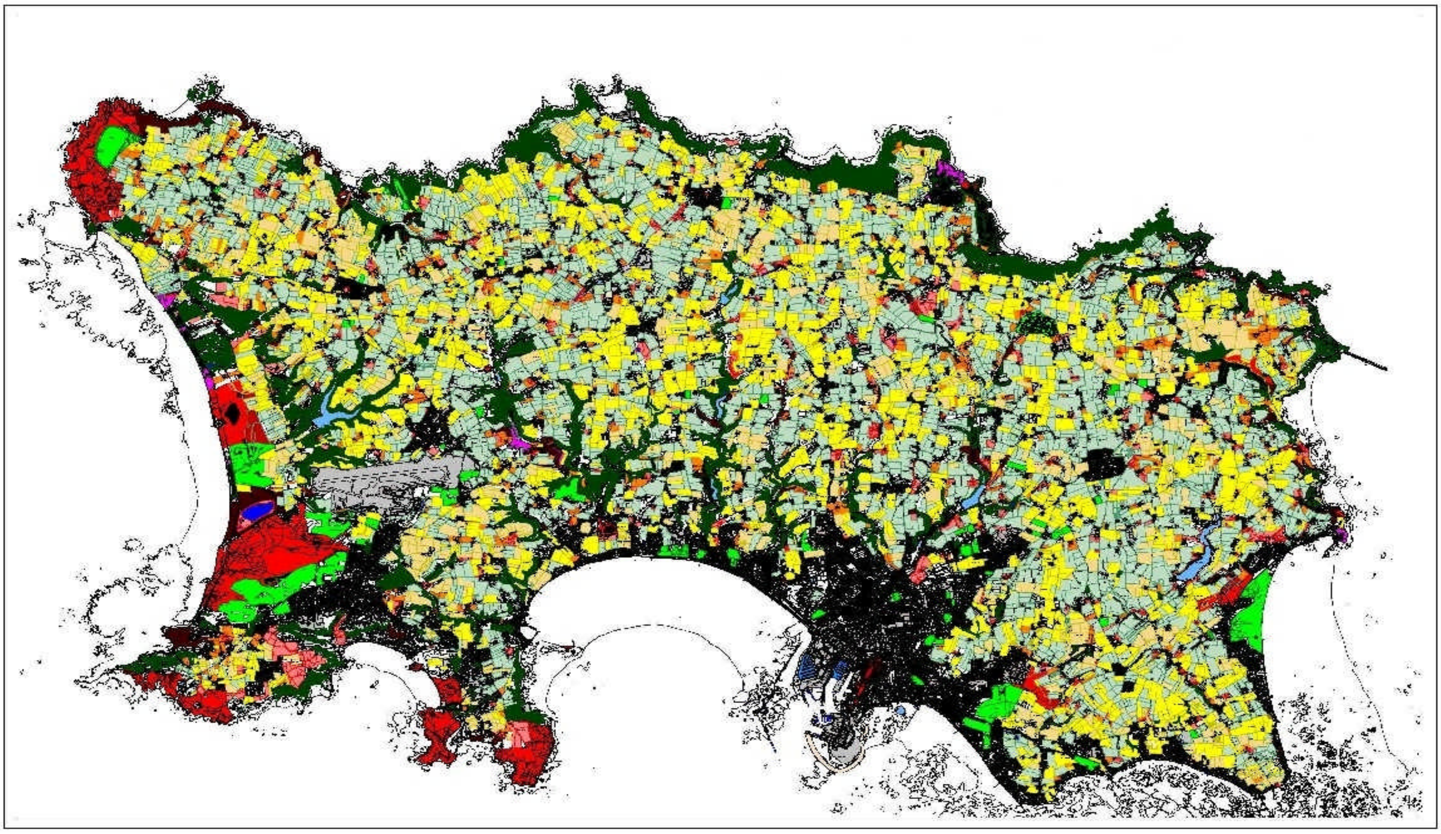
Rural Economy



Agricultural Statistics 2015

Economic Development
Tourism Sport and Culture

States of Jersey

ECONOMIC DEVELOPMENT
AGRICULTURAL STATISTICS FOR 2015

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AGRICULTURAL STATISTICS FOR 2015

Foreword

There was good news from the dairy sector with the average milk yield per cow per year continuing to rise. It now averages 4,947 litres per cow which is an increase of 4.1% year on year. This rise can be attributed to the use of world class genetics through the import of international Jersey bull semen from around the world. In addition, despite over production in world milk supplies, the Jersey Dairy has continued to develop export markets for value added products in countries such as India, Hong Kong and Japan.

2015 was not such a good year as 2014 for Jersey Royals with the level of exports down from 31,000 tonnes to 29,500 tonnes with a drop in value from £29M to £27.5M. The drop in exports was in part due to the cool wet conditions in May (some parts of the UK had more than double the average, with the overall rainfall being 158% of average) and in part due to the competition from regional and imported potatoes available on the shelf at a very competitive retail price. The lower demand meant that some growers had to leave some fields as the tubers were too large for the market and some fields were ploughed back in unharvested.

