Country Profile

UNITED KINGDOM

England · Scotland · Wales · Northern Ireland · Access to Land · Land Markets · Generational Renewal

Prepared by: Shared Assets

Published by: Access to Land Network (A2LN), 2025

Note: *The UK is not covered by the JRC Land Market Regulation report (2021) as it was no longer an EU member state at time of publication. Data draw on UK government statistics, Savills, and independent research.*

Sources: DEFRA / gov.uk (Agriculture in the UK 2024); Savills Rural Land Values 2024; Shrubsole, Who Owns England (2019); Scottish Land Commission; Shared Assets, August 2025

16.8M ha	209,000	82 ha	2.9%
Total UAA (69% of UK land)	Farm Holdings (2024)	Average Farm Size	Organic UAA

I. GENERAL AGRICULTURAL CONTEXT

The United Kingdom has one of the most historically entrenched patterns of land ownership inequality in the world — a millennium of feudal accumulation, aristocratic inheritance, and corporate consolidation. Agriculture covers 69% of UK land yet is concentrated in surprisingly few hands. Post-Brexit, the UK has diverged sharply from EU agricultural policy, replacing area-based CAP subsidies with a new "public money for public goods" framework — but with four devolved nations each taking their own path.

Farm Structure — Four-Nation Overview

Indicator	England	Scotland	Wales	N. Ireland
UAA	8.8M ha (2025)	5.6M ha	1.8M ha	1.0M ha
Farm holdings	~96,000	~23,000	~35,000	~25,000
Avg. farm size	~90 ha	~240 ha (incl. crofts)	~50 ha	~40 ha
Owner-occupied (%)	54% owner, 31% mixed	80% farms	~70%	73%
Tenanted / leased (%)	14% wholly tenanted	Significant crofting sector	~30% of land	Minority
Public land ownership	8.5% (all public sector)	Forestry & Crown	NRW & public land	Forest Service NI

Sources: DEFRA June Survey 2025; NISRA Agricultural Census 2024; Scottish Government; Welsh Government

At the UK level: 209,000 farm holdings in 2024, down from 214,000 a decade ago and 268,600 fifty years ago. Nearly half of all farms are under 20 ha — yet average farm size is 82 ha, reflecting extreme size polarisation. Agricultural employment stands at 462,100 (2023), up from 426,000 in 2013, partly due to expanded horticulture and seasonal workforce data.

Land Use Distribution

UK-wide, cereals dominate the cropped area (48% of crop area), followed by temporary grass (21%), other arable crops (12%), oilseeds (5%), uncropped arable (10%), potatoes (2%), and horticulture (2%). Permanent grassland covers 39% of UAA. Livestock farming — particularly beef and sheep — defines upland and pastoral landscapes in Scotland, Wales, and Northern Ireland. Arable agriculture is concentrated in the east of England.

Organic & Agroecological Farming

The UK has one of the lowest organic farming rates in the EU/comparable nations at just 2.9% of UAA — around 498,000 ha across approximately 6,061 farms (2023). This is far below the EU average (around 10%) and well below the targets of peer countries.

Organic Sector	Area (ha)
Permanent pasture incl. rough grazing	307,100 ha
Temporary pasture	91,500 ha
Cereals	50,300 ha
Woodland	17,800 ha
Other arable crops	11,000 ha
Vegetables (incl. potatoes)	10,300 ha
Unutilised & unknown	7,300 ha
Fruit & nuts	2,200 ha
Herbaceous & ornamentals	500 ha
TOTAL (2023)	**~498,000 ha (2.9% of UAA)**

Source: UK Organic Farming Statistics 2023 – DEFRA, May 2024

Permanent pasture and rough grazing dominate organic land (307,100 ha), as in Denmark. True agroecological transition on arable land remains extremely limited. Post-Brexit subsidy reform (ELMS) has in principle created payment pathways for organic and agroecological farming, but uptake barriers and scheme complexity have slowed uptake.

