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Farming on the edge:

new insights into farming in the urban edge

Executive summary

The urban fringe is the countryside next door to at least 30 million people living in towns and cities[i]. The farmland within the urban fringe has rich potential to generate multiple social, environmental and economic benefits. In practice, it is often targeted for the expansion of towns and cities, new transport hubs and routes, utilities, business zones and housing. Much urban fringe land is designated as Green Belt, although protection from development is frequently contested.

Within this context, farming on the urban edge is sidelined, and such farmland is often underrated and overlooked. But the data we present here leads us to argue that urban fringe farming is essential for the UK's food security. In 2021, urban fringe farms:

1. produced enough to feed 7.2 million people over 61% of all their food needs, supplying 20% or more of key UK cereals including wheat, barley and oats, and around 10% or more of other major food supplies including fresh vegetables, potatoes, milk, eggs and meat;
2. generated over £3 billion by sales value (turnover) in food supply. We argue that the land quality and the amount and value of food urban fringe farming produces, make it increasingly important in a volatile and rapidly changing world.

Despite its evident value, we are losing substantial elements of farming capacity:

1. the farmed area of the urban fringe has fallen by 3% in the decade to 2021 - in contrast to England's national farmed area which has increased - and over 80% of this loss has occurred in the Green Belt.
2. The number of farm holdings is down nearly 6.6% - compared to a smaller national decline of 0.2% - with most of these losses also occurring in the Green Belt.
3. There have been losses in a wide range of farm sizes and types. Very small farm holdings (below 5 ha) have increased across the country, but all other farm sizes have dropped in number. There are significant identified falls in dairy farms (34%) and specialist horticulture (27%) in the urban fringe, which is particularly concerning for UK food security.

In our recommendations, we call for the government to introduce its new land use framework as soon as possible. Both the LUF and national planning policies should address the specific challenges farming faces in urban fringe areas and promote the clear opportunities offered by urban fringe farming to increase fresh local supplies; and provide additional benefits such as access, education and support for the environment.

As a result of these findings, CPRE has set out the following recommendations for government in the report:

1. Introduce the proposed Land Use Framework (LUF), following the consultation opened in January 2025, as soon as possible and include policies to:

- Provide strategic oversight of the total land available and needed for a secure supply of food under sustainable land management.
- Identify urban fringe areas as priorities for supporting nature and sustainable land management.
- Update the evidence on the location and productive properties of farmland through the Agricultural Land Classification system and strengthen policy protections for high-quality land.
- Encourage local authorities, through strategic land use plans, to bring forward new models for large-scale landscape enhancement in urban fringe countryside that does not already benefit from being part of a national or regional park or National Landscape.

2. The government should use environmental land management schemes (ELM) in the Farming and Countryside Programme to:

- Offer and promote a targeted package of actions within the Sustainable Farming Incentive (SFI) for urban fringe farming to accelerate the transition to sustainable farming and increase wider public benefits.
- Within the wider programme target to cover 70% of all utilisable farmland by ELM schemes, there should be a target to achieve 70% coverage across urban fringe agricultural land, as an area where such investments would achieve particularly high public benefit.
- Provide an attractive small farm package of bundled-up actions to make SFI easy to enter for nature-friendly smallholdings, especially market gardens and community supported farms.

3. The government should further revise national planning policies and guidance to:

- protect, support and encourage sustainable nature-friendly farming enterprises in the Green Belt and wider urban fringe for their contribution to sustainable development; and
- Provide stronger protection for farmland, particularly high-quality farmland

4. The government should extend the scope of annual June farming surveys to provide specific analysis of trends in urban fringe areas, and of farmer and other land manager behaviour and decision making so improving the evidence base to better target policy, delivery of policy and value for money of spend.

5. Encourage sustainable, small-scale agriculture in the countryside around towns, and particularly the increased production of food for local markets.

1. Introduction: England's urban fringe and its farms

Multiple demands are made on England's urban fringe, and land use within it is highly contested. In this context, farms can struggle to compete. However, we argue that greater support for farming in the urban fringe is a key part of making best use of this land in our increasingly urgent context of mitigating and adapting to climate change, restoring nature and improving public health and wellbeing.

Land around our towns and cities, on the urban edge, can face immense pressures for change: from development for housing and industrial sites to cutting through land for roads, railways and busways, pylons and other energy infrastructure. Speculation drives up land values. Developers buy land or its rights, and proximity to urban areas mean developments such as golf courses, horse stabling and riding, as well as other amenities, are attractive options. In this mix, farming land to produce food - the main use of rural land in England - can struggle to compete.

The-urban fringe debate focuses on the Green Belt – land protected in planning law and policy, with the aims of preventing urban sprawl and keeping land around towns and cities permanently 'open' or free of built development. The Green Belt is highly contested, and its integrity and purposes are under threat as it is 'nibbled away' bit by bit for individual developments. Recent changes to the national planning policy framework (NPPF) introduced in December 2024 raise questions as to whether working farms within the Green Belt could be redefined as 'grey belt', thereby increasing the possibility of them being developed for housing. CPRE has previously reported extensively about development of Green Belt[ii]., The wider countryside and nature NGO movement has called for a long-term strategic vision for the Green Belt that would maximise its potential to solve complex problems for people, nature and climate, including contributing to a secure food supply[iii].

In this report, we make the case for the relevance and value of farming on the urban fringe as a key part of this vision for maximising the potential of the Green Belt and other areas of the urban fringe and making best use of our finite land supply. We analyse data from the Defra June Census of Agriculture covering 2010 and 2021 which covers total farm holdings, total farmed area, farm types, farm size bands and the total number of livestock for commercial holdings in Green Belt and comparator areas, and for England overall (see Section 6: Methodology).