The top fruit area continues to grow and the year saw a further increase of 17% in area. This area mainly consists of cider apple orchards for cider and spirit production. The 275 vergées of orchards is an impressive increase of 43% since 2012.

The area cropped with organic fruit and vegetables increased by 13% which was mainly due to a change in use from organic grassland. The total area of organic crops fell by 13% to 973 vergées.

Senator Lyndon Farnham

Minister for Economic Development, Tourism, Sport and Culture

AGRICULTURAL STATISTICS FOR 2015

This document summarises selected information collected from the agricultural returns completed in October 2015 by those who occupy or manage agricultural land of more than one vergée.

Agricultural Structure

Further revisions of the data has been undertaken and large gardens, woodland areas, scrubland etc have been identified and removed from the agricultural land bank in the 2015 data.

Table 1: AGRICULTURAL STRUCTURE (revised table)

Area of Jersey = 64,612 vergées	**2011**	**2012**	**2013**	**2014**	**2015**
Land areas					
Owned and farmed	9,072	9,034	8,536	7,120	7,298
Rented	27,797	27,970	26,893	27,204*	26,263
Total	**36,869**	**37,004**	**35,429**	**34,324***	**33,561**
Land Percentage					
Area of agricultural land (% of Island area)	57.1	57.3	54.8	53.1*	51.9
Land Owned (% of agricultural land)	24.6	24.4	24.1	20.7*	21.7
Land Rented (% of agricultural land)	75.4	75.6	75.9	79.3*	78.3
**Number of holdings ** **					
1 - 10 vergées	270	268	256	213	211
Above 10 < 25 vergées	120	121	130	106	104
Above 25 < 50 vergées	65	56	55	40	47
Above 50 < 75 vergées	24	22	22	22	20
Above 75 < 100 vergées	7	7	7	7	9
Above 100 < 250 vergées	24	28	27	25	22
Above 250 < 500 vergées	17	13	13	13	12
Above 500 < 1000 vergées	7	9	7	6	6
Above 1000 vergées	5	5	6	7	6
Total	**539**	**529**	**523**	**439**	**437**

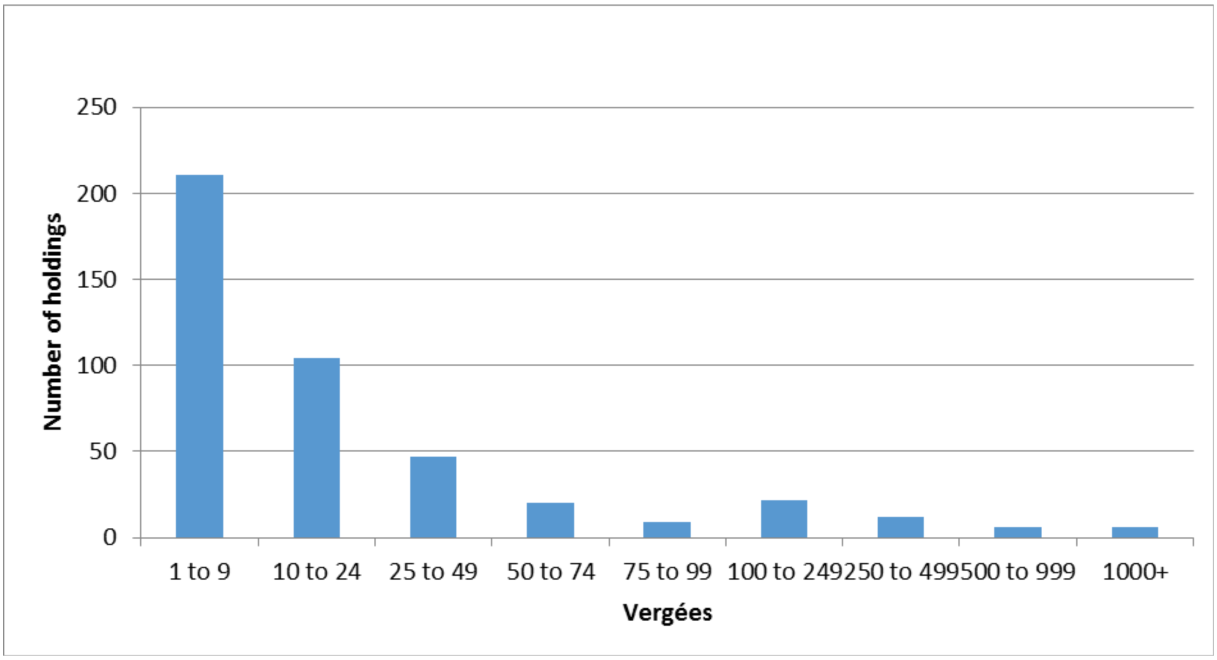
***Amended figure**

****NB. A holding does not constitute a working farm but represents a company or individual owning a recognised area of land which is classified as agricultural and to which certain conditions apply.**

