

# An evaluation of the Scottish dairy industry by stakeholders provides a basis for future growth



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*Leading the way in Agriculture and Rural Research, Education and Consulting*

# PROPAGATING INNOVATIONS FOR MORE RESILIENT DAIRY FARMING IN THE ATLANTIC AREA



# Scotland to the Azores

## Atlantic Central area:

- Scotland
- Northern Ireland
- Southern Ireland
- England and Wales
- France (Brittany, Normandy, Pays de la Loire, South West)
- Spain (Basque country and Galicia)
- Portugal (North, South and the Azores)



# Pilot Farmer Network



Country/ Region	Partner	No. Farms
Scotland	SRUC	10
Northern Ireland	CAFRE	10
Southern Ireland	Teagasc	10
England/Wales	AHDB	10
France (Brittany, Normandy, Pays de la Loire, South West)	Idele	20
Basque Country	Neiker	10
Galicia	INGACAL/ CIAM	10
North Portugal	UTAD	10
South Portugal/ Azores	ISA/ Lisbon University	10
<b>Total</b>		<b>100</b>

- 100 pilot farmers
- 8 experimental farms
- Exchanges between farmer groups

# Experimental Farms



**Crichton Royal Farm - Scotland**



**CAFRE Dairy Centre - N. Ireland**



**Kildalton – S. Ireland**



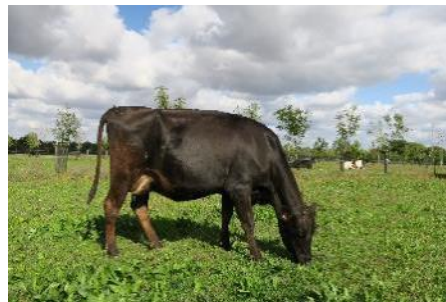
**Duchy College- Cornwall**



**Trévarez – Brittany**



**Blanche Maison - Normandy**



**Oasys-Lusignan –  
New Aquitaine**



**Mabegondo - Galicia**



# Case Study



- Main actors
- Natural environment
- Demography
  - population, unemployment etc.
- Land cover and land use
- Economic, social, environmental and agricultural issues
- Main dairy systems



# Case Study: Southern Scotland UKM9

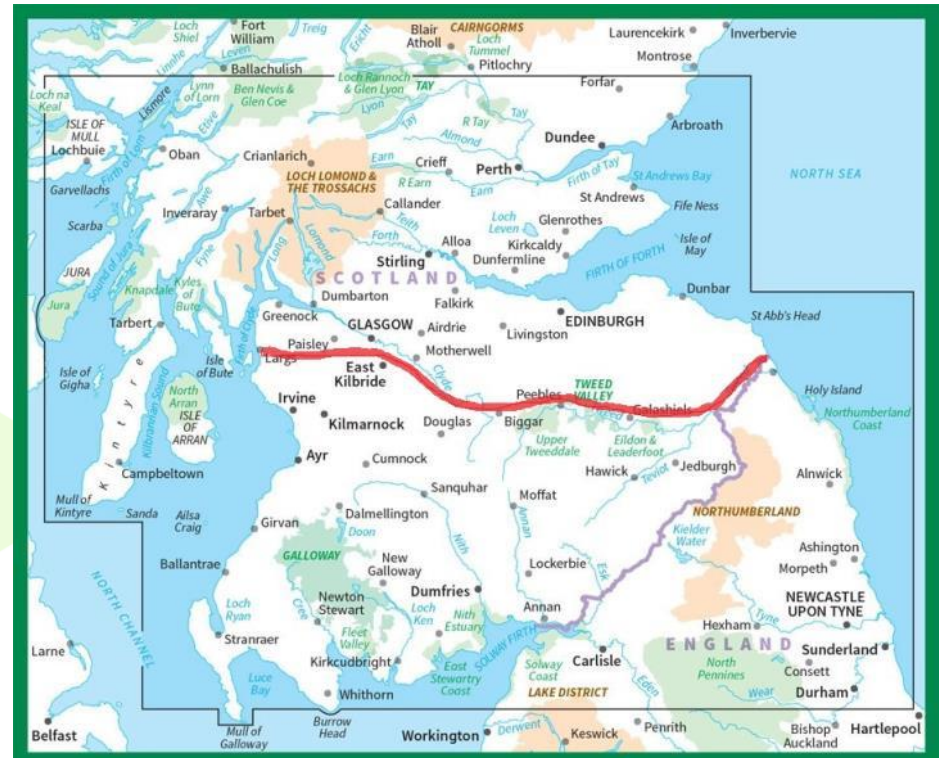


Most dairy heavy area:

~77% of Scottish dairying in region

UKM9 covers:

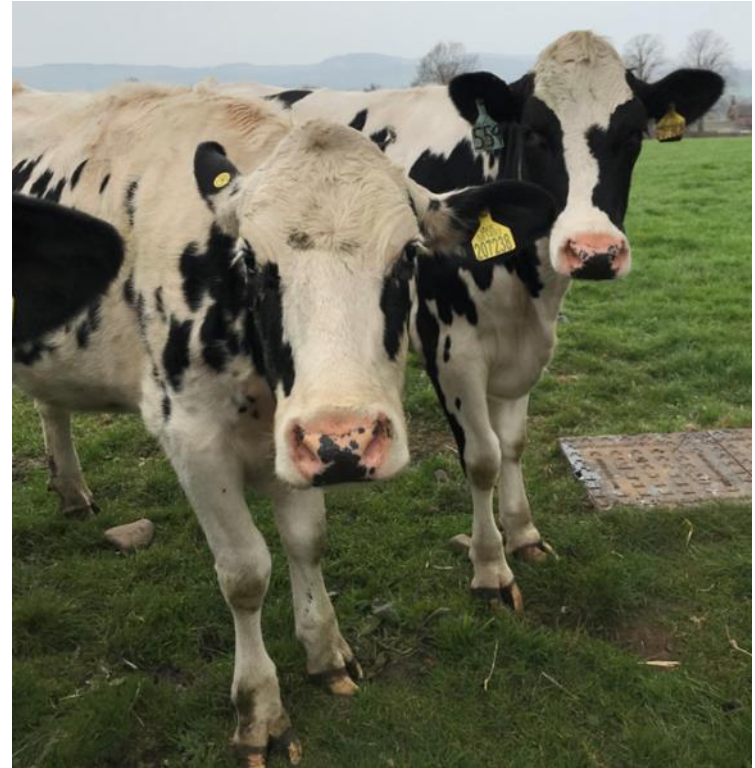
- North Ayrshire
- South Ayrshire
- East Ayrshire
- South Lanarkshire
- Dumfries and Galloway
- The Scottish Borders



# Case Study: Southern Scotland UKM9



- Highest density of dairying
- Grass growing and climate
- Highest number of herds/cows in Ayrshire and Dumfries and Galloway
- Average herd size of 243
- Total number of herds 688
- Total number of dairy cows 138, 839 (total in Scotland 180, 293)





# Case Study: Southern Scotland UKM9



- Population of 945,500 (2014)
- 26% rural
- Average age 46
- 44% tertiary education
- Highest % of gross value added productivity
- Stable employment: above 70% since 2013
- Low long term unemployment (1.2%)
- Range of incomes – Dumfries most diverse



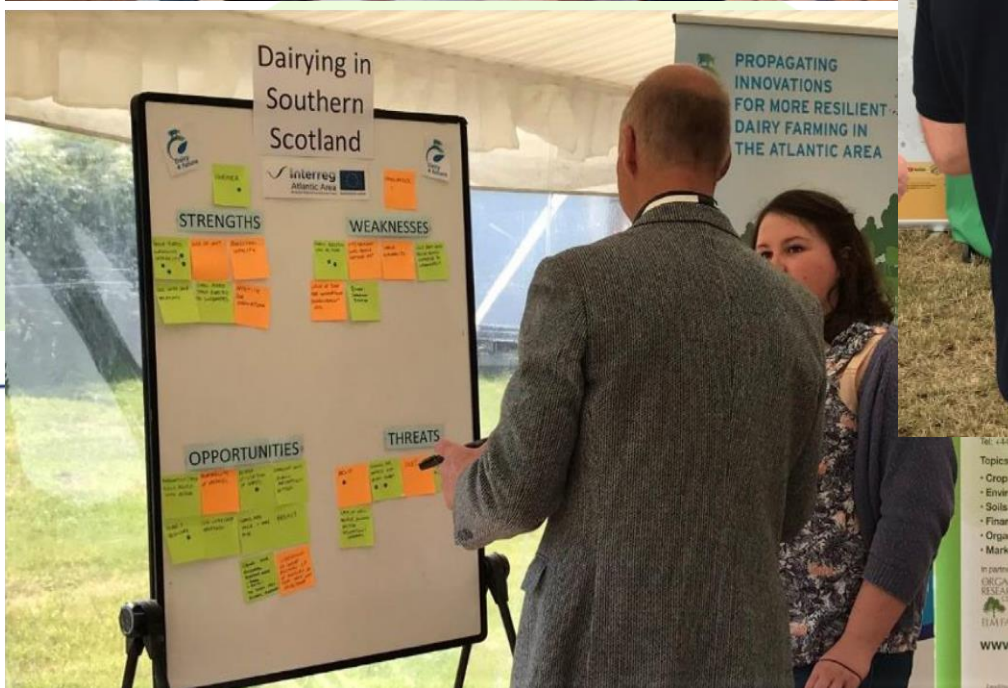
# SWOT – Dairying in Southern Scotland



- Structured interviews +
- Interactive SWOT
- 2 large agricultural events
  - ScotGrass
  - Sustainable Farming Conference
- 150 + participants
- Discussions
- Clear agreement and disagreement
- Wide range of participants







