

Who Owns Scotland 2024 a preliminary analysis



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SUMMARY

- 83% of rural Scotland is owned by private entities (individuals, companies, trusts etc.)
- The ownership of privately-owned rural land has become more concentrated since 2012 as a result of existing owners acquiring more land.
- 433 landowners own 50% of the privately-owned rural land compared to 440 in 2012 and 2877 landowners own 70% compared to 3161 in 2012.
- The public sector estate has decreased by 20,907 ha (2.2%) since 2012
- Community landownership has increased by 40,048 ha from 172,294 ha in 2012 to 212,342 ha in 2024 (a 23% increase in extent).
- Legal entities (trusts, companies and partnerships) own around 75% of all privately-owned rural land
- Around 15% of privately-owned land has been owned by the same family for over 100 years, some acquired in the 12th century. Around 40% of privately owned land has been owned by the same family for over 50 years.

Legal

No warranty or guarantee is provided for any of the data or information in this report.

Versions

v.1	23 March 2024	Original publication
v.2	23 March 2024	Percentage area of rural Scotland in Table 1 corrected from 87.7% to 97.7%

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INTRODUCTION

In 2010, I published *The Poor Had No Lawyers - Who Owns Scotland (And How They Got It)* which contained statistics on the concentration of private landownership in Scotland and showed that 438 landowners owned 50% of the privately-owned rural land in Scotland.¹ In the second edition (2013), I edited these statistics in light of some obvious known changes and reported that 432 landowners owned 50% of the privately-owned rural land in Scotland. That statistic has since become widely repeated (though the source seldom cited) and has never been revised by me until now.

In order to contribute to public debate around the Land Reform (Scotland) Bill, introduced to Parliament in March 2024 I am publishing this preliminary analysis of who owns Scotland 2024. I shall publish a final analysis later in 2024. This analysis draws on research which is ongoing as part of my www.whoownsscotland.org.uk project.

This report provides the first authoritative analysis of who owns Scotland for 12 years. It sets out the main categories of landowner and how much land they own. It analyses the concentration of private rural landownership and provides a preliminary assessment of characteristics of Scottish landowners such as for how long they have owned their holdings, the legal characteristics of the owner and (importantly) whether and how the pattern of rural landownership has changed since 2012.

This report is therefore a preliminary report without the nice infographics that I would like but I which am useless at producing - so apologies for all the numbers.

METHODOLOGY

Data for this preliminary analysis is mainly derived from www.whoownsscotland.org.uk. This source represents completed empirical research on the largest 3069 privately-owned landholdings in Scotland covering 4.5 million ha of Scotland or 69.6% of the privately-owned rural land in Scotland. These in turn are part of a larger dataset of over 12,000 landholding records which I have assembled since 1994.

Of these 3249 records, 2237 are on the www.whoownsscotland.org.uk website and the remaining 1022 are landholdings where the boundaries and extent are known, but the ownership is yet to be determined or, in some cases, confirmed. Of these 1022 landholdings, 998 are less than 400 ha in extent. All ownership information is current as of a range of dates between April 2023 and March 2024.

This data was supplemented by confirming information on the total landholdings held by public bodies, environmental and heritage bodies, and community landowners. Although much of this data is already contained within the Who Owns Scotland corpus, the totality of, for example, the landholdings of the National Trust for Scotland or the Secretary of State for Defence were confirmed by reference to published data from the bodies concerned. Pulling all of this data together resulted in a final dataset covering 5.78 million ha or 75% of the land area of rural Scotland.

¹ My definition of privately-owned rural land is all rural land (so excluding urban areas) not owned by heritage bodies (NTS, RSPB etc), community bodies (Isle of Eigg Trust, North Harris Trust etc.) or public bodies (Scottish Ministers, SNH, MoD, HIE etc).

Before conducting the analysis, separate landholdings owned by the same owner (where, for example, Jean Smith owns 5 farms across Scotland) were merged to form one holding each, for analytical purposes. This reduced the total corpus from 3249 to 3069. The high-level statistics are set out in Table 1.