II. FARM SUCCESSION & GENERATIONAL RENEWAL

Age Profile

>65	5%	45.4%	None
Over ⅓ of England farm holders	Farm holders under 35 (England, 2023)	Have identified a successor (Eng/Scot/NI)	National new entrant scheme (UK-wide)

The UK farming population is ageing severely. In England, over a third of all farm holders were above 65 in 2023, while just 5% were under 35. Some 45.4% have identified a potential successor (England, Scotland and Northern Ireland data), suggesting a significant majority of farm businesses face an uncertain transition.

Research suggests the relationship between farm size and succession planning is non-linear: very small farms (<20 ha) and the smallest holdings are less likely to have succession plans — but so are many mid-sized farms relying on a single operator. Larger, more financially viable enterprises are generally better positioned to plan transitions.

Inheritance Tax Reform (2024 Budget)

Agricultural Property Relief (APR) changes from April 2026

- Budget October 2024: the previously unlimited 100% inheritance tax relief on agricultural and business property assets is now capped at £1 million combined.
- Above £1 million, assets will attract 20% inheritance tax (50% of the standard 40% rate), payable over 10 years interest-free.
- The NFU and farming lobby campaigned strongly against this change, claiming it threatens family farm viability.
- However, independent research (University of Warwick/CenTax, 2025) found the reform largely protects genuine family farms — it primarily affects the largest and most asset-wealthy estates, many of which are not primarily agricultural.
- The reform has nonetheless triggered a "wait-and-see" sentiment in the land market, contributing to a 5.1% fall in average English land values in 2025.

Support for New Entrants

There is no national UK-wide scheme for new entrant support. Devolved programmes exist:

- Scotland: Next Generation Practical Training Fund (Lantra Scotland); Land Matching Service; strong policy narrative around new entrant support.
- Wales: Farming Connect / Business Wales farm start-up support.
- Northern Ireland: Farming for the Generations pilot scheme (DAERA, 2024).
- England: No dedicated scheme. New entrant support is provided by civil society organisations including the Landworkers' Alliance New Entrant Support programme and the Royal Countryside Fund.

III. ACCESS TO LAND

Tenure Structure

Tenure arrangements vary significantly across the four nations. In England, 54% of farms are owner-occupied, 31% have mixed tenure (owned + rented), and 14% are wholly tenanted. In Northern Ireland, 73% are owner-occupied; in Scotland, 80% of farms are owner-occupied (though crofting and land reform create a more complex picture); in Wales, approximately 30% of total farmed land is tenanted.

In England, Farm Business Tenancies (FBTs) — introduced in 1995 — account for the majority of the rented sector (44% of rented area, ~1.3 million ha). Full Agricultural Tenancies, which carry stronger tenant protections, have continued to decline, falling to 1.1 million ha (–2.1% in 2024). The shift from FBTs to shorter, less secure lease arrangements is a persistent concern for tenant farmer organisations.

Land Ownership: A Uniquely Opaque and Concentrated Picture

The UK — and England in particular — is notable for the extreme concentration and opacity of its land ownership. Research by Guy Shrubsole (Who Owns England, 2019) and the Who Owns England? project provides the most comprehensive available analysis:

Ownership Category	Est. Share of England
Aristocracy & landed gentry	~30% of England

Ownership Category	Est. Share of England
Private corporations	~18% of England
Oligarchs & city investors	~17% of England
Public sector (incl. MoD, councils)	~8.5% of England
Homeowners (all residential)	~5.5% of England
Royal Family & Crown Estate	~1.4% of England
Church of England	~0.5% of England
Conservation charities (incl. Nat. Trust)	~2% of England
Unregistered / unknown ownership	~17% of England

Source: Shrubsole, Who Owns England (2019); Land Registry data; DEFRA. Note: 17% of England remains unregistered at the Land Registry.

The most striking headline: 1% of the population owns half the land in England. Around 25,000 landowners — typically aristocracy and corporations — control half the country. The top 50 landowners hold approximately 7.3 million acres (12% of UK land area). Scotland is even more concentrated: an estimated 433 people and companies own half of all privately owned rural Scottish land (3.2 million hectares).