About the urban fringe and its farms

Defining the urban fringe

We define the urban fringe as Green Belt and Comparator Areas. This covers 22% of England, or just under 3 million hectares. England has 14 Green Belts, with the largest ones surrounding the country's largest urban areas including London, the West Midlands, Greater Manchester, Leeds and Newcastle. They are areas of land around towns and cities protected in planning policy, to remain permanently open or undeveloped land to prevent the unrestricted sprawl of these large urban areas.[iv]

Comparator Areas (CAs) are an analytical construct used for comparing the land use qualities of land in the urban fringe with and without a Green Belt planning designation. They follow a Natural England description as areas within 5km of the urban edge and around all urban areas over 100,000 people[v] that are not covered by existing Green Belts. Comparator Areas are found around cities such as Leicester, Hull, Norwich, Swindon and Plymouth.

How green is the urban fringe?

Demand for land use change on the urban edge leads some to call its 'greenness' into question, partly to justify developing it. Although land very close to the urban edge can be disturbed by other land uses, acre for acre urban fringe land in England is as farmed[vi] and, as green, if not greener, in terms of natural and semi-natural land use than England as a whole. There is within England's urban fringe:

- one-third of broad-leaved and mixed woodland (32%)
- over a third of standing open water (35%)
- over a fifth of conifer woodland (23%)
- a relatively low, albeit still significant, proportion of mountain, heath and bog (17%).

Urban fringe farming

Urban fringe land is broadly representative of farming in England with farms of all types, especially arable, dairy and grazing livestock but fewer specialist poultry and pig farms. It includes 21% of England's total farmed area but nearly a quarter (over 25,000) of England's farm holdings.[vii] There are more farms per hectare and of more diverse sizes than elsewhere.

For the purposes of Chapter 2 (food supply), we have presented the figures from England's urban fringe areas within the wider UK as well as England context, to demonstrate that the resource of urban fringe farmland is significant for the entire UK. Our analysis shows that:

- The urban fringe has the capacity to feed the equivalent of 7.2 million people over three-fifths (61%) of all their food needs; or three-quarters of the food they eat (74%) that can be produced in the UK.
- Urban fringe areas, we estimate, generated over £3.3 billion by sales value (turnover) in food supply in 2021 (£4 billion at 2023 prices).
- Of all new food supplied in the UK (2021 data) England's urban fringe farms supplied 20% or more of all UK cereals (wheat, oats and barley), 9 to 15% of other major foodstuffs - fresh vegetables, potatoes and milk, eggs and all types of meat – poultry, pig meat, beef and sheep meat.
- The quality of land and soils in the urban fringe is equal to other farmed areas in England, but in UK terms, it is especially valuable for growing crops – it contains 11% of UK farmland but 18% of all UK croplands.

2. England's urban fringe farms are essential for a secure food supply in the wider UK

Urban fringe farmland makes a significant contribution to the overall UK food supply, providing 20% of all cereals and around 10% or more of many major food groups. Although urban fringe land can often appear scruffy or neglected, beneath the surface the soil quality is disproportionately good relative to the rest of the UK, and it is essential not to dismiss this potential. We must instead support current farmers and encourage new farming initiatives to bolster food production in these areas and contribute to UK food security.

2.1. Number of people fed

The most basic analysis of urban fringe land shows it makes up 21% of the national farmed area of England or, extending this to the UK's 17.436 million hectares (ha) of farmed land area, then 10.7%[viii].

If urban fringe farmland is used productively then in broad terms this land could provide food equivalent in value to over three-fifths of the food needs of 7.24 million people. This is based on the UK production-to-supply ratio for 2021[ix] - referred to as the government's self-sufficiency index. This was 61% for all food types and 74% for all food types that could be produced domestically.[x]

More detail on what elements of England's current food production are taking place in urban fringe areas follows in section 2.2 below.

2.2. Quantity and value of food produced

Our analysis considers levels of UK domestic production as a percentage of total supply for major foodstuffs produced. On this basis, we estimate that as a proportion of the new food supply in the UK urban fringe areas provides:

1. Over 20% of all cereals – wheat, barley and oats – for milling flours, brewing and distilling and animal feed.
2. From 9% to 15% of multiple major foods including pigmeat (9.3%), poultry (9.8%), mutton and lamb (9.9%), eggs (10.4%), beef (11.4%), fresh vegetables (11.5%), dairy (liquid milk 13.3%), potatoes (14.3%), and sugar beet (14.6%).
3. Fresh fruit produced in the urban fringe is much lower (3.4%); this reflects the small contribution domestic production makes overall to UK fresh supply of fruit which relies mainly on imports.

The overall value of turnover – based on government data on production value and using an estimated urban fringe share of production – was £3.341 billion of a total of £23,506 billion for UK farm production of these main commodity foods in 2021.[xi] By accounting for food price inflation to 2023 this value increases to £4.052 billion at nearer to current prices.

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Table 1 - Analysis of food produced in the urban fringe

Farm type	Food product	Estimated urban fringe farming output as % of England production %	Estimate of urban fringe quantity output by unit (Ktonnes (unless specified otherwise)	Estimate of urban fringe value of output (million £ 2021 prices)	Estimate of urban fringe value of output (million £ 2023 prices)	Est. England output as % of total UK new supply	Est. urban fringe output as % as of total UK new supply
Cereals	Wheat	25.6%	3,311	640.3	689.2	89%	21.1%
	Barley	25.6%	1,265	216.6	234.2	78.1%	20%
	Oats	25.6%	229	30.1	41.7	80.3%	20.6%
	Oilseed rape (OSR)	25.6%	200.1	100	97.3	41.6%	10.7%
	Field beans and peas	25.6%	224.4	51.2	51.2	No data	No data
General cropping	Potatoes	25.7%	988	144.1	230.1	55.5%	14.3%
	Sugar beet	25.7%	1,073	48.6	63.1	56.7%	14.6%
	Fresh vegetables	24.3%	512.8	375.30	503.8	44.6%	11.5%
Horti-culture	Fresh fruit	24.3%	no data	207.6	236.3	13.9%	3.4%
Specialist pigs	Pig meat	12%	95	140	206.8	56.5%	9.3%
Specialist poultry	Poultry	12%	202	308	372.2	81.3%	9.8%
	Eggs	12%	73.8 million dozen	60	90.4	56.5%	10.4%
Dairy	Milk	19%	1,641 million litres	514	652.4	59.6%	13.3%
Grazing livestock (lowland)	Beef	19%	98	366	439.1	47.1%	11.4%
Grazing livestock (LFA)	Lamb and mutton	15%	27	144	144	47.9%	9.9%
Total £mn				3341	4052		

2.3.Quality of urban fringe soils for food growing

Our understanding of land, its soil quality, and what land is best to grow food crops on in England comes from the Agricultural Land Classification (ALC) system – a long-standing science-based model which classes land based on the potential to produce a range of crops with high yields on a regular basis.

