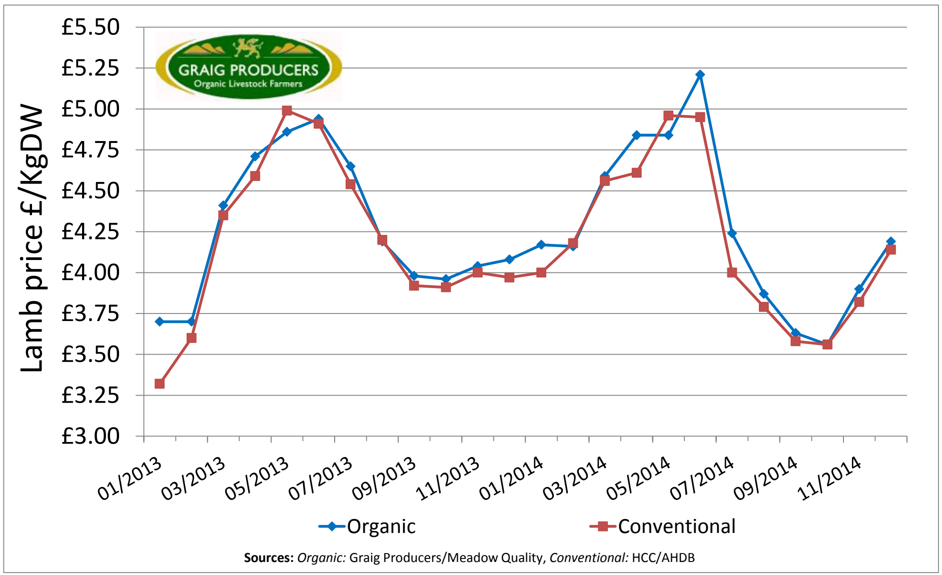
The percentage of total organic finished lambs sold organically remained at about 60% in 2014. The percentage of non-organic sales (excluding livestock in-conversion) decreased slightly to 40% of total sales, with the majority sold conventionally due to finishing specification or high conventional prices, compared to a lack of organic market in 2013. Figure 4 indicates that during 2014 the organic lamb price remained very similar to the conventional price with few months when there was a premium available.

Figure 3 Finished lamb sales 2014 and 2013



	Organic	In-conv	Finishing spec.	Lack of org. market	Other reasons
2014	58%	2%	23%	15%	3%
2013	59%	1%	12%	24%	5%

Figure 4 Finished lamb prices 2014 and 2013 (organic and conventional)



The proportion of store lambs sold non-organically increased to 74% in 2014 and this remains a key area of livestock loss from the organic supply chain.

Milk sales

Milk sales data from the survey indicate that overall organic milk sales were higher in 2014, at around 60 million litres, with minimal non-organic sales. Organic milk price data are still not readily available, but surveyed producers indicated that they received an average of 37.3 ppl in 2014, considerably higher than 33.0 ppl in 2013, though it is expected that prices will have reduced since November.

Egg sales

Organic egg sales appeared to be similar or slightly higher in 2014, though due to the small sample and large scale of some producers the margin of error can be quite large. The average price received was slightly lower in 2014 at £2.58 per dozen, compared to £2.62 in 2013 but this varied greatly between producers selling in bulk (typically £1.50/dz.) or direct to the public (e.g. £2.50 plus).

Pig sales

Organic pig sales appeared to be lower in 2014, reflecting the lower survey collated sow numbers, though the number of producers is very small in Wales, which affects the robustness of estimates, and Defra statistics indicated that pig numbers had actually increased.

Livestock marketing routes

Sales from beef and sheep livestock enterprises were recorded by their marketing route, indicating the sales split between different marketing routes for finished stock (Table 17) and store stock (Table 18).

Table 17 Marketing route of organically produced finished beef and lamb sales (2011 to 2014)

	Finished cattle				Finished lamb			
	2014	2013	2012	2011	2014	2013	2012	2011
Direct to Abattoir	78%	79%	77%	69%	58%	66%	60%	57%
Producer Group	12%	8%	9%	14%	1%	3%	4%	6%
Livestock mart.	2%	2%	4%	7%	33%	24%	31%	34%
Direct to public	8%	11%	10%	11%	7%	7%	5%	3%
n	*119*	*143*	*151*	*150*	*237*	*295*	*376*	*372*

The 2014 survey indicates a slight decrease in the percentage of finished stock that was sold direct to an abattoir for both finished beef and lamb. This trend contrasts with the previous pattern of ever increasing direct sales to an abattoir, and one hypothesis is that due to changes in the organic sector that farms that remain are less reliant on direct to abattoir sales, though it remains to be seen if this is a pattern or an anomaly.