Table 2: MISCELLANEOUS DATA

Area of Jersey = 64,612 vergées	2011	2012	2013	2014	2015
Average size of holding (vergées)	68	70	68	78	77
Area irrigated (vergées)	2,302	1,613	1,978	1,911	1,911
Uncultivated land (vergées)	1,832	1,734	1,831	NR	NR
Uncultivated land as a % of agricultural land	5.0	4.7	5.2	NR	NR

Chart 1: Number of Holdings* 2015 – Distribution by size



***NB. A holding does not constitute a working farm but represents a company or individual owning a recognised area of land which is classified as agricultural and to which certain conditions apply.**

Number of businesses claiming Single Area Payment (SAP) and Quality Milk Payment (QMP)

A better understanding of the level of commercial agricultural activity can be gauged by examining the number of businesses which claim the SAP and QMP.

Table 3: NUMBER OF HOLDINGS CLAIMING SAP and QMP

Holding size	Total Holdings	Businesses claiming SAP & QMP
1 - 10 vergées	211	0
Above 10 < 25 vergées	104	8
Above 25 < 50 vergées	47	13
Above 50 < 75 vergées	20	6
Above 75 < 100 vergées	9	1
Above 100 < 250 vergées	22	23
Above 250 < 500 vergées	12	11
Above 500 < 1000 vergées	6	7
Above 1000 vergées	6	6
Total	**437**	**75 (17%)**
Total agricultural area (vg)	**33,561**	
Area on which SAP & QMP claimed (vg)		**26,699**
Area subject to SAP & QMP		**80%**

* Agricultural statistics are as at 1st October whereas the SAP areas are based on a calendar year

Single Area Payment

Land eligible for the SAP will include all land used for commercial agricultural, including livestock grazing, fields in a recognised arable rotation and fields used by commercial livery stables, provided the land user is either a bona fide agriculturalist or recognised as a smallholder.

The SAP is paid to the person who is responsible for the agricultural management of the land and in most cases this will be the legal tenant.

Quality Milk Payment

Dairy farms receive an additional payment which amounted to £144 per cow per in 2015.

Compliance

Receipt of the SAP and QMP will be conditional on the applicants' compliance with basic levels of Good Agricultural and Environmental Practices (e.g. The Water Code, Animal Welfare Codes, etc) and the provision of basic financial data.

Table 4: FARM LABOUR - Peak Season

Farm Labour	2011	2012	2013	2014	2015
Whole Time	669	635	592	511	525
Part Time	205	188	196	138	120
Seasonal or Casual Workers	1073	837	875	933	865
TOTAL	**1,947**	**1,660**	**1,663**	**1,582**	**1,510**

Farm Labour

Full time employees showed an increase of 3%, part time staff a reduction of 13%, with seasonal and casual workers decreasing by 7%. There was a 5% overall reduction in the number of staff employed.

Chart 2: Vegetable and Flower Exports (% value)