Urban fringe areas have proportions of the highest quality land In England for cropping in the higher grades 1 to 3 that broadly correspond to the proportion of England's overall land area that is in the urban fringe:

19% of grade 1 land – the highest grade and relatively rare (just 2.7% of all farmland in England) – is in urban fringe areas, with London and the North West Green Belt areas significant nationally (totalling 67,866 ha: 41,758 ha in Green Belt and 26,108 ha in CAs of 354,644 ha in England).

23% is rated grade 2 (219,943 ha in GB and 207,981ha in CA of 1,849,258 ha nationally).

Soil quality depends on long-term aspects such as the underlying rock, stoniness of soil, weather and risk of drought or wetness, not how well land is looked after.[xii] The quality can only be permanently degraded if the topsoil is taken away or badly contaminated, for example, with heavy metals. [xiii]This means that good farmland on urban fringes that is left uncropped or otherwise looks run down, will likely retain valuable potential to produce food. This higher quality land is deserving of greater protection where development pressure, as in urban fringe areas, is higher and where the stripping, capping and sealing of the soils can permanently end their value for producing food as well as degrade many other benefits soil provides.

2.4.Urban fringe land is highly significant in UK terms

Urban fringe land has similar soil quality to other farmland in England but, in the UK context, it has greater relative value: land quality is better in England for crops than the other three UK nations where grasslands dominate. Demonstrating this using soil quality data is difficult as soil grading systems vary across the UK and detailed up-to-date grading data is not widely available. As a proxy for land quality, we have analysed instead cropped areas in each country as a share of overall farmed area from June Agricultural Census results for 2021. By amalgamating the results across the UK and comparing this to the urban fringe we arrive at an initial estimate of the relative importance of urban fringe land to UK land in general for growing crops.

As Table 2 shows, cropland is relatively scarce in the four nations apart from England, where nearly half of farmland is under crops. As we know soil quality (as measured by the ALC mapping) in the urban fringe is similar to England as a whole and high shares of cereals and other crops are produced there (according to farm holding and farm type data). On this basis, we estimate the urban fringe area is much more important for crop production than its overall share of UK land: representing nearly 18% of all croplands for around 11% of the UK's farmed land area. Given that the best land will normally be used for crops to get the best return and highest reliable yields, this confirms that urban fringe farmland is, at more than one-sixth of the UK's crop growing area, hugely important for the UK's domestic food supply.

Table 2 - Analysis of UK crop area (all areas shown in hectares) by nation (2021 data)

Nation	Total farmed area on holdings	Total crops and bare fallow	% of farmed area under crops/ fallow	Source/ Notes
England	8,975,549	4107 369	45.8%	England June 2021 Farm census data[xiv]
Wales	1,783,894	96751	5.4%	Wales June Farm Census data 2021 [xv]
Scotland	5,641,802	588,802	10.4%	Scotland June 2021 Farm census data[xvi]
Northern Ireland	1,035,642	46461	4.5%	Northern Ireland June 2021 Farm census data [xvii]
UK total	17,436,887	4,839,383	27.8%	For reference see Defra et al. Agriculture in the UK 2022. Table 2.1 (Total crops and Uncropped arable land figures)
England urban fringe	1,866,167	857,704	45.8%	See Chart 1 below
England urban fringe area as proportion of UK	10.7%	17.7%		

3. Trends in urban fringe farming

The amount of land used for farming in urban fringe areas is decreasing, with much of this loss occurring in the Green Belt. At the same time smallholdings have been increasing in number, with the potential to increase diversity and positively impact the urban fringe farming landscape. Overall, however, there is still much we do not understand about the reasons for these changes, and further research and support is needed to ensure that urban fringe farming is protected and able to thrive.

3.1. Urban fringe farmland is decreasing

The farmed area of England increased by 1% during the 2010s, but the urban fringe farmed area fell by 3%, or over 56,000ha (560 km2), an area equivalent to a city the size of Leeds, with much of this (45,000ha) reduction taking place in the designated Green Belt.

Table 3: Agricultural land area change 2010-2021

	2010		2021		2010 - 2021	2010 - 2021
Area	Total hectares	% of England totals	Total hectares	% of England totals	Area change hectares	% change
Green Belt	1,037,613	12%	992,539	11%	-45,074	-4%
Comparator Areas	884,836	10%	873,628	10%	-11,208	-1.3%
Urban fringe total	1,922,449	22% [xviii]	1,866,167	21% [xix]	-56,282	-2.9%
England	8,887,294	100%	8,975,549	100	+88,255	+1%

Source: Defra Survey of Agriculture and Horticulture - June 2010 & June 2021

3.2. The number of farm holdings is decreasing

There has been a worrying decrease of nearly 7% in the number of urban fringe farm holdings since 2010. The overall figure masks the difference between Green Belt and other urban fringe holdings with Green Belt faring comparatively badly. In relation to England overall, this supports the view that there is greater pressure on urban fringe holdings. Further analysis of the size and type of holdings follows in sections 3.3 to 3.5.