Table 18 Marketing route of organically produced store cattle and lamb sales (2011 to 2014)

	Store cattle				Store lamb			
	2014	2013	2012	2011	2014	2013	2012	2011
Producer Group	2%	5%	2%	2%	2%	0%	2%	4%
Livestock mart.	64%	60%	68%	70%	72%	77%	75%	73%
Direct to another producer	34%	36%	30%	28%	27%	23%	23%	22%
n	*146*	*184*	*241*	*246*	*92*	*103*	*139*	*166*

The store marketing routes for cattle and lamb highlights the high reliance upon marketing through livestock markets, and whilst producer groups encourage sales and purchases through their producer linkages these remain minimal in terms of overall numbers.

Livestock feed & fodder

Purchased and homegrown feed usage is shown in Table 19, with most of the beef sector's feed requirements continuing to be sourced as straight cereals with compound feed comprising only 18% of total requirements. Compound feed continued to comprise a much higher percentage of total feed used for sheep production at 73% of the total. The organic dairy sector continued to use large quantities of compound feed, as well as straights, with almost 9736t recorded through the survey.

Based on the overall response rate for the survey (73%), it can be estimated that total organic ruminant concentrate feed requirements for Wales were around 15,327 tonnes, considerably lower than the estimated requirement of 16,792t in 2013, 28,500t in 2012 and 21,000t in 2011, reflecting the reduction in Welsh organic sector size.

Table 19 Organic livestock concentrate feed use, proportion bought-in, prices and availability

		Feed used		Feed source			Feed prices		Feed availability*	
		t	n	Home-grown	Bought-in	n	£/t	n	rating	*n*
Beef	Cereal	3088	*47*	90%	10%	*48*	218	*7*	1.2	*18*
	Protein	79	*7*	20%	80%	*5*	430	*6*	1.3	*4*
	Compound	715	*83*				342	*78*	1.4	*71*
Sheep	Cereal	327	*37*	86%	14%	*36*	185	*4*	1.6	*11*
	Protein	19	*11*	25%	75%	*4*	952	*10*	1.0	*8*
	Compound	922	*131*				378	*125*	1.4	*100*
Dairy	Cereal	1188	*14*	77%	23%	*17*	226	*4*	1.4	*7*
	Protein	135	*2*	-	-	*0*	425	*2*	1.5	*2*
	Compound	8413	*53*				326	*51*	1.3	*48*
Pigs & Poultry	Cereal	67	*4*	70%	30%	*2*	200	*2*	1.0	*2*
	Protein	-	*1*	-	-	*0*	-	*0*	-	*0*
	Compound	374	*23*		0	*0*	367	*22*	1.4	*20*

** Feed availability rated from 1=Good, 2=Sufficient, 3=Difficult, 4=Poor, 0=Don't know/no view*

The proportion of home-grown ruminant feed varied from as high as 90% for cereals fed down to 20% for protein fed to beef cattle. Compound and cereal prices were very similar to 2013 with the average ruminant compound feed costing £348/t, identical to the average price in 2013. Cereals fed to ruminants averaged at about £210/t, lower than £244/t in 2013. Protein prices remained more variable between sectors, averaging £602/t, considerable greater than £479/t in 2013 for ruminants. The pig and poultry sectors were more reliant on bought-in compound feed, but averaged a much lower value of £367t compared to £436/t in 2013. Due to small sample sizes, estimating the total organic feed requirements for pig and poultry sectors was difficult, but using the overall survey response rate of 73% indicated an estimated total of 776t, lower than in 2013 or 2012.

Livestock technical issues

Table 20 highlights the technical issues identified by producers within their organic livestock production system. Forage production remained the main concern within the ruminant systems, but it should be noted that the overall level of technical issues was much lower in 2014 than 2013. Although there may be a number of factors such as weather, it is possible that the decertification of a number of producers has resulted in the remaining producers being the more technically competent in organic farming methods, i.e.

the sector now has greater experience of successful organic methods than it comprised as a larger sector two years ago.