Notable Landowners

Indicator	Value / Description
Anders Holch Povlsen (Denmark)	Largest individual UK landowner — 89,000 ha across 12 Scottish estates
Duke of Buccleuch & Queensberry	Richard Scott — one of UK's largest aristocratic estates
Duke of Westminster	Hugh Grosvenor — urban and rural holdings across the UK
Forestry Commission (state)	Largest single landowner — 890,000 ha (Forestry England, FLS, NRW combined)
National Trusts (combined)	~330,000 ha across the UK
Ministry of Defence	Significant landholding — part of the 8.5% public sector share
Crown Estate	~1.4% of England — revenues to Treasury, managed by The Crown

Source: Shared Assets / Shared Assets profile 2025; Countryfile.com 2025; abcfinance.co.uk

Land Prices & Market Trends

UK agricultural land prices have risen approximately 200% over the past 20 years. After a peak in 2024, values fell slightly in 2025, primarily driven by the APR reform announcement:

- England & Wales average (Q4 2025): ~£8,700/acre (~€10,150/acre) — down 5.1% year-on-year from peak ~£9,150–9,350/acre in 2024.
- Northern Ireland: record high £15,202/acre in 2024 — reflecting extreme land scarcity relative to demand.
- South East England (arable): up to £12,000–18,000/acre near the urban fringe.
- Scotland: significant variation from ~£1,000/acre (upland) to £5,000+/acre (prime arable, Lothians).

Key price drivers: proximity to cities; development pressure (housebuilding government priority); carbon offsetting and tree-planting demand; second home and amenity buyers; aristocratic trophy purchases; and the collapse of cheap food imports triggering domestic supply concerns.

Carbon & nature market speculation: an emerging land pressure

- Growing demand for land for carbon credits, biodiversity net gain units, and nature-based solutions is creating new competition with food-producing farmers.
- Large rewilding estates (e.g. Povlsen's Scottish lands) and investment funds are purchasing land for ecosystem services income, often pricing out agricultural buyers.
- Scotland's Land Reform Act 2025 partly addresses this: it requires large landowners to publish land management plans and engage communities before selling.
- In England, there is no equivalent regulatory response — the ELMS scheme rewards ecosystem outcomes but does not regulate who owns the land delivering them.

IV. LAND MARKET REGULATION

England: Minimal Regulatory Framework

England has no equivalent of France's SAFER, Germany's GrdstVG, or Denmark's Agricultural Act restrictions. The land market is almost entirely unregulated:

- No pre-emptive rights for farmers in the sales market.
- No land control authority with powers to approve or reject purchases.
- No restriction on foreign or corporate ownership of agricultural land.
- No maximum land prices or price review mechanisms.
- No mandatory registration of beneficial land ownership (17% of England's land remains unregistered as of 2025).
- Farm Business Tenancies (1995 Agriculture Act) offer minimal tenant security — lengths and terms freely negotiated, often just 1–2 years.
- Compulsory Purchase Orders exist but apply to public infrastructure, not agricultural access or concentration concerns.

The Land Registry has committed to comprehensive registration by 2030 — which would at minimum improve transparency — but enforcement of beneficial ownership disclosure remains weak.

Scotland: Land Reform Act 2025 — A Landmark Shift

Scotland has pursued the most ambitious land reform programme in the UK for decades, culminating in the Land Reform (Scotland) Act 2025 (Royal Assent: 16 December 2025). Key provisions:

- Large Land Holdings (>1,000 ha) must publish publicly available land management plans.
- Community Right to Buy: communities can register interest to purchase large land holdings before open-market sale.
- Lotting powers: Scottish Ministers may require large holdings being sold to be split into smaller lots.
- New Land and Communities Commissioner established to oversee implementation.
- Community engagement obligations: owners of large holdings must consult local communities on management and transfer decisions.