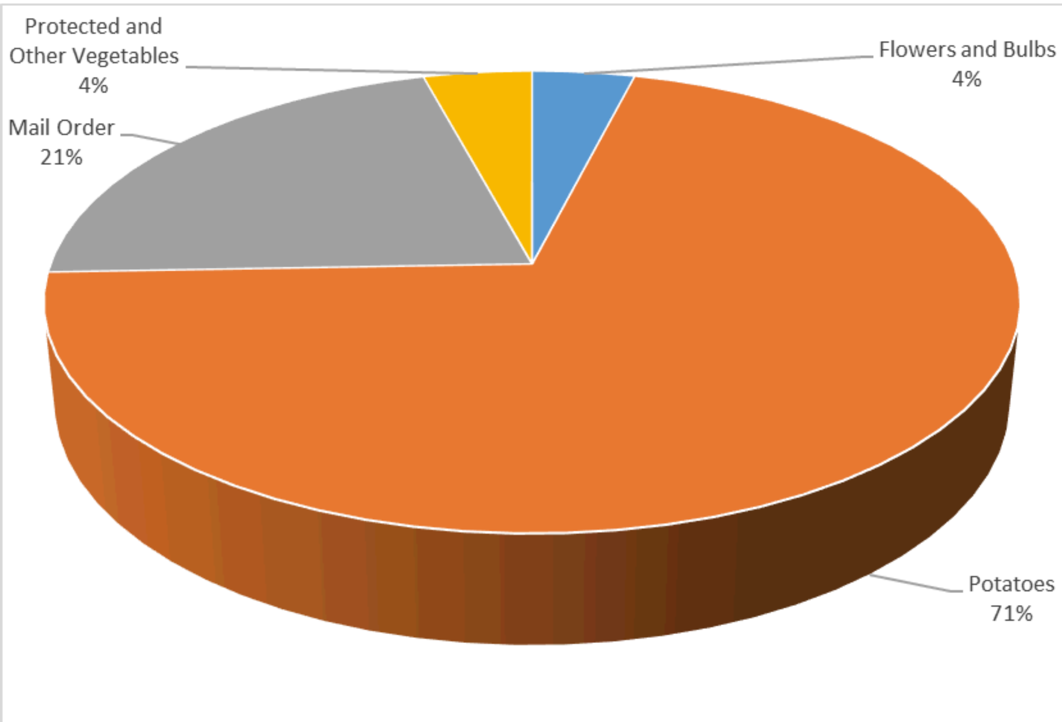


Table 5: VEGETABLE EXPORTS

	2011		2012		2013		2014		2015	
	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)
Beans	26	33,823	5	8,410	14	13,322	16	21,055	14	15,356
Cauliflower	58	97,974	22	38,878	20	34,498	17	28,262	13	19,246
Courgettes	524	423,902	569	489,308	436	393,728	566	515,860	421	361,485
Potatoes	30,890	30,837,079	28,588	27,008,402	28,417	27,545,279	31,393	28,996,678	29,693	27,554,627
Protected Cropping	264	206,923	192	174,815	119	231,907	141	316,830	86	198,724
Others	1,074	1,154,219	905	1,162,108	848	1,029,142	1,335	1,169,448	938	1,052,367
Total vegetables	**32,836**	**32,753,920**	**30,281**	**28,881,921**	**29,854**	**29,247,876**	**33,468**	**31,048,133**	**31,165**	**29,201,805**

Table 6: FLOWER EXPORTS

	2011		2012		2013		2014		2015	
Flowers	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**
Anemones	246	3,720	4	16	NR	NR	NR	NR	NR	NR
Lilies	12,479	277,106	1,762	44,168	1,715	33,162	NR	NR	NR	NR
Narcissus Flowers	56,730	722,311	44,542	632,072	69,947	971,565	76,782	1,022,262	90,378	1,225,192
Others	110	5,218	NR	NR	NR	NR	NR	NR	1,399	28,615
Sub-total flowers	**69,565**	**1,008,355**	**46,308**	**676,256**	**71,662**	**1,004,727**	**76,782**	**1,022,262**	**91,777**	**1,253,807**

Table 7: BULB AND TOTAL EXPORTS

	2011		2012		2013		2014		2015	
Narcissus Bulbs (t)	**Tonnes**	**Value (£)**	**Tonnes**	**Value (£)**	**Tonnes**	**Value (£)**	**Tonnes**	**Value (£)**	**Tonnes**	**Value (£)**
Sub total bulbs	617	399,101	470	328,163	384	286,383	426	**267,164**	456	**299,346**
Mail Order (Plug Plants etc)*	NR	NR	NR	23,414,013	NR	11,539,579	NR	**11,834,951**	NR	**8,352,000**
Total flowers and bulbs		**1,407,456**		**24,418,432***		**12,830,689**		**13,124,377**		**9,905,153**
Total value of all crops		**34,161,376**		**53,300,353***		**42,078,565**		**44,172,510**		**39,106,958**

* Amended figures taking into account mail order and plug plant exports

Outdoor Crops

Potatoes

Table 8: POTATO AREAS

Vergées	2011	2012	2013	2014	2015
Potatoes					
Jersey Royals	18,048	17,992	16,397	16,836*	15,987
(Jersey Royals under polythene)	(10,032)	(10,311*)	(11,246*)	(10,440*)	(9,875)
Autumn Earlies	217	51	40	61	80
Other potatoes (incl. maincrop)	708	627	1,604	763	495
Total all potatoes	**18,973**	**18,670**	**18,041**	**17,660**	**16,562**