Table 4: Change in number of farm holdings

	2010		2021		2010 - 2021	2010-2021
Area	No of holdings	% of England totals	No of holdings	% of England totals	No of holdings change	% of holdings change
Green Belt	15,530	15%	14,416	14%	-1,114	-7.2%
Comparator Areas	11,247	11%	10,595	10%	-652	5.7%
Peri-urban total	26,777	25%[xx]	25,011	24%	-1,766	-6.6%
England	105,449	100%	105,220	100%	-229	-0.2%

3.3. There are more small and very small farm holdings in the Green Belt

There are a broadly similar number of large farms (above 100ha) in the urban fringe area as in all land nationally. Small to medium-sized farms (those below 100ha) are more present in Green Belt areas than other countryside, including Comparator Areas (CAs). This suggests that Green Belts, rather than an urban fringe location on its own, have an influence in supporting small and medium-sized enterprise (SME) farm businesses, although it is unclear why this is the case from currently available data.

Green Belt designations surround our largest towns and cities, as mentioned in the introduction. Such locations could therefore provide an advantage for farm viability if businesses are able to tap into many potential customers. This is especially the case if farms have diversified into selling produce directly or providing services such as stabling. In such cases, consolidation into larger units may be less necessary or desirable.

Table 5 - Farm holding sizes 2021– number of holdings and % of national totals

[Note: the labels such as 'very small' 'small' etc. are CPRE descriptions for the purposes of this report and not used in official statistics.]

Farm holding size:	<5ha very small	5<20ha Small	20<50ha Lower medium	50<100 ha Upper medium	>=100ha Large	Totals
Green Belt	2,103	4,253	3,139	2,171	2,750	14,416
%	13%	16%	15%	13%	11%	
Comparator Area	1,450	2,809	2,239	1,687	2,410	10,595
%	9%	10%	11%	10%	10%	
Total urban fringe farming area	3,553	7,062	5,378	3,858	5,160	25,011
%	22.3%	26%	26.2%	23%	20.7%	23.8%
National	15,941	27,112	20,494	16,791	24,882	105,220

Source: Defra Survey of Agriculture and Horticulture - June 2010 & June 2021

3.4. Huge increase in the number of smaller farm holdings and loss of larger farms

Although numbers of urban fringe farms have declined in recent decades – with the biggest losses noted in small to medium-sized farms - this fall has now stabilised. Despite an overall rate of decline, very small farms have bucked the trend, rising in numbers more recently, reflecting a similar rise in national figures. Frustratingly, we lack a clear explanation for the statistical data, which makes it difficult to target support for the farms that need it most.

Table 4 shows change in holding numbers for each size category from 2010 to 2021 for urban fringe areas compared to national figures.

Analysis shows:

- The overall decline in farm numbers in earlier decades stabilised in the 2010s. [xxi]
- The largest decline can be seen in the number of small and medium farm sizes; in contrast, very small farms below 5ha have seen a marked increase compared to a huge decline from 1990 to 2007[xxii].
- Changes in very small and large farms in urban fringe areas reflect national trends, but changes in small and medium-sized farms in the urban fringe areas are more pronounced than national trends by 5-9%.

Explaining the dramatic increase in very small farms is not straightforward. New businesses, for example, 'micro farms'[xxiii], could be forming as SME farms are broken up or sell land. It could reflect the economic

difficulties of medium-sized farms: they are too large to adapt to niche markets alone but too small to compete on economies of scale selling into commodity markets, where margins can be wafer thin. The fall in the largest farms may be surprising but not so if it reflects increased merging of farms as other data indicates, with each farm on average managing more land: despite falls in overall numbers over 100ha, the area covered by these farms has increased by 330,000ha from 2010 to 2021[xxiv]. This could also be happening in urban fringe areas (perhaps further out from the urban edge) as the difference from national falls is small. However, since the uptick in very small farm holding numbers in urban fringe areas is like that nationally, the net loss of over 1,700 urban fringe farms remains unexplained.

The government statistical data we have also reveals what we lack: any explanation as to why such changes are occurring and what the drivers are. This absence of explanation means the statistics are much less useful in shaping policy and guiding targeted support to the farms and areas which may need it most.

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Table 6 - Change in farm holding size (2010-2021)

	<5ha Very small	5<20ha Small	20<50ha Lower medium	50<100ha Upper medium	>=100ha Large	Totals
Green Belt 2010	1,242	4,992	3,734	2,646	2,916	15,530
Green Belt 2021	2,103	4,253	3,139	2,171	2,750	14,416
Number change	+861	-739	-585	-475	-166	-1114
% change	+69%	-14.8%	-15.7%	-18%	-5.7%	-7.2%
Comparator Area 2010	814	3,242	2,545	2,035	2,611	11,247
Comparator Area 2021	1,450	2,809	2,239	1,687	2,410	10,595
Number change	+636	-433	-306	-348	-201	-652
Number and % change	+78%	-13.36%	-12.02%	-17.1%	-7.7%	-5.8%
Total for urban fringe farming area 2010	2,056	8,234	6,279	4,681	5,527	26,777
Total for urban fringe farming area 2021	3,553	7,062	5,378	3,858	5,160	25,011
Number change	+1,497	-1,172	-901	-823	-367	-1,766
% change	+72.81 %	-14.23%	-14.35%	-17.58%	-6.64%	-6.6%
National 2010	9,182	28,693	22,243	19,072	26,259	105,449
National 2021	15,941	27,112	20,494	16,791	24,882	105,220
Number change	+6,759	-1,581	-1,749	-2,281	-1,377	-229
% change	+73.61%	-5.51%	-7.86%	-11.96	-5.24	-0.2%
Difference between national and urban fringe farming (% points)	-0.8	-8.72	-6.49	-5.62	-1.4	-6.38

3.5. High proportions of horticultural, livestock and mixed farms are being lost in urban fringe areas

Between 2010 and 2021, there were large changes in the types of production farms specialised in across England, with general cropping seeing one of the biggest increases (up 22%) and dairy the largest decrease (down 29.2%). Overall, these (national) changes are reflected in the urban fringe, but there were bigger losses for each falling farm type, particularly cereals, grazing livestock and horticulture, and smaller increases. For specialist pigs, there was a loss of urban fringe farms against a national trend of increasing number of holdings overall.