Much of the Act's practical impact depends on secondary legislation yet to be published. It covers land exceeding 1,000 ha individually or through "connected persons" aggregation — designed to prevent circumvention through corporate structures.

Post-Brexit Subsidy Reform (England): ELMS

England's Environmental Land Management Scheme (ELMS), established under the Agriculture Act 2020, replaces CAP direct payments with a "public money for public goods" framework. It operates across three tiers:

- Sustainable Farming Incentive (SFI): broadly accessible actions improving soil health, biodiversity, and water quality — open to most farm types.
- Countryside Stewardship (CS+): enhanced environmental management on top of SFI — habitat creation, landscape restoration.
- Local Nature Recovery (LNR): landscape-scale nature recovery coordinated with local priorities.

CAP Basic Payment Scheme payments are being phased out entirely by 2027. Farmers receiving up to £30,000 BPS saw a 76% cut in 2025; anything above is eliminated. This creates severe income pressure, particularly for mid-scale tenant farmers who lack assets to offset the subsidy loss.

Devolved nations are developing their own frameworks: the Sustainable Agriculture Programme (NI), Sustainable Farming Scheme (Wales), and Rural Payments system (Scotland). Each nation is at a different stage of transition.

V. POLICY & POLITICAL CONTEXT

Key Policy Developments (2024–2025)

Indicator	Value / Description
APR/BPR reform (Oct 2024 Budget)	Cap of £1M combined 100% relief; assets above taxed at 20% from April 2026. Market uncertainty followed.
ELMS phase-in (England)	SFI fully open 2024; BPS phase-out accelerated; full transition by 2027. Mixed uptake.
Land Reform (Scotland) Act 2025	Royal Assent December 2025. Landmark legislation on large land holdings and community rights. Secondary legislation pending.
Housebuilding priority	Labour government's growth agenda targets 1.5M homes; agricultural land reclassification risk increasing.
Sustainable Farming Scheme (Wales)	New agri-environment scheme under development; post-Brexit replacement for CAP in Wales.
Farming for Generations (NI)	Pilot new entrant support programme launched 2024 (DAERA).

Key Organisations

Organisation	Constituency & Position
National Farmers' Union (NFU)	Dominant farming lobby in England & Wales; represents commercial farm businesses and owners; broadly pro-status quo on land markets
NFU Scotland / FUW / UFU	Devolved NFU equivalents in Scotland, Wales, Northern Ireland — similar commercial focus
Tenant Farmers Association	Represents tenant farmers; advocates for security of tenure, fair rents, and stronger landlord obligations
Landworkers' Alliance	Movement of small-scale agroecological farmers,

Organisation	Constituency & Position
	foresters, and land-based workers; progressive land reform advocacy
Country Land & Business Association (CLA)	Represents landowners and rural businesses; opposes land reform measures that reduce owner rights
Shared Assets	Research and advisory organisation supporting commons, community land, and new forms of land stewardship; A2LN partner
Community Land Trust Network	National network of CLTs; supports community-led land and housing; growing rural CLT sector
Land in Our Names	Advocates for land justice for Black, Indigenous, and People of Colour communities in the UK
Right to Roam / Wild Justice	Campaigns for expanded public access to land; intersects with land reform debate
Scottish Land Commission	Independent statutory body advising Scottish Government on land policy and reform implementation

VI. KEY BARRIERS & OPPORTUNITIES

Top Barriers to Land Access

- Land price and capital requirements: quadrupling of prices over 20 years makes purchase unachievable for most new entrants without family capital. £8,700+/acre (~€10,150) is among the highest in Europe.
- Land concentration and opacity: 1% of the population owns half of England; 17% of land is unregistered. New corporate and nature-market buyers operate with no regulatory oversight.
- Regulatory vacuum: England has no pre-emptive rights, no land control authority, no price regulation, and no mandatory ownership transparency. The market is effectively ungoverned.
- Insecure tenancy: Farm Business Tenancies (often just 1–3 years) prevent long-term investment and planning for tenant farmers and new entrants.
- Complexity and inaccessibility: planning, legal, and financing processes are intimidating for new entrants without farming family backgrounds or established professional networks.