*Amended figure

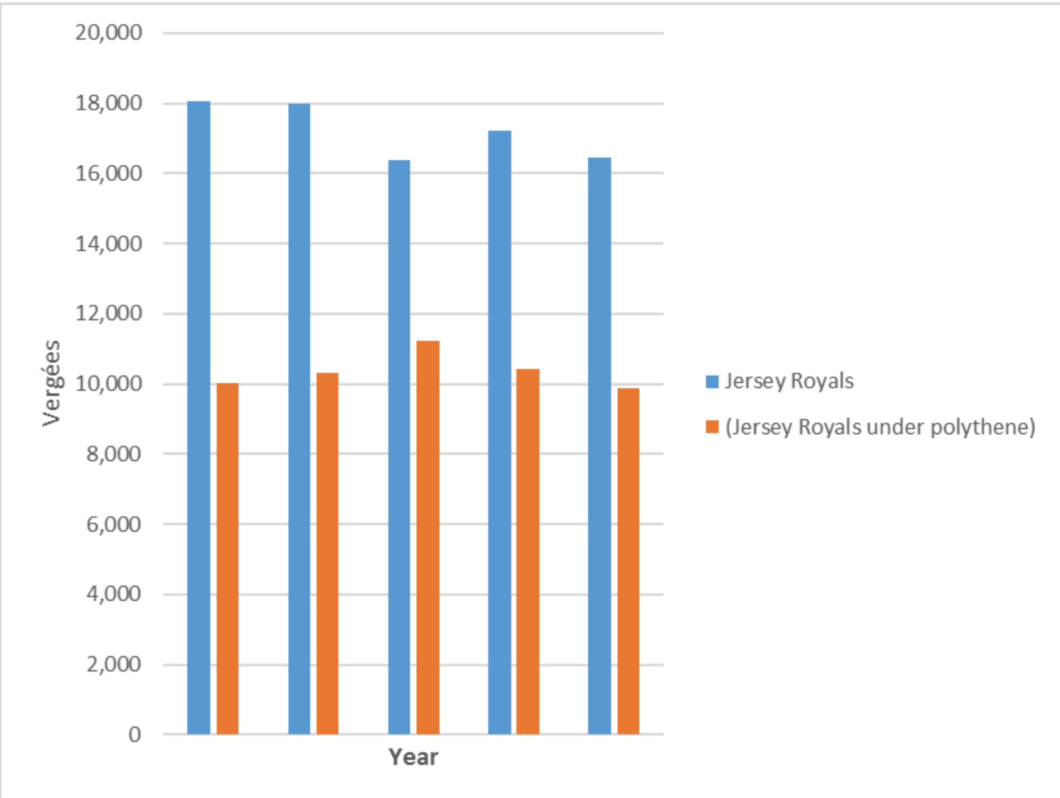
Area

The area of early Jersey Royal potatoes recorded decreased by 5% from 16,836 vergées in 2014 to 15,987 vergées in 2015. The autumn early increased by 31% though the area of other, including main crop, decreased by 35% to 495 vg.

Production

Exports decreased by 1,700 tonnes, and gross returns were down by £1,442,051. The gross return per tonne increased slightly from £924 per tonne to £928 per tonne.

Chart 3: Area of Jersey Royals covered with polythene



The use of polythene on the area grown remained static at 62%.

Table 9: OUTDOOR FRUIT AND VEGETABLE CROPS (Vergées)

	2011	2012	2013	2014	2015
Beans	16	14	9	4	12
Brussels Sprouts	51	44	47	48	27
Cabbage	287	397	403	512	319
Calabrese					
Spring Planted	138	103	112	94	268
Autumn Planted	29	39	24	68	26
Carrots	139	110	122	129	87
Cauliflowers					
Summer and Autumn (maturing before 31.12)	121	62	60	56	34
Winter (maturing after 31.12)	93	93	90	65	45
Courgettes	276	256	245	212	232
Leeks	257	188	129	142	211
Lettuce	106	80	78	76	59
Onions	22	25	29	44	68
Parsley	25	26	7	3	7
Soft and cane fruit (other)	42	48	50	34	34
Strawberries	32	34	33	25	20
Tomatoes	8	0.3	5	1	9
Top Fruit	176	192	199	236	275
Other	451	386	350	425	438
Total Outdoor Fruit/Vegetables	**2,269**	**2,096**	**1,992**	**2,174**	**2,171**
Total Outdoor Fruit/Vegetables (including potatoes)	**21,241**	**20,766**	**20,033**	**19,834***	**18,733**
Of which crops grown to a recognised organic standard	465	447	466	374	421

*Amended

Vegetables

Beans
Beans climbed from 4 vergées to 12 vergées an increase of 200%.

Cabbage
The area decreased by 38% to 319 vergées.

Carrots
There was a decrease in area from 129 vergées to 87 vergées, down 33%.

Cauliflowers
Summer and autumn cauliflowers decreased from 56 vergées to 34 vergées a fall of 39%. The winter crop decreased from 65 vergées to 45 vergées a fall of 31%.

Courgettes
Courgettes increased by 9% from 212 vergées to 232 vergées.

Leeks
Leeks increased in area from 142 vergées to 211 vergées an increase of 49%.

Lettuce
The lettuce area further declined from 76 vergées to 59 vergées a decrease of 22%.

Onions
The onion area rose by 55% to 68 vergées.

Parsley
The parsley area increased by 133% to 7 vergées.

Fruit Crops

Strawberries
Strawberries fell by 20% from 25 to 20 vergées.

Other soft and cane fruit
Other soft and cane fruit remained static at 34 vergées.

Top fruit
The top fruit area still continues to increase and now stands at 275 vergées up 17%.

Summary
The total area of outdoor fruit and vegetables saw a decrease of 6%, from 19,834 vergées to 18,733 vergées. Jersey Royal potatoes decreased by 849 vergées, with other potatoes (autumn earlies and maincrop) decreasing by 249 vergées with other fruit and vegetables decreasing by 3 vergées.

The area of fruit and vegetables in organic production saw a 13% increase from 374 vergées to 421 vergées.

Table 10: OUTDOOR FLOWER CROPS (Vergées)

Narcissi	**2011**	**2012**	**2013**	**2014**	**2015**
First Year Second Year Over 2 Years	327 323 70	545 315 90	352 421 107	255 409 200	392 244 197
Total	**720**	**950**	**880**	**864**	**833**
Other	60	55	32	40	35
Total Outdoor Flowers	**780**	**1,005**	**912**	**904**	**868**

Flower Crops

Narcissus
First year plantings were up by 54% at 392 vergées, the second year crop down by 165 vergées and 2 year plus, down by 3 vergées. The total area under production was down by 4% at 833 vergées.