Table 1 High Level Breakdown of Scotland and Rural Landownership 2024			
	hectares (ha)	% or rural Scotland	
Scotland rural and urban			
Scotland land area (1)	7,882,480	100.0%	
Urban Scotland (2)	179,811	2.3%	
Rural Scotland	7,702,669	97.7%	
Breakdown of rural Scotland landownership			
Public ownership (3)	904,860	11.7%	
Community ownership (4)	212,342	2.8%	
Heritage ownership (5)	192,790	2.5%	
Private ownership	6,392,677	83.0%	
Notes			
(1) Scotland's land area is derived from Ordnance Survey digital boundaries of Mean High Water Springs			
(2) National Records of Scotland Settlements dataset (514 settlements of over 500 population)			
(3) Public ownership includes Scottish Ministers, Scottish Natural Heritage, Scottish Water etc.			
(4) Scottish Government, 2022. Community ownership in Scotland 2022. (October 2023)			
(5) Heritage owners include National trust for Scotland, RSPB, Scottish Wildlife Trust etc.			

Annex I contains further details on the organisations in the public, heritage and community sector who own land.

WHO OWNS SCOTLAND 2024

Scotland's pattern of rural landownership has long been characterised by the small number of people who own a large proportion of it.² Table 2 provides an analysis of the 83% of Scotland owned by private entities.

² See Callander (1986) A Pattern of Landownership in Scotland (Hagend Publications, Finzean) & see Wightman (2010) The Poor Had No Lawyers - Who Owns Scotland (And How They Got It) (Birlinn, Edinburgh)

% extent of privately-owned rural land 2024	No. of owners	Extent owned by these owners (ha)
10%	16	649,379
20%	51	1,284,025
30%	115	1,921,222
40%	225	2,560,817
50%	433	3,196,563
60%	968	3,835,832
70%	2877	4,474,892

Half of the privately-owned rural land is owned by 433 owners and 70% by 2877.

The concentrated pattern, evident for centuries, remains.

WHAT HAS CHANGED SINCE 2012?

On the face of it, not much has changed since 2012 but in order to understand what changes (if any) have occurred over the past 12 years, we need to ensure that we are comparing like with like. Given the small number of very large landholdings in rural Scotland, expressing such numbers as a percentage of the total privately-owned rural land means that any difference in the baseline definition of rural land is going to have an impact on the data and thus make any comparison potentially misleading.

The 2024 data is derived from modern digital records and some of the baseline data is different from that used in 2012. There are three adjustments that need to be made in order to effect a comparison.

First, the extent of Scotland in 2024 is derived from Ordnance Survey boundary data (7,882,480 ha). The figure used in 2012 was 3308 ha less than this.

Second, the figure for urban Scotland is derived from the National Records of Scotland digital records of urban and rural settlements. The figure for 2024 is 179,811 ha but in 2012 I used a figure 25,794 ha greater.

Thirdly, in 2012 I excluded inland water bodies (Loch Lomond, Loch Awe etc) from my definition of rural land. A number of these are privately-owned either in isolation or as part of neighbouring dry land. Thus it appears sensible to include this land as part of rural land rather than exclude it. This means that rural Scotland is 14,920 ha larger in 2024 than the equivalent figure I used in 2012.

The net effect of these adjustments is that the extent of rural Scotland used for the analysis of 2024 data is 44,022 ha larger than that in 2012.

Given that the 2024 figures are a more accurate reflection on the extent of rural Scotland, then in order to make an accurate comparison between 2012 and 2024, I have re-

calculated the number of owners in 2012 who own 10%, 20% etc. of the updated extent of rural land. These are shown in Table 3 with a comparison to the 2024 data.

% of private rural land held	No. owners 2012	No. owners 2024	extent (ha) 2024
10%	16	16	639,268
20%	50	51	1,278,535
30%	111	115	1,917,803
40%	224	225	2,557,071
50%	440	433	3,196,339
60%	989	968	3,835,606
70%	3,161	2,877	4,474,874

It is evident that, although the picture remains much the same from 2012 - 2024 in relation to the largest landholdings (with 225 owners owning 40% in 2024 compared to 224 in 2012), there is increasing concentration from 50% to 70% with 433 owners owning 50% (440 in 2012), 968 owners owing 60% (989 in 2012) and 2877 owners owning 70% (3161 in 2012).

Within the 50% of Scotland occupied by the largest holdings, there have been ownership pattern changes with some landowners decreasing the size of their landholdings but others accumulating more land (see Table 8). Beyond this 50%, land is now held in fewer hands due to enlargement of smaller holdings. In both cases, the dominant trend of the past 12 years is accumulation and expansion of land holdings by existing landowners.

Within rural land the extent of privately-owned land has also changed due to changes in the ownership of public, community and heritage land (Table 4).