Table 5 compares farm types by number of holdings for Green Belt, Comparator Areas, urban fringe areas overall and nationally for 2010 and 2021. We have also analysed change in holding type over this period in absolute numbers and percentages. [xxv]

Table 7 – Farm types (by number of holdings) for combined urban fringe areas and change compared to national numbers [xxvi]

Farm type	Urban fringe farming	Urban fringe farming	No. change	% change	National (England)	National (England)	No. change	% change
	2010	2021			2010	2021		
Cereals	4,378	4,216	-162	-3.7%	16,837	16,468	-369	-2.2%
General Cropping	4,462	5,223	761	+17.1%	16,663	20,327	+3,664	+22%
Horticulture	1,220	893	-327	-26.8%	4,602	3,677	-925	-20.1%
Specialist pigs	360	291	-69	-19.2%	1,601	1,772	+171	+10.7%
Specialist poultry	418	457	+39	+9.3%	2,113	2,485	+372	+17.6%
Dairy	1,871	1,242	-629	-33.6%	7,882	5,580	-2,302	-29.2%
Grazing livestock (LFA)	2,752	2,517	-235	- 8.5%	12,625	12,233	-392	-3.1%
Grazing livestock (lowland)	8,883	7,747	-1,136	-12.8%	33,391	31,987	-1,404	-4.2%
Mixed	2,113	1,713	-400	-18.9%	8,320	7,187	-1,133/ -13.6%	-13.6%
Other/non-classifiable	321	712	+391	+121.8%	1,385	3,604	+2,219	+160.2 %
Totals	26,778	25,011	-1,767	- 6.6%	105,419	105,320	-99	--0.1%

National trends are mostly reflected in urban fringe areas but with generally more intense decreases, and subdued increases. This reflects a fall in urban fringe farms overall, with similar shifts from farming to general cropping and 'Other' non-classifiable types observed both in the urban fringe and nationally.

Numbers of dairy, horticulture and mixed farms have fallen dramatically since 2010, both nationally and in the urban fringe. Dairy farms are down nearly a third nationally and horticulture holdings down a fifth. Mixed farms also fell by 14%. This decline was notably greater in urban fringe areas, reflected in falling numbers of urban fringe farms more generally, as seen in Table 5.

There are marked trends in the data for some farm types explored further below:

i) Farms in the Other category – that do not fit into the other types, or holdings with buildings or fallow land and other areas only - more than doubled in the urban fringe suggesting farms are moving out of producing food for other more profitable businesses, though this trend is more pronounced nationally. This suggests that farmers producing food in urban fringe areas may be doing better in urban fringe areas, perhaps due to better local markets with access to large populations.

ii) General cropping - farms producing a mixture of arable crops including field scale vegetables - the increase in these farms could mean farmers are becoming less specialised and raising a wider range of crops. This broader rotation can be beneficial for soil health and pest management and may also indicate a shift to more agroecological or regenerative forms of farming. The move away from mixed farming is sizeable though and suggests more specialisation on other farms. General cropping farms also grow the bulk of UK vegetables. Yet, while the number of general cropping farms has gone up in the urban fringe and in England, the total area under vegetables in the UK and output has fallen. This suggests vegetables are uneconomic to produce on current margins and in the face of import competition. Research for Sustain confirms very low profit margins for growers of apples and carrots of 1% or much less. [xxvii] Smaller scale market gardens are facing very tough times and so their numbers may be falling. For context, the wider figures for vegetable production in the UK are shown in the box below.

iii) Specialist pig farms - The biggest difference between urban fringe areas and the national trend can be seen in the number of specialist pig farms, where numbers have dropped by a fifth in the urban fringe, but have risen by 11% in England nationally, resulting in a 30% difference between the two. We can speculate this may be due to larger pig units or open-air operations being harder to operate in areas nearer to towns and cities.

iv) Horticulture - While there has been a dramatic fall in numbers of dairy farms, this has been compensated for by growth in average herd size and larger intensive units, which has kept up milk production overall nationally. Loss of horticultural holdings is worrying as it extends to a loss of specialist growers and explains in part the reduction in area of vegetables grown and overall output. In fact, although general cropping farms produce more vegetables by area than horticulturalists - by a factor of roughly 8 to 1 - specialist horticulture produces more fruit.[xxviii] Of all main foodstuffs the UK performs lowest on fruit and vegetable production, and domestic production – particularly under glass and in polytunnels - is falling, resulting in a decline of fresh supplies and an increased dependency on imports from the EU and beyond. This is concerning for the security of our overall food supply but also as eating more fruit and vegetables is good for our health and reduces the overall harmful impact of the food we eat on nature and the climate.

BOX TO SECTION 3.5: Significant drop in UK vegetable production

Since 2011 there has been a notable fall in vegetable production in the UK which may shed light on the identified falls in horticultural enterprises in the urban fringe. Furthermore, and concerningly, the rate of change appears to have accelerated sharply since 2021.

Table 5 (below) assesses the period 2011 to 2021 and is brought up to date with the most recent government data from 2023. It shows that both open field and under-cover production of vegetables have fallen since 2011 by 17 and 33% respectively, with an increased reliance on imports as domestic supply has dropped.

Table 8 - Aspects of UK vegetable production 2011 – 2023

	2011 (provisional)	2021	2023	Change 2011 - 2023
Area under production (thousand hectares)	121	113	101	-16.5%
Open field	120	107	100	-16.7%
Protected	1	0.7	0,7	-33.3%
Value of production (£ million)	1,217	1,683	1,860	
Open field (£ mn)	913	1,295	1,486	+62.3%
Protected (£ mn)	304	388	374	=23%
% of total value from protected crops	25%	30%	25.3%	+0.3 % points
Total UK production (million tonnes)	2,569	2,548	2,216	-13.7%
Total imported (mn to)	1,961	1,978	2,061	+5.1%
Total exported (mn to)	88	69	76	-13.6%
Production as % of total new supply for use in UK	58	57	53	-5% points

Sources: 2011 data Agriculture in the UK 2021/2; 2021 and 2023 data table 7.8a and 7.8c from Agriculture in the UK 2023

4. Previous trend analysis of farming on the urban fringe

Drawing on previous analysis (from 2006) we can speculate on reasons for the more recent changes in urban fringe farming. These include: the knock-on impact of wider societal changes (such as the development of major infrastructure); the need and appetite for other activities to supplement financial income (e.g. stabling, education); and the impact of local food networks.