Other
The remaining crops were down at 35 vg and accounted for 4% of the outdoor flower area.

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Protected Crops

Table 11: GLASSHOUSE AREAS (m²)

	2011	2012	2013	2014	2015
	m²	m²	m²	m²	m²
Glasshouses under 5 years	7,034	7,022	6,088	5,800	5,800
Glasshouses 5 - 10 years	16,994	14,510	1,234	12	12
Glasshouses 10-15 years	49,411	51,869	38,681	26,019	20,131
Glasshouses over 15 years	224,039	217,655	229,803	193,639	199,527
Total area of glasshouses	**297,478**	**291,056**	**275,806**	**225,470***	**225,470***
Of which:					
Area heated	101,595	90,515	117,056	50,687	33,247
Area not cropped in last 12 months	44,107	41,875	40,887	24,150	21,468
% not cropped of production area	14.8	14.4	14.8	10.7	9.5

*Excludes garden centres, parks & gardens and derelict/rezoned glasshouse sites

Glasshouse Areas

The total glasshouse area still stands at 225,470 m² following the recent changes. The area of heated glass fell by 34% and the area of glass not cropped now stands at 21,468 m², a fall of 11% and 10% of the total area.

Table 12: GLASSHOUSE CROPPING (m²)

	2011	2012	2013	2014	2015
Glasshouse	m²	m²	m²	m²	m²
Tomatoes: Planted before 1st February	19,528	18,929	21,713	17,765	15,482
Planted after 1st February	28,620	9,566	8,673	8,506	2,089
Total tomatoes	**48,148**	**28,495**	**30,386**	**26,271**	**17,571**
Beans	5,122	1,865	1,864	1,626	3,636
Cucumber	9,257	9,049	10,578	8,147	10,651
Peppers	11,299	12,361	11,383	15,594	13,524
Potatoes: Planted before 1st November	104,845	87,382	69,223	63,331	55,696
Planted after 1st November	8,624	15,505	10,180	18,114	23,022
Strawberries	16,698	12,051	6,579	5,130	4,853
Others	12,052	35,719	12,846	11,659	28,069
Total fruit and vegetables	**167,897**	**173,932**	**122,653**	**123,601**	**139,451**
Sub-Total (Fruit, vegetables & tomatoes)	**216,045**	**202,427**	**153,039**	**149,872**	**157,022**
Ornamentals					
Bedding Plants	117,029	97,844	42,214	66,033	45,640
Pot Plants	3,946	856	456	NR	NR
Others	5,064	6,645	21,232	7,900	11,910
Sub-Total (Ornamentals)	**126,039**	**105,345**	**63,902**	**73,933**	**57,550**
Total (Glasshouse production)*	**342,084**	**307,772**	**216,941**	**223,805**	**214,572**

* Includes double cropping

Glasshouse Cropping

Tomatoes
The area of tomatoes planted before the 1st of February decreased from 17,765 m^2 to 15,482 m^2 a fall of 13% and the area planted after the 1st of February fell 75% to 2,089 m^2, giving an overall decrease in tomato production of 33%.

Potatoes
Potatoes planted before the 1st of November decreased by 12% though the later planted crop increased by 27% to 23,022 m^2 giving an overall fall of 3%.

Strawberries
The strawberry area fell by 5%.

Beans
Beans increased by 124% to 3,636 m^2.

Sweet Peppers
The area grown, decreased by 13% to 13,524 m^2.

Ornamentals
Bedding plants decreased by 31% to 45,640 m^2 though other ornamentals increased by 51% to 11,910 m^2.

The overall ornamental production decreased from 73,933 m^2 to 57,550 m^2

Table 13: POLYTHENE TUNNEL AREAS (m^2)

	2011	2012	2013	2014	2015
	m^2	m^2	m^2	m^2	m^2
Area of Multi Span	107,039	109,088	104,578	94,145	97,281
Area of Single Span	86,121	64,686	59,112	54,777	53,945
Total area of polythene tunnels	**193,160**	**173,774**	**163,690**	**148,922**	**151,226**
Of which:					
Area heated	53,631	33,859	34,114	22,254	21,654
Area not cropped in last 12 months	13,670	19,484	17,603	19,857	17,263
% of production area not cropped	7	11	11	13	11

Polythene Tunnel Areas

The total area of polythene tunnels increased, by 2%, to 151,226 m^2. The area of multi-span tunnels increased by 3,136 m^2 and the area of single spans fell by 832 m^2, a fall of 2%. The non-cropped area fell from 19,857 m^2 to 17,263 m^2, 11% of the production area.