Sector	Extent 2012 (ha)	Extent 2024 (ha)	Change (ha) since 2012
Public ownership	925,767	904,860	-20,907
Community ownership	172,294	212,342	40,048
Heritage ownership	194,552	192,790	-1762
TOTAL	1,292,614	1,309,992	17379

The aggregate effect of these changes is that the ownership of these three categories of land has **increased** by 17,379 ha (1.3%) since 2012.

As a consequence, the extent of privately-owned rural land has **decreased** by 17,379 ha (0.27%). This does not distort the comparison of privately-owned rural land from 2012 - 2024 very much. Had the extent of these 3 categories remained the same as in 2012,

then the number of owners owning 50% of privately-owned rural land would be 440 - exactly the same as it was in 2012. One way of excluding this distortion is to examine the number of owners who collectively own a total area of privately-owned rural above defined thresholds as set out in Table 5.

Total private land (ha)	No. owners 2012	No. owners 2024	% of private rural land 2024
500,000 ha	11	11	7.8%
1 million ha	32	33	15.6%
1.5 million ha	67	70	23.5%
2 million ha	122	126	31.3%
2.5 million ha	211	212	39.1%
3 million ha	354	352	46.9%
3.5 million ha	626	618	54.8%
4 million ha	1268	1253	62.6%
4.5 million ha	3380	3012	70.4%

Note (1) For example, 211 owners owned a total of 2.5 million ha in 2012. In 2024 it is 212

The analysis in Table 5 illustrates that up until a total land area of around 3 million hectares there is little change in the concentration of private rural landownership but beyond this, an increased concentration becomes evident with 68 fewer landowners owning 4.5 million ha (69.6%) of privately-owned rural land.

FURTHER ANALYSIS - SIZE CLASSES

Table 6 shows the distribution of privately-owned landholdings by size class.

Size Class (ha)	No. of holdings	Cumulative No. of holdings	Extent (ha)	Cumulative ha	% of private rural land	cumulative %
> 40,000	5	5	303,151	303,151	4.7%	4.7%
30,000 - 39,999	6	11	215,912	519,063	3.4%	8.1%
20,000 - 29,999	16	27	377,247	896,310	5.9%	14.0%
10,000 - 19,999	49	76	673,031	1,569,341	10.5%	24.5%
5,000 - 9,999	120	196	853,844	2,423,185	13.4%	37.9%
3,000 - 4,999	129	325	501,530	2,924,715	7.8%	45.8%
1,000 - 2,999	425	750	729,139	3,653,854	11.4%	57.2%
500 - 999	488	1,238	339,168	3,993,022	5.3%	62.5%
200 - 499	1,569	2,807	468,147	4,461,169	7.3%	69.8%
TOTAL	2,807		4,461,169		69.8%	

The table shows, for example, that there are 750 private owners owning holdings of over 1000 ha in extent accounting for 3.65 million ha or 57.2% of privately-owned rural land.

Table 7 Top 25 Largest Landowners 2024

	Landholding	Sector	Hectares	Owner
1	National Forest Estate & others	Public	720,126	Scottish Ministers
2	Glen Feshie & other holdings	Private	88,296	Wildland Ltd.
3	NTS properties	Environment	75,925	National Trust for Scotland
4	Buccleuch Estates	Private	64,463	Buccleuch Estates Ltd
5	RSPB properties	Environment	57,504	RSPB
6	Gresham House properties	Private	53,775	Gresham House Ltd.
7	Atholl Estates	Private	49,853	Atholl Trustees & Sarah Troughton
8	Mamore & Killiechonate Estate	Private	46,764	Simec Lochaber Hydropower 2 Ltd
9	Reay Estate	Private	38,365	Trustees of 4th Duke of Westminster
10	Invercauld Estate	Private	37,953	Captain Farquharson's Trusts
11	Seafield Estate	Private	37,901	Earl of Seafield and Trusts
12	Strathconon Estate	Private	36,933	Strathconon Estates Ltd.
13	South Uist Estate	Community	36,129	South Uist Estates Ltd.
14	Crown Estate Scotland	Public	35,589	HM King Charles II (Crown)
15	Scottish Natural Heritage	Public	34,393	Scottish Natural Heritage
16	Sutherland estate	Private	32,928	Executors of Countess of Sutherland
17	Blackmount & Glen Etive Estate	Private	31,832	Philip Fleming
18	Braulen & Glenavon Estate	Private	28,729	Andras Ltd. and Glenavon Ltd.
19	Stornoway Estate	Community	28,411	Stornoway Trust
20	Locheil Estate	Private	25,684	Trustees of Donald Cameron
21	Conaglen Estate	Private	25,541	Trustees of John & Richard Guthrie
22	Killilan, Inverinate & Benula	Private	25,485	Smech Properties Ltd.
23	North Harris Estate	Community	25,227	The North Harris Trust
24	Galson Estate	Community	23,637	Urras Oighreachd Ghabhsainn
25	John Muir Trust properties	Environment	24,347	John Muir Trust
	TOTAL		1,685,790	