Opportunities for Change

- Scotland's Land Reform Act 2025: a model for England — community rights, large holding lotting, and management plan requirements represent significant innovations that could be extended south of the border.
- Community Land Trusts and community buyouts: a growing sector in England and Scotland; CLTs offer a permanent, non-speculative model for land access that removes land from the market indefinitely.
- "Public money for public goods" (ELMS): properly designed, the shift away from area payments toward ecosystem outcomes could rebalance competitive advantage toward smaller, agroecological, and new entrant farmers.
- Inheritance tax reform: if APR changes genuinely redistribute farm assets from financial investors to active farmers, they could improve access — though the evidence is still emerging.
- Growing regenerative farming movement: consumer demand, investor interest, and policy alignment around nature-positive farming creates commercial and political momentum for agroecological transition.
- Community wealth building and enterprise stacking: new entrants using creative business models (farm/tourism/energy combinations on small plots) can make marginal land economically viable.

VII. ADVOCACY & ALLIANCE PRIORITIES

Shared Assets — Approach

Shared Assets is primarily a research and advisory organisation rather than a campaigning body. It supports the broader UK land justice movement through knowledge generation, capacity building, and international exchange, and connects civil society actors across the movement ecology.

- Supporting the broader land justice movement (Landworkers' Alliance, Land in Our Names, Community Land Trust Network, Right to Roam, Social Farms & Gardens).
- Research and advisory work on commons, community land stewardship, and new models of land governance.
- A2LN engagement as the primary international alliance — bringing UK experiences to European platform and EU-level advocacy.

Strategic Warning: Right-Wing Capture of Farmer Discontent

A2LN-relevant risk: the far-right farming narrative

- Shared Assets identifies as a significant risk the trend of far-right political movements targeting farmers as a receptive audience — exploiting economic anxiety, generational decline, and distrust of regulatory change.
- In Germany, France, and the UK, protest movements have been partly captured or exploited by nationalist and populist forces.
- The question for A2LN and its member organisations: how do we support farmers experiencing genuine hardship without ceding that space to actors whose broader agenda is harmful?
- Building robust agroecological and land justice narratives that speak to farmer economic concerns — not just environmental goals — is a strategic priority.

EU-Level Context (Post-Brexit)

The UK is no longer subject to EU agricultural or land policy. However:

- UK-EU trade dynamics (food standards, import competition) directly affect farm viability and land market pressures.
- The Mercosur and other trade agreement debates have UK parallels — cheap food imports driving domestic intensification or exit from farming.
- Scotland's Land Reform Act 2025 is being closely watched by land reform advocates across Europe as a potential model.
- Shared Assets and the Landworkers' Alliance maintain international connections through A2LN and La Via Campesina, keeping UK experience relevant to EU-level advocacy.

VIII. KEY SOURCES

DEFRA — Agriculture in the United Kingdom 2024 (gov.uk/government/statistics/agriculture-in-the-united-kingdom-2024)

DEFRA — Agricultural Land Use in the United Kingdom at 1 June 2025 (gov.uk)

DEFRA — UK Organic Farming Statistics 2023 (gov.uk, May 2024)

Savills — Rural Land Values 2024 (savills.co.uk/landing-pages/rural-land-values.aspx)

Landlister.co.uk — UK Agricultural Land Values 2024–2025 Regional Price Map (March 2026)

Guy Shrubsole — Who Owns England? (William Collins, 2019); whoownsengland.org

Scottish Land Commission — Land Reform (Scotland) Act 2025 summary (landcommission.gov.scot)

Scottish Land Commission — Why land reform matters more than ever: 2025 (December 2025)

University of Warwick / CenTax — IHT reform and family farms research (2025)

Sustain — Farming budget, IHT and ELMS analysis (sustainweb.org, November 2024)

NISRA — NI Agricultural Census 2024 (datavis.nisra.gov.uk)

Shared Assets — Country Profile submission (August 2025)