Table 14: POLYTHENE TUNNEL CROPPING (m^2)

	2011	2012	2013	2014	2015
	m^2	m^2	m^2	m^2	m^2
Vegetables and fruit					
Beans	7,392	3,468	3,626	2,686	1,086
Celery	405	332	480	280	NR
Courgette	40	210	130	210	290
Cucumber	790	990	1,020	140	150
Lettuce	646	1,980	3,116	800	560
Sweet Peppers	7,092	19,801	21,801	17,498	23,666
Potatoes	146,226	120,061	104,318	104,384	106,908
Strawberries	1,520	4,771	4,771	4,771	3,571
Tomatoes	3,240	2,576	3,204	1,515	570
Others	32,503	38,277	27,432	27,280	21,125
Sub-Total (Fruit and Vegetables)	**199,854**	**192,466**	**169,898**	**159,564**	**157,926**
Ornamentals					
Anemones	40	40	320	320	NR
Bedding Plants	17,349	11,046	11,305	3,818	3,904
Freesias	540	352	352	312	312
Gypsophila	500	NR	NR	NR	NR
Iris	540	NR	NR	312	312
Lilies	25,522	2,712	5,105	312	312
Narcissi	6,233	6,545	7,056	12,278	12,278
Nursery Stock	7,451	8,301	10,031	914	4,672
Pot Plants	4,252	920	960	435	410
Others	1,492	1,426	1,086	312	1,076
Sub-Total (Ornamentals)	**63,919**	**31,342**	**36,215**	**19,013**	**23,276**
Total (Polythene tunnel production)	**263,773**	**223,808**	**206,113**	**178,577**	**181,202**

Polythene Tunnel Cropping

Potatoes: Potato production increased slightly to 106,908 m^2.

Tomatoes: Tomato area decreased by 62% from 1,515 m^2 to 570 m^2.

Beans: Bean area decreased by 60% from 2,686 m^2 to 1,086 m^2.

Sweet Peppers: Sweet peppers were up from 17,498 m^2 to 23,666 m^2 an increase of 35%.

Ornamentals: Ornamental production increased by 22% to 23,276 m^2.

Total production: The overall production increased by 1%.

Protected Organic Sector

10,092 m^2 of organic crops were grown under protection of which 5,946 m^2 were Jersey Royal potatoes.

Livestock

Cattle (including the dairy industry) Table 15

In 2015 total cattle numbers in Jersey reduced by 236 to 4,878 animals a decline of 4.6%. The number of cows and heifers held in milking herds in Jersey has also fallen from 2,946 in 2014 to 2,807 a fall year on year of 4.7%. This reduction in total cattle held on farms in Jersey has been due to a number of factors including:-

- the decline in the number of dairy farms in Jersey
- increasing milk production per cow driven by the import of international genetics in 2008
- the milk licencing scheme operated by Jersey Dairy curtailing the output of individual dairy farms in line with market demand

Milk production on dairy farms supplying Jersey Dairy has fallen for the first time in 4 years down from 14,005,000 litres in the milk year ending 31st March 2015 to 13,886,000 in the milk year ending 31st March 2016 a fall of 1% year on year. In October 2015 the number of milk producers supplying Jersey Dairy fell to 20, including one organic producer, a fall of 3 on the previous year. In addition there is one independent dairy farmer processing milk for sale to retail outlets and direct to the public through their own farm shop.

Herd numbers and size (Table 16)

Although total cattle numbers have fallen significantly the average size of the remaining dairy herds has increased from 123 cows per herd in 2014 to 134 cows in 2015 a rise of 8.9% year on year. The average milk yield per cow has also risen year on year from 4,754 litres per cow in 2014 to 4,947 litres per cow in 2015 a rise of 193 litres per cow or 4.1%. The continuing rise in individual milk output per cow can be attributed to the relaxation on the import into Jersey of international Jersey bull semen in 2008 enabling dairy farmers to improve the milking ability of their herds, via artificial insemination, by the use of world class genetics. It was estimated in 2008 that it would take 10 years to see the full benefits of combining the conformation and longevity of the Jersey Island breed with the best economic and milking traits of the world Jersey population with an ever increasing number of animals being sired by international sires with many second, third and now fourth generation animals entering the herds.

In 2015 there were 2 herds holding less than 20 cows a decline of 2 on the previous year, with 8 herds holding between 20 – 100 cows, 1 herd holding between 101 – 150 cows, 2 herds holding between 151 – 200 cows and 8 herds holding over 200 cows a rise of 2 on the previous year. The 10 commercial dairy herds holding less than 100 cows in Jersey in total hold 518 cows or 18.5% of the Island herd (average herd size 52 cows). The 11 herds holding over 100 cows hold 2,289 cows or 81.5% of the Island herd (average herd size 208 cows). The above figures illustrate how the industry is divided between the smaller traditional units and the larger commercial dairy farms. The largest recorded milking herd in Jersey holds approximately 285 milking animals.