In recent years there has been a lack of analysis about farming on the urban fringe and little research into trends and support needs for urban fringe farmers. An in-depth study from nearly 20 years ago offers the most current trend analysis on the topic to our knowledge.[xxix] Looking back at this study adds further context to more recent findings and highlights how current data appears to build on previous trends.

The study found overall that farming in the urban fringe was declining and being displaced by other land uses. Our analysis of government data from 2010 to 2021 indicates that this trend has continued.

Reasons for land use change away from farming

The 2006 study found three key factors determining whether land use had changed away from farming in the period between 1990 and 2006:

- The size and level of financial support for certain farm types with larger farms and cereals, dairy, sheep and beef farming proving more resilient than other unsupported types of farming such as horticulture, pigs and poultry.
- The collapse of market gardening around urban areas - often on more vulnerable smaller holdings – which further fragmented who owns and manages urban fringe land.
- The development of major infrastructure disrupted land holdings and the compulsory purchase and loss of land could shrink farms to a size which is no longer viable.

The nature of urban fringe farms

The study found that urban fringe areas were very different from each other but that some trends were true for all areas:

- There were fewer commercial farms than national figures, and farm sizes became smaller closer to the urban edge.
- Farms relied heavily on other activities to support the farm financially with horse-related businesses most popular (e.g. stabling, riding).
- Around a quarter of farms were processing farm produce for sale locally, but for the majority, most of their income came from selling in the national or international market.

Opportunities for urban fringe farming

The study identified several areas of opportunity for urban fringe farming to help further objectives of government policy at the time:

- Processing farm produce for local markets – 60% saw it as a benefit of their location.[xxx]

- Realising greater uptake of environmental payments to farmers – in 2006 just under half (47%) of interviewees were in the main agri-environment scheme, Countryside Stewardship (now replaced by the SFI), although uptake was lower nearer the urban edge. [xxxi]
- An appetite from urban fringe farmers to generate further income from providing public access and recreation as well as offering education and school visits.

In most respects, these opportunities are likely to remain. For urban fringe farms urban populations are a significant market to tap into, though we lack recent research on local food networks to fully understand the health of the local food sector. Supermarkets, as the main competition, continue to dominate food retail. [xxxii] Agri-environment schemes are more important than ever to farm financial support as direct area-based payments to farmers have been cut. Yet, CPRE research shows the uptake of agri-environment schemes in Green Belts has continued to be low for its land area as a share of England's farmed land (data for 2020):

- Coverage was lower than for other countryside in England at 19% of all Green Belt land compared to 28% of England.
- Committed spending on Green Belt farmed countryside was only 7.25% (£230m) of the committed budget despite 11% of England's farmland being within the Green Belt. More widely, only 15% of spend was in the urban fringe despite this area containing 21% of England's farmland.[xxxiii]

5. Strengthening farming on the urban fringe

The issues that are preventing urban fringe farming from evolving and thriving are multitude: from planning system issues to a lack of clear understanding, these failures need our attention if changes are to be made. Our recommendations to strengthen farming on the urban fringe include improved policies, targeted support for farmers, and further data collection and analysis to better inform next steps.

5.1. The Land Use Framework (LUF)

Issues: The planning system is the main public policy tool that influences how urban fringe land is used spatially but is poor at taking account the value and multiple benefits of farming. This means farmland best suited to producing food can be lost to other uses potentially in perpetuity. We lack the strategic tools and the framework to guide good local decision-making.

CPRE recommends that the LUF should:

i) Provide strategic oversight of the total land available and needed for a secure supply of food under sustainable land management.
ii) Identify urban fringe areas as priorities for supporting nature and sustainable land management.
iii) Update the evidence on the location and productive properties of farmland through the Agricultural Land Classification system
iv) Strengthen policy protections for high-quality land.
v) Encourage local authorities, through strategic land use plans, to bring forward new models for large-scale landscape enhancement in urban fringe countryside that does not already benefit from being part of a national or regional park or National Landscape.

5.2. The Farming and Countryside Programme – environmental land management

i) Develop and promote a targeted urban fringe land management package

Issues: The new ELM schemes, in development since 2016, are now in principle fully rolled out but they represent a largely voluntary system and lack targeted measures to improve urban fringe farmland or to foster joined-up actions, especially on farms across these landscapes. CPRE research shows Green Belt areas are underrepresented in such agri-environment schemes.[xxxiv] This is a missed opportunity: urban fringe areas have huge potential for benefitting people in nearby towns and cities in multiple ways.

Removal of the long-standing 5ha threshold for farm size for agri-environment schemes in 2024 should enable smaller organic holdings to benefit financially from ELMs but there are barriers. Measuring in hectares is unlikely to work for small and diverse holdings such as intensive organic market gardens. Also, applying for multiple actions across small areas is unlikely to be practical. Applicants on the smallest farms with no history of eligibility may be unaware or unfamiliar with new schemes, easily put off by their complexity, and have limited access to affordable professional advice.

CPRE recommends that the Farming and Countryside Programme should:

i) Offer and promote a targeted package of actions within the Sustainable Farming Incentive (SFI) for urban fringe farming to accelerate the transition to sustainable farming and increase wider public benefits.

ii) Within the wider programme target to cover 70% of all utilisable farmland by ELM schemes, there should be a target to achieve 70% coverage across urban fringe agricultural land, as an area where such investments would achieve particularly high public benefit.

iii) Provide an attractive small farm package of bundled-up actions to make SFI easy to enter for nature-friendly smallholdings, especially market gardens and community supported farms (CSAs). This could reward actions that work synergistically on such holdings, such as green manures, companion crops, wildflower strips, agroforestry and hedgerow management, with one area payment for the holding and the package.