Table 8 Top 25 Largest Private Landowners 2024

	Landholding	hectares	Owner
1	Glen Feshie & others	88,296	Wildland Ltd.
2	Buccleuch Estates	66,345	Buccleuch Estates Ltd
3	Gresham House properties	53,775	Gresham House Ltd.
4	Atholl Estates	49,853	Atholl Trustees & Sarah Hope Troughton
5	Mamore & Killechonate Estate	46,764	Simec Lochaber Hydropower 2 Ltd
6	Reay Estate	38,365	Trustees of the 4th Duke of Westminster
7	Invercauld Estate	37,953	Captain Farquharson's Trusts
8	Seafield Estate	37,901	Earl of Seafield and Trusts
9	Strathconon Estate	36,933	Strathconon Estates Ltd.
10	Sutherland Estate	32,928	Executors of Countess of Sutherland
11	Blackmount & Glen Etive Estate	31,832	Philip Fleming
12	Braulen & Glenavon Estate	28,729	Andras Ltd. and Glenavon Ltd.
13	Locheil Estate	25,684	Trustees of Donald Cameron
14	Conaglen Estate	25,541	Trustees of John and Richard Guthrie
15	Killilan, Inverinate & Benula	25,485	Smech Properties Ltd.
16	Applecross Estate	24,877	Applecross Estate Trust
17	Drummond Estate	24,665	Baroness Willoughby de Eresby
18	Various properties	24,258	Julia & Guy Hands
19	Corrour Estate	23,037	The Corrour Property Company
20	Corrievarkie Estate	22,738	Compania Financiera Waterville SA
21	Roxburghe Estates	22,524	Duke of Roxburghe
22	Gairloch Estate	22,482	Duncan Mackenzie of Gairloch
23	Cawdor Estate	22,147	Trustees of Cawdor Estate
24	Balmoral Estate	21,723	Canup Ltd.
25	North Uist Estate	21,353	Trustees of Countess of Granville
	TOTAL	856,188	

THE CHANGING TOP 25 LANDOWNERS

Table 7 lists the top 25 largest landowners in Scotland today (owning 1,685,790 ha or 21.9% of rural Scotland) and Table 8 lists the top 25 **private** landowners (owning 856,188 ha or 13.4% of privately-owned rural land).

The increased concentration of private landownership over the past 12 years is driven by existing (or in the case of Gresham House, new) landowners expanding their landholdings by acquiring more land. This is illustrated by the green highlighted entries in Table 8. The growth in extent of these expanding estates more than offsets the reduction in the hectareage of Buccleuch Estates highlighted in red. The most significant changes in the rankings of the largest landowners since 2012 are as follows.

- Wildland Ltd (Anders Povlsen) has expanded its landholdings by 37% from 64,457 ha in 2012 to 88,296 ha in 2024.
- Buccleuch Estates has reduced its landholdings by 32% from 97,890 ha in 2012 to 66,345 ha in 2024.
- Gresham House Ltd. owned no land in Scotland in 2012 and now owns more than 53,775 ha of land via a number of Scottish Limited Partnerships and other vehicles making it the third largest private landowner in Scotland.³
- Strathconon Estates Ltd. has expanded its landholdings by 31% from 28,266 ha in 2012 to 36,933 ha in 2024 through the acquisition of Scardroy Estate in 2013 and Ledgowan Estate in 2017.
- Julia and Guy Hands owned 7113 ha in 2012 and have expanded their landholding by 241% to 24,258 ha in 2024. This includes the 5632 ha Griffin Estate in Perthshire on the market in 2023 at offers over £130 million.
- Corroul Estate has expanded by 19% from 19,363 ha in 2012 to 23,037 ha in 2024.

Beyond the top 25, there are many other new landowners and others who are expanding their holdings. Some of those who acquired rural estates in 2020 - 2022 are identified in my Rural Land Sales 2020 - 2022 report.⁴

FURTHER ANALYSIS - LEGAL STATUS

Land can be owned via a wide range of legal vehicles. The only significant restriction on ownership is that land can only be owned and registered by someone over the age of 16. Prior to the abolition of feudal tenure in 2004, firms could not hold title but now they can. Table 9 analyses a number of broad categories of legal entity. The analysis has not been conducted over the full corpus of data but over a reduced dataset covering 1639

³ This extent of land represents the total owned by Gresham House at the point I froze the data for this preliminary report (18 March 2024). Since then I have identified a further 358 ha and there will be more to add by the time of the final analysis.