Table 20 Technical issues identified with organic livestock production (2014 and 2013)

	Beef		Lamb		Milk	
	2014	2013	2014	2013	2014	2013
Forage	5%	10%	4%	9%	4%	21%
Health	2%	6%	7%	7%	5%	16%
Concentrate (energy)	2%	3%	1%	3%	13%	4%
Biosecurity	2%	0%	0%	0%	2%	5%
Concentrate (protein)	1%	0%	0%	1%	4%	0%
Breeding (choice of breed)	1%	1%	1%	1%	4%	2%
Infrastructure	0%	0%	0%	0%	0%	2%
Other	5%	4%	3%	4%	4%	2%
N	*40*	*69*	*45*	*86*	*25*	*20*

Horticulture and arable cropping

Horticulture

Data collection within the horticultural sector has proved difficult due to the small number of producers and the large variety of crops, as well as the varying markets supplied. Table 21 indicates the areas of differing horticultural crop types and the average marketing route for that crop type. It was not possible to quantify output due to the high number of crops and varying scale of operations. Holdings producing mixed market crops and field vegetables were the most prevalent, with a high percentage of produce sold direct to the public though a significant percentage of potatoes and other crops were sold via wholesalers or in bulk.

Table 21 Horticulture production, prices and market split

	Area (ha)	Marketing routes			
		Direct to public	Wholesale	Bulk	*n*
Mixed market garden	20.9	81%	19%	0%	16
Potatoes	8.2	63%	37%	0%	7
Field veg	27.5	77%	23%	0%	13
Fruit	19.2	67%	17%	17%	6
Other crops	28.0	53%	0%	48%	3
Total	**104**				
n	*44*				

Table 22 indicates that less responding horticultural growers experienced difficulties in controlling weeds during the 2014 growing season, but disease and other factors continued to affect many.

Table 22 Percentage of horticultural producers experiencing difficulties with various factors

Difficulty	2014	2013	2012	2011
Weeds	15%	26%	22%	41%
Seeds	0%	3%	4%	14%
Disease	9%	0%	4%	3%
Labour	3%	0%	0%	3%
Climate change	0%	10%	11%	7%
Machinery	0%	0%	2%	7%
Other	21%	10%	24%	24%
n	*16*	*15*	*31*	*29*

Producers were asked about any marketing difficulties they had experienced but the response was very low so cannot be published, which hopefully indicates that marketing isn't currently a major issue.

Arable cropping

Table 23 indicates that in 2014 the largest arable crop areas continued to be barley, oats and wheat, with the majority of barley and oats being produced for home-grown feed. Average prices obtained by producers were more variable than in 2013, with lower barley prices, but considerably higher oat prices, and are probably very dependent upon the marketing route chosen.

Table 23 Arable production, prices and marketing route (2014 harvest)

	Area (ha)	Total prod. (t)	Sales vol. (t)	Price (£/t)		Marketing routes			
				2014	2013	Direct to farmer	Direct to processor	Bulk buyer	*n*
Wheat	159	975	-	-	-	-	-	-	*3*
Barley	342	1711	15	185	211	-	-	-	*2*
Oats	267	1055	193	331	211	69%	31%	0%	*9*
Triticale	1	3	-	-	-	-	-	-	*0*
Peas or beans	18	18	46	-	-	-	-	-	-
Cereal/legume	119	-	-	-	-		-	-	-
Other crops	-	-	-	-		-	-	-	*0*
Total/Average	913	4241	297	290	218				
n	*89*	*89*	*13*	*15*	*21*				

- data not shown due to small sample size

Similarly to 2012, Table 24 indicates that almost 30% of arable producers experienced difficulties in controlling weeds during the 2014 growing season, with other factors also affecting some producers, including challenges from changing climate and weather concerns.

Table 24 Percentage of arable producers experiencing difficulties with various factors

Difficulty	2014	2013	2012	2011
Weeds	26%	27%	28%	60%
Seeds	0%	0%	1%	0%
Disease	0%	1%	1%	0%
Labour	0%	0%	1%	0%
Climate change	6%	1%	11%	6%
Machinery	4%	3%	2%	13%
Other	7%	3%	10%	21%
n	*30*	*26*	*50*	*47*

Producers were asked about any marketing difficulties they had experienced, but few responded, preventing publication of their views.

Direct sales

The number of respondents indicating direct to public sales was higher in 2014 at 56 compared to only 38 in 2013. The fall in producers with direct sales in 2013 was thought to be linked to the number of organic producers falling, but the 2014 data opposes this view, though may in part reflect the increase in organic sales as the economy slowly recovers. As in previous years, Table 25 shows that meat continued to be the most widely directly sold product, together with direct vegetable and egg sales.

Table 25 Main type of produce sold (*listed in order of importance in 2014*)

	% of direct sellers		
	2014	2013	2012
Meat	48%	58%	48%
Vegetables	20%	13%	29%
Eggs	14%	11%	8%
Mixed Content	11%	11%	4%
Fruit	5%	0%	6%
Dairy	2%	8%	6%
n	*56*	*38*	*52*

Table 26 indicates the high importance of direct sales to the majority of the producers involved in direct sales. Whilst around a quarter of producers with direct sales did not heavily rely on these sales, over 50% produced 80-100% of their total business turnover from these direct sales (up slightly on 2013 data).