# SWOT: Strengths

1. Climate and good grass growing ability
2. SRUC; research, consulting and education
3. Dairying community and support network
4. Landscape; improves mental health





# SWOT: Weaknesses

1. Supermarkets have too much power
2. Transport poor; particularly further west
3. Lack of people joining the sector
4. Isolation and loneliness; exacerbated by poor signal



# SWOT: Opportunities



1. Better utilisation of grass
2. Farmer adaptability and appetite for innovation
3. Improve image; build on the Scottish brand
4. Cow with calf dairying; perception



# SWOT: Threats



1. Poor public perception
2. Losing the family run dairy farm
3. Labour availability
4. Lack of processors in the area



# Interviews: Positives/Challenges



Category	Description	Indicators
Provisioning	<p>Positive</p> <p>Good quality food is produced in a large quantities to high standards</p>	High standards from regulations and milk contract/supermarket requirements. Farm assurance schemes such as Red Tractor and Arla 360
Provisioning	<p>Challenge</p> <p>Global milk price has a large impact on numbers of farms and cow numbers in Scotland</p>	Loss of farms and cow numbers in response to milk price fluctuation due to global demand
Rural vitality + Socioeconomic	<p>Positive</p> <p>Massive employer in the area, supports rural communities</p>	Large number of companies in local AKIS networks, large number of farms and people employed in dairy
Rural Vitality + Socioeconomic	<p>Challenge</p> <p>Can be difficult to encourage new people into the sector with no agricultural background</p>	Lack of people entering from non-ag backgrounds, perception of poor quality of life, lack of awareness of different range of jobs available



# Interviews: Positives/Challenges

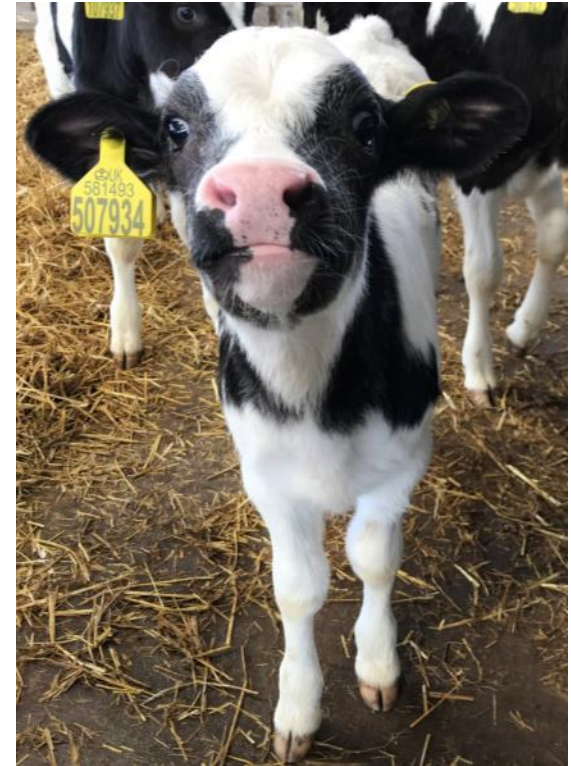


Category	Description	Indicators
Environmental, incl. Animal and Human Health	<p>Positive</p> <p>Farming has created the current landscape we see, there would be no rolling hills and meadows without it</p>	Current landscape, current biodiversity (bees, meadows, woods, hedgerows, birds) and the countryside in general
Environmental, incl. Animal and Human Health	<p>Challenge</p> <p>Dairy is seen as an easy target for the media when considering animal health and welfare and public health; particularly antibiotic resistance</p>	Lots of negative media surrounding the topic of antibiotic use in dairy cattle but little mention of recording and reducing use significantly in the media
Cultural Heritage and Quality of Life	<p>Positive</p> <p>Communities in the area have a long association with dairying and a large number of well attended agricultural shows</p>	Family connections to dairying and farming in general, good attendance by public at agricultural shows
Cultural Heritage and Quality of Life	<p>Challenge</p> <p>Can be a poor quality of life, lack of holidays, unsociable hours, pressure, debt, isolation</p>	High suicide rates in farmers, depression, high numbers of farmers dropping out of the sector

# Next steps?



- Exploitation plan for Dairy-4-Future project
- For Scotland – SWOT results
- Apprenticeship programmes, research areas, discussions with policy makers



# Summary



- Enthusiasm from farmers/stakeholders to be involved and to identify issues
- Common opinions and clear ranking
- Strong positive message of pride in Scottish dairy
- Issues to focus on clear
- Issues are not insurmountable



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Type of participants	No. participants
Farmers	90
Technicians/technical support	15
Agrifood industry	7
Municipalities/local communities and administrations/ government	3
Parks/natural official office	3
Universities/Agricultural Schools	15
NGO	15
Others (precise)	2
<b>TOTAL</b>	<b>150</b>