⁴ Wightman, A. 2024. Rural Land Sales 2020 - 2022. https://andywightman.scot/docs/Rural_Land_Sales_2020_22.pdf

landholdings of over 1000 ha in extent covering 4.1 million ha of land (64.2% of the privately-owned rural land).

Entity	No. of holdings	Extent (ha)	% of private rural land
UK Companies (UK) (1)	446	1,165,590	18.2%
Trusts and Firms	339	1,129,199	17.7%
Individuals	480	928,251	14.5%
Offshore entities (2)	128	352,886	5.5%
UK Companies (Offshore) (3)	74	275,455	4.3%
Limited Liability Partnership	51	76,010	2.1%
Scottish Limited Partnership	66	40,386	1.2%
TOTAL	1584	3,967,777	62.1%

Notes

(1) This refers to UK registered companies where the companies are owned and controlled by persons resident in the UK.

(2) This refers to legal entities that are registered in a jurisdiction outwith the UK.

(3) This refers to UK registered companies where the beneficial owner is an individual, a trust or another company residing or registered in a jurisdiction outwith the UK

Land can be held in the same family for many years. Table 10 is a preliminary analysis of how long land has been owned without a sale to a third party. It is based on a partial corpus of 841 landholdings covering 2,071,330 ha (32.4% of privately-owned rural land). The final analysis report will cover a greater extent (it is time-consuming research).

Years owned	Number	Extent (ha)	% of private rural land
>100 yrs	102	642,661	10.1%
50 - 100 yrs	114	408,675	6.4%
25 - 50 yrs	146	369,807	5.8%
10 - 25 yrs	189	348,085	5.4%
less than 10 yrs	290	302,100	4.7%
TOTAL	841	2,071,328	32.4%

ANNEX I

Public, Heritage and Community Landowners

This Annex lists the largest public, heritage and community landowners.

Organisation	Extent 2024 (ha)
Scottish Ministers (National Forest)	656,057
Scottish Ministers (agricultural estates)	94,037
Crown (Crown Estate Scotland)	35,589
Scottish Natural Heritage	34,393
Local Authorities	33,497
Secretary of State for Defence	23,100
Scottish Water	23,000
Highland & Islands Enterprise	3,987
TOTAL	903,660

Analysing landownership by public bodies is frustrated by the poor quality of so much data. Some of these bodies publish no data or unreliable data (Scottish Ministers). Some provide data but in a format that is difficult and time-consuming to interpret (local authorities). The three most reliable sources are Scottish Natural Heritage, Crown Estate Scotland and the Secretary of State for Defence (MoD). Figures will be improved in the Final analysis.

Organisation	Extent 2024 (ha)
National Trust for Scotland	75,925
Royal Society for the Protection of Birds	57,504
The John Muir Trust	24,347
The Woodland Trust	13,285
Scottish Wildlife Trust	8,748
Church of Scotland General Trustees	5,010
Trees for Life	4,037
Borders Forest Trust	3,124
Plantlife International	1,921
Royal Scottish Forestry Society	1,306
TOTAL	195,207

Table 13 Main Community Landowners 2024	
Organisation	Extent 2024 (ha)
South Uist Estates Ltd.	36,129
Stornoway Trust	28,411
The North Harris Trust	25,227
Urras Oighreachd Ghabhsainn	23,637
Assynt Foundation	18,031
Urras Sgìre Oighreachd Bharabhais Community Co.	13,926
Pairc Trust	10,999
Assent Crofters Trust	8,116
West Harris Trust	7,861
Melness Crofters' Estate	6,784
The Knoydart Foundation	5,052
Urras Oighreachd Charlabhaigh	4,788
The Langholm Initiative	4,237
Isle of Eigg Heritage Trust	2,945
North West Mull Community Woodland Co Ltd.	2,541
Borve and Annishader Township	1,848
The Isle of Gigha Heritage Trust	1,373
Garbh Allt Community Initiative	1,328
Culag Community Woodland Trust Ltd.	1,188
TOTAL	200,532

Table 12 accounts for 19 community landowners who collectively own around 96% of all community owned land in Scotland.