Table 26 Percentage of total business turnover from direct sales

	%		
	2014	2013	2012
0-20%	26%	25%	23%
20-40%	4%	8%	4%
40-60%	11%	11%	6%
60-80%	7%	11%	13%
80-100%	52%	44%	54%

Table 27 indicates that as in previous years, the majority of producers with direct sales were positive about their sales increasing and only 12% have a negative outlook.

Table 27 Direct sales changes during the previous 12 months

	2014	2013	2012	2011	2010
Up by 10%+	11%	12%	20%	12%	7%
Up by 1-10%	24%	18%	13%	16%	14%
No change	54%	62%	50%	55%	67%
Down by 1- 10%	6%	6%	9%	6%	5%
Down by 10%+	6%	3%	8%	12%	7%
n	*54*	*34*	*51*	*58*	*64*

Future intentions of producers

In 2012 and 2013 a considerable number of producers indicated that they intended to de-certify from organic farming, and we have seen a large fall in the number of producers in Wales. As the 2014 survey was being undertaken, producers had applied to the new Glastir Organic scheme but were yet to confirm their involvement, and this is reflected in the results of the survey that indicates around 12% of producers were still unsure if they would remain organic in the next few years. However, 351 respondents (89%) indicated that they were committed to organic farming for 5 or more years.

As part of the survey producers were also asked for their views on whether the current (2014) prices for products were high enough to continue producing organically (shown in Table 28). Beef producers were less positive in 2014, with only 32% of finished producers considering that current prices are high enough compared to 71%, in 2013. Store cattle rearers showed a similar pattern with reduced optimism.

The sheep sector results were very similar between years, with around 20% of finished lamb producers positive, but 61% of producers indicating that the current lamb price wasn't high enough to continue production, identical to 2013. The organic dairy sector was much more positive in 2014 (at time of surveying), with 76% of producers positive about current prices, compared to 36% in 2013, whilst only 12% of milk producers were negative about current prices, compared to 39% in 2013.

2014 egg producer views were very similar to 2013, though slightly more producers were happy with current prices, whilst the small numbers of pig producers responding were more positive than in 2013.

Horticulture producer views were more positive in 2014; whilst arable producers were slightly less positive in 2014, with 31% indicating that they felt current prices were good, compared to only 39% in 2013. Producers undertaking direct organic sales were more positive in 2014, with 70% indicating prices were high enough to continue operating organically.

Table 28 Are current (2014) prices for products sufficiently high to continue producing them organically?

	Definitely		**Probably**		**Not Sure**		**Probably Not**		**Definitely Not**		***2014***	***2013***
	2014	2013	2014	2013	2014	2013	2014	2013	2014	2013	*n*	*n*
Finished cattle	1%	5%	31%	66%	16%	14%	24%	9%	27%	6%	*144*	*169*
Store cattle	0%	2%	33%	57%	21%	17%	20%	17%	26%	7%	*148*	*191*
Finished lamb	1%	0%	19%	17%	19%	23%	25%	29%	36%	32%	*208*	*265*
Store lamb	0%	1%	12%	10%	25%	25%	23%	30%	39%	34%	*115*	*144*
Milk	13%	2%	63%	34%	12%	25%	8%	11%	4%	27%	*52*	*44*
Eggs	6%	0%	56%	50%	13%	27%	13%	14%	13%	9%	*16*	*22*
Pigs	25%	0%	50%	50%	0%	50%	25%	0%	0%	0%	*4*	*6*
Horticulture	13%	7%	50%	41%	13%	21%	19%	17%	6%	14%	*32*	*29*
Arable cropping	5%	2%	26%	37%	45%	43%	17%	4%	7%	13%	*42*	*46*
Direct sales	28%	11%	42%	57%	6%	11%	14%	11%	10%	9%	*50*	*35*
Average (weighted)	4%	2%	30%	37%	19%	21%	21%	20%	26%	19%		

When asked how long they intend to remain as a certified organic producer the 2014 results in Table 29 indicate how the sector has changed over the last three years. The sample size has decreased from 566 in 2012 down to 398 in 2014, but the percentage of producers committed to farming organically for 5 or more years has risen from 8% in 2012 to 83% in 2014. With the launch of Glastir Organic and a number of producers leaving the sector it is now hoped that some stability or even modest growth will follow in the next few years.