5.3. National Planning Policy Framework (NPPF) and national planning guidance

Despite sustainable development underpinning the NPPF, it does not sufficiently acknowledge the value of sustainable nature-friendly farming to the positive management, functioning and character of Green Belts as well as other urban fringe farmed areas, nor does it fully recognise the multiple environmental services such farmland can deliver.

The NPPF also aims to protect the highest quality land defined as 'best and most versatile' for the level and consistency of yield and range of crops that can be grown. This policy, in place since the 1990s, has been steadily weakened so that soil and land quality is no longer a determining issue in planning decisions. This means the best land is not securely protected for its long-term strategic value for secure national food supply. Localism has also required councils to focus on meeting shorter-term local need and land supply for development, forgoing the long-term importance of food supply.

CPRE recommends that the government should further revise national planning policies and guidance to:

- protect, support and encourage sustainable nature-friendly farming enterprises in the Green Belt and wider urban fringe for their contribution to sustainable development; and
- Provide stronger protection for farmland, particularly high-quality farmland

5.4.Government data on farming

Data from the Defra June farm surveys does not allow us to understand aspects which could better guide policy making and government funding and action – particularly for urban fringe areas but also other areas of countryside. We still lack a clear understanding of:

- How areas of commercial farmland are managed, whether production is sustainable and resilient or the direction of travel.
- How other non-commercial land is managed and for what purposes.
- Why farms move into different forms of crop/livestock production or out of food production altogether,
- What other services including environmental goods and services farms deliver beyond food output.

In such areas there is an urgent need to better understand the issues, to identify threats and opportunities for the sector and determine what measures could better support it to grow and thrive.

CPRE recommends that the government extends current data collection to understand trends within the urban fringe, and farmer/land manager behaviour and business decision making to better target policy, delivery of policy and value for money of spend.

6. Methodology

The analysis here uses data from the Defra June Census of Agriculture described as 'a large sample survey sent to a representative sample of holdings across England'[xxxv] - covering 2010 to 2021. We are grateful to Defra and Natural England for supplying this data. The Excel data table supplied covers total farm holdings, total area (i.e. farmed), farm types (dominant output), farm size bands (from <5ha to =>100ha) and the total number of animals or birds. The data only covers commercial holdings 'with significant levels of farming activity.' [xxxvi] Totals are provided for Green Belts and comparator areas overall, and for England overall.

This data is supplemented by similar data for 1990 and 2007 from the June Agricultural Survey and other sources featured in CPRE / Natural England, Green Belts: A Greener Future (2010) to give a historical perspective or cover specific aspects such as holding numbers or land quality. It also uses combined government 'Agriculture in the UK' reports (mainly 2021) specifically to compare food supply data and agricultural area for English urban fringe areas in relation to the wider UK. All relevant reports are referenced in endnotes.

In most cases, we have extracted by year and compared data from 2010 to 2021 to identify any numeric and so percentage change. Explanations of the analysis underpinning key tables are given in table notes.

Data typically refers to England only as the other UK nations do not have Green Belts or Comparator Areas. However, for analysis of fresh food supply generally only UK level data is available. In this case, we have used the best available data to estimate England's share.

Defra June farm survey data was used for all the major food types analysed. For livestock products, we used livestock headage data for England. When required, we estimated the proportion of land by using the percentage of farm types in the urban fringe which specialise in a product as a proxy for land area farmed under that crop. For livestock products, we likewise estimated using headage data for the urban fringe area. This is a more conservative estimate than using farm type for livestock.

Endnotes

[i] Calculations provided by Natural England for CPRE / Natural England. Green Belts: a greener future. 2010. P p.26. Total population in urban settlements within the Green Belt boundaries based on 2001 government Urban Settlement data for England corresponding to the 2001 Census data. Urban settlements were defined as areas of built up land with an associated population of 1,000 and a minimum area of 20 hectares. Settlements separated by less than 200 metres were linked. The settlements were extracted from the Ordnance Survey 1:10,000 scale maps, as at 1st April 2001.

[ii] CPRE (2023), State of the Green Belt 2023: A vision for the 21st century.

[iii] Wildlife and Countryside Link (2024), Improving Green Belt for nature, climate and people.

[iv] Green Belts have a special status set out in the government's National Planning Policy Framework to primarily prevent urban sprawl by keeping land permanently open.

[v] CPRE / Natural England. Green Belts: a greener future. 2010. p14
Comparator Areas are defined as : 'urban fringe areas around 17 towns and cities with no Green Belt, as well as the areas of land not designated around towns and cities partly surrounded by Green Belt." [Accessed 16 January 2025]

[vi] Source: Defra cut of Defra Survey of Agriculture and Horticulture - June 2007 & June 2021 – supplied to CPRE October 2024 ; area of England as per 2007 data reported in CPRE / Natural England. Green Belts: a greener future. 2010.

[vii] Defra 2007 and 2021, op cit.

[viii] CPRE / Natural England 2010, op cit.

[ix] The Food Production to Supply Ratio (commonly referred to as the "Self Sufficiency Ratio"), is calculated as the farmgate value of raw food production divided by the value of raw food for human consumption, and is estimated to be 60% for all food in 2022 and 73% of indigenous type food. In 2021, this was 61% and 74% respectively. Defra, Daera, Welsh and Scottish Governments. Agriculture in the United Kingdom 2022. 2023. p192 table 14.3
https://assets.publishing.service.gov.uk/media/6548e4bc59b9f5000d85a2cc/auk-2022-13jul23ii.pdf [Accessed 16 January 2025]

[x] U.K. Population (2024) - Worldometer UK population for 2021 of 67, 669, 000 (rounded up) [Accessed 16 January 2025]

[xi] Total value figures calculated by CPRE exclude production from mixed farms.

[xii] Welsh Government. Agricultural Land Classification. Frequently asked questions. May 2021.p3 'Normal agricultural land management will rarely, if ever, affect the ALC grading of land. The grading is based on the long term physical and chemical limitations of land for agricultural use. The current or historic agricultural management, or intensity of use, does not affect the ALC grade. ALC grading could potentially only be improved by very major and expensive interventions, well beyond the scope of normal agricultural works.'

[xiii] Continuing loss of peat soils is an example of where soil quality can be damaged due to soil loss: the organic matter in peat oxidises when soils are drained and cultivated so lost to the atmosphere as carbon dioxide.

[xiv] Defra. Agricultural Land Use and Crop Areas in England at 1 June - Land use table ; figures given are for total area on agricultural holdings, and for area under crops and fallow combined figures for total crops and uncropped arable land for 2021

[xv] Welsh Government. Survey of agriculture and horticulture, June 2022. Agricultural Land Use in Wales 1998 to 2022
Land Area table 2021 data; total area on farms per table; total area under crops including horticulture and glasshouses and bare fallow calculated for 2021 data from tablee

[xvi] Scottish Government. Scottish Agricultural Census: June 2024. [Accessed 21 January 2025] See detailed tables at https://www.gov.scot/publications/results-from-the-scottish-agricultural-census-june-2024/documents/agricultural-census---june-2024---detailed-tables/ - see Table 1 results for 2021 reported

[xvii] DAERA/NISRA The Agricultural Census in Northern Ireland – Results for June 2023. Table 3.1 Crop areas in Northern Ireland 2019-2023 (hectares) p12 – data reported here is for 2021 [Accessed 29 January 2025]

[xviii] 21.6%

[xix] 20.7%

[xx] Rounding adjustment – total is 25.4% so not 26%

[xxi] See CPRE / Natural England. Green Belts: a greener future. 2010. Table 20b – Number and size of farm holdings, 1990 and 2007. This gives comparable data for Green Belts and Comparator Areas as well as nationally. From 1990 to 2007 farm numbers fell overall nationally (17% fall) and in urban fringe areas, with a steep fall in micro farms (under 5ha) and a rise in the largest (above 100ha) also of 17% (a rise of 3857 farm holdings).

[xxii] These dates reflect the most comparable data cut for the Green Belt and Comparator Areas reported in CPRE / Natural England. Green Belts: a greener future. 2010 p128; see Table 20b – Number and size of farm holdings, 1990 and 2007

[xxiii] Illinois College (2019). 'Micro farming: Little farms with big profits'. Farmers Weekly website accessed January 2025.

[xxiv] Area on farms of 100 ha or over increased from 6,437,669ha to 6,767,700 from 2010 to 2021 based on Total farmed area and number of holdings by farm type and area size band(1,2) table in Defra Numbers of holdings and agricultural activity by farm type at 1 June each year in England structure-england-june-farmtype-28mar24.ods [Accessed 20 January 2025].

[xxv] See https://www.farmbusinesssurvey.co.uk/DataBuilder/UK_Farm_Classification_2014_Final.pdf [Accessed 20 01 25]

[xxvi] See https://www.farmbusinesssurvey.co.uk/DataBuilder/UK_Farm_Classification_2014_Final.pdf [Accessed 20 01 25] General cropping is described as:

'2. General cropping. Holdings on which arable crops (including field scale vegetables) account for more than two thirds of their total SO excluding holdings classified as cereals; holdings on which a mixture of arable and horticultural crops account for more than two thirds of their total SO excluding holdings classified as horticulture and holdings on which arable crops account for more than one third of their total SO and no other grouping accounts for more than one third.'

SOs are Standard Outputs for crops per hectare or livestock. We assume here no relevant production of food occurs on these holdings.

[xxvii] Jack, L. & Hammans, H., Unpicking food prices - Where does your food pound go, and why do farmers get so little? Sustain 2022, p6 This looked at staple farm items sold in supermarkets and shows that profit returned to farmers compared to costs incurred were 1% or often far less on a basket of staple items including apples and carrots

[xxviii] See Defra Numbers of holdings and agricultural activity by farm type at 1 June each year in England – see Table Key crop areas by farm type(1,2) for years 2009 to 2023 structure-england-june-farmtype-28mar24.ods [Accessed 20 January 2025]

[xxix] Land Use Consultants (LUC) with Kernon Countryside Consultants. The Nature And Potential Of Agriculture Around Major Urban Areas In England. July 2006. Prepared for The Countryside Agency and Partners. Not available online. This explored the character of farming around towns and cities in depth via interviews with a large representative sample of 83 landowners and farmers managing land in these areas

[xxx] LUC/Kernon 2006. p. vii and para 6.24

[xxxi] This is also despite a greater density of footpaths and other public rights of way in most Green Belt areas - see Figure 13 in CPRE / Natural England. Green Belts: a greener future. 2010. P35

[xxxii] For the most recent CPRE research see CPRE. From field to fork: The value of England's local food webs. June 2012. P23 From field to fork: The value of England's local food webs - CPRE [Accessed 20 January 2025]

[xxxiii] CPRE. The countryside next door. 2022. P 4 The countryside next door - CPRE [Accessed 20 January 2025]

[xxxiv] CPRE research in 2022 examined 2020 data for spend on continuing agreements with farmers under legacy schemes – Environmental Stewardship – as well as under the more recent Countryside Stewardship scheme ; this revealed an historic underfunding for Green Belt farmland. See CPRE. The countryside next door. 2022. p24.: only 7.25% of committed spend of the committed AE budget was allocated to GB "despite Green Belts covering 12.5% of England and being the countryside next door for half of England's population."

[xxxv] For details of the survey methodology, please go to: https://www.gov.uk/structure-of-the-agricultural-industry-survey-notes-and-guidance

[xxxvi] Defra define this as: "any holding with more than 5 hectares of agricultural land, 1 hectare of orchards, 0.5 hectares of vegetables or 0.1 hectares of protected crops, or more than 10 cows, 50 pigs, 20 sheep, 20 goats or 1,000 poultry." Note also that only commercial holdings are covered in post 200 data. For more information see https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/182206/defra-stats-foodfarm-landuselivestock-june-junemethodology-20120126.pdf