Table 29 Length of time producer intends to remain organic

Year	**2014**	**2013**	**2012**	**2011**
<1yr	8%	20%	26%	-
<2yrs	0%	19%	21%	-
3-5 yrs	4%	31%	23%	-
Total of 1-5yrs	12%	71%	70%	42%
5-10 yrs	83%	11%	8%	22%
10yrs plus	6%	19%	22%	36%
n	*398*	*444*	*566*	*561*

Conclusions

The 2014 survey continued to receive an excellent response rate from the telephone only survey method, but results highlighted how the sector has continued to reduce in size over recent years. Whilst a high percentage of producers indicated that they had applied to join the new Glastir Organic scheme, around 16% of respondents had not applied. Within the respondents that had applied there were frequent comments regarding the online only application process, whilst others were concerned at entering a 5 year agreement. Latest Welsh Government information confirms that a number of applicants did not ultimately join the scheme.

However, despite the recent losses within the sector, organic sales remained strong and there was optimism in most sectors, with the beef sector less optimistic due to depressed prices in 2014. As 2015 progresses it is hoped that the sector has now stabilised and there is some potential for increased premiums for beef and lamb, though these are likely to continue to be during periods of supply shortage such as late spring in the lamb sector.

Appendix 1 – Defra Certification Body Data (end of 2013)

		end 2006	end 2007	end 2008	end 2009	end 2010	end 2011	End 2012	End 2013	*% Chg*
Holdings	**Number**	**710**	**857**	**1048**	**1013**	**1006**	**964**	**952**	**786**	-17%
Land use										
Area	**Ha**	**78973**	**95865**	**114393**	**123623**	**121093**	**122718**	**118699**	**100754**	**-15%**
Cereals	Ha	2144	2361	3002	3591	3191	2863	2907	2191	-25%
Other arable	Ha	1557	1618	3164	3428	3317	2638	2116	1590	-25%
Potatoes	Ha	99	96	99	45	38	41	41	5	-88%
Horticulture	Ha	244	322	362	432	379	312	338	274	-19%
Total tillage	**Ha**	4044	4397	6627	7495	6926	5854	5401	4059	-25%
Temp grass	Ha	10564	11286	10125	9904	9474	9662	10074	8946	-11%
Arable land (inc temp grass)	Ha	14608	15683	16752	17399	16399	15517	15475	13004	-16%
Permanent grass/rough grazing	Ha	63103	78976	95961	104024	102464	105517	101214	86255	-15%
Woodland/other	Ha	1262	1206	1679	2200	2229	1684	2010	1494	-26%
Livestock numbers (excluding non-organic stock on organic farms)										
All cattle	**Head**	**41612**	**45096**	**54281**	**49388**	**52040**	**60495**	**56866**	**50238**	**-12%**
Dairy cows	Head	9346	11069	11372	13670	12478	13868	11340	10434	-8%
Est. milk output	M litres	50	61	63	75	69	76	62	57	-8%
Beef cows	Head	8470	8985	12119	9627	11530	14111	13541	11155	-18%
Est. finished cattle	Head	8000	8500	11500	9250	11000	12700	12186.9	10039.5	-18%
All sheep	**Head**	**279361**	**367597**	**531209**	**293930**	**358100**	**531033**	**521905**	**409299**	**-22%**
Ewes	Head	148935	179122	262639	143510	177062	255182	246559	204231	-17%
Lambs/yearlings	Head	129359	185762	266908	148917	179516	273413	271045	200917	-26%
Other sheep	Head	1067	2713	1662	1503	1522	2438	4301	4151	-3%
Poultry	**Head**	**153800**	**120689**	**265647**	**265752**	**252518**	**152296**	**134281**	**201864**	**50%**
Laying hens	Head	45823	28102	57135	51409	38405	38251	25442	26615	5%
Est. eggs	M dozen	1.1	0.7	1.3	1.2	0.9	0.9	0.6	0.6	5%
Table birds	Head (k)	80	84	99	105	105	104	100192	137064	37%
Est. finished chickens	Head (k)	280	293	348	350	350	350	350	350	0%
Other poultry	Head	28059	8837	109112	109676	109446	9651	8647	38185	342%
Sows	Head	16	82	49	338	332	72	99	677	584%
Other pigs	Head	194	649	173	412	359	357	378	393	4%
Goats	Head	35	28	23	17	25	8	27	32	19%
Camelids	Head	318	323	330	215	285	281	272	0	-100%
Horses/donkeys	Head	214	390	447	316	34	93	44	439	898%
Deer	Head	342	426	399	329	348	270	145	193	33%
Other	Head	138	545	632	907	1760	2952	0	11	-