The gross sales value of the milk delivered to Jersey Dairy declined year on year from £14,014,000 (100.00 ppl) in 2014 to £13,732,000 (98.90 ppl) in 2015.Milk delivered to the Dairy reduced by 119,000 litres or 0.9%. This decline illustrates the effect of the current over production in world milk supplies and the stiff competition in export markets. Jersey Dairy has despite the above adverse factors, managed to maintain and grow a value added export market with product being exported to Hong Kong, China, South Korea, India, Japan and potentially other countries in the near future. This impressive performance has meant that Jersey Dairy has been able to curtail reductions in the farm gate milk price and milk intake to minimum levels based on the provenance of the ‘Jersey milk from Jersey cow in their Island home’ and therefore should be in a strong position to grow their export trade when international markets recover.

The price paid to conventional producers by Jersey Dairy has fallen year on year from 47.6ppl in 2014/15 to 46.4ppl in 2015/16 down 1.2ppl or 2.5%. The above fall in the milk price paid to dairy farmers, together with the decline in overall milk intake, has had a downward effect on farm profitability however nowhere near as severe as dairy farms in the UK and the rest of Europe have experienced. It is envisaged that overall milk output in Jersey will in future grow in line with expected increases in market demand however the Milk Licence Allocation Panel is not expected to issue any further production litres to producers until the market situation improves.

Heifers being reared as replacements for the dairy herd over the age of 12 months has decreased for second year in succession by 12.3% year on year a drop of 123 animals. Heifer replacements under 12 months of age has however increased by 19 animals or 2.5%. The total number of heifer replacements being reared by dairy herds in Jersey over the last five years has reduced from a high of 1927 in 2011 to 1659 animals in 2015 a decrease of 268 or 13.9%. This decline was to be expected as Jersey Island cows in individual dairy herds were replaced by heifers sired by international bulls as soon as possible after semen imports were allowed with the replacement rate gradually reducing as a greater proportion of the herd was sired by international bulls. It is not until 2018 that herd replacement rate is expected to return to a more normal 20 - 25% per annum. However, the number of heifer replacements being reared on farms could remain above this level due to the current development of an export trade for high quality in calf heifers to the UK.

Other Livestock

Beef

In 2011 there were 230 beef animals recorded in Jersey this figure rose to a high of 363 animals in 2013 before declining in 2015 to 300 a drop of 17.4% from 2013. This decline may suggest that the market for local whole beef carcases has become saturated limiting further market growth as there is only a small amount of local pre packed beef products available for sale in the Islands supermarkets because of a lack of carcase preparation facilities.

Poultry

In 2012 the number of laying hens rose steeply to 25,418 up 34.6% on the previous year. This increase in egg production was driven by a shortage of imported eggs, following the EU amending its regulations concerning the size of battery hen cages, the market for which has now been filled by local free range eggs. The above increase in laying hens was maintained in 2013 & 2014 with a further increase in 2015 being recorded to 27,431 birds a rise of 7.9%. This success is down to local egg producers meeting the exacting standards required by local supermarkets and other retail outlets limiting the imported product.

Table birds produced from chickens, ducks, geese and turkeys has been historically small due to the high rearing costs of local birds, involving the use of imported concentrated feeds, compared to the cost of imported table birds on supermarket shelves.

Goats

The number of goats in Jersey has historically been very small however there has been an increase in their numbers over the last 5 years up from 11 recorded in 2011 to 37 recorded in 2015 a rise of 236%. The market for goat milk and milk products sold in Jersey seems to be growing and it is understood a considerable amount of goat meat is also imported into Jersey and therefore we could see more goats in Jersey in future.

Pigs

The number of pigs held on farms reached a high of 477 recorded in 2013. In 2014 there was a decline when only 371 pigs were recorded down 106 animals or 22.2%. In 2015 a welcome rise in numbers to 432 animals was recorded up 16.4% with the growth in breeding sow numbers also continuing up from 52 to 54 year on year indicating that pig production could again increase next year. The local market for pig meat is quite large but again the cost of imported food and current land rental market puts local production at a disadvantage to the imported product.

Sheep

The growth in sheep numbers over the last few years has halted with sheep numbers declining year on year by 238 animals or 19% year on year. This decline is most likely driven by some retirements from the industry and less animals being kept for home production.

Equines (kept on farms)

Total horses, excluding donkeys, kept on agricultural holdings reached a peak in 2013 with 886 animals being recorded however there has been a decline over the last two years with only 767 animals being recorded in 2015 down 13.4%. Horses that are owned by farmers, and kept on farms have declined in the last two years by 91 animals. Horses at livery however have increased from 291 animals to 317 animals a rise of 26 or 8.9%. Donkeys owned by farmers have remained relatively static at 25 animals in 2015. There is some doubt concerning the number of horses in Jersey as this data set does not capture all the horses in the island. Estimates, supported by veterinary practices, suggest a more realistic figure should be between 1500 – 2000 animals. There is therefore a call from some within the agricultural industry for all horses to be registered to ascertain their true impact on the rural economy.

Table 15: CATTLE (Numbers)

	2011	2012	2013	2014	2015
Total cows and heifers in milk	**2,890**	**2,931**	**2,917**	**2,946**	**2,807**
Heifers over 24 months	278	235	255	244	176
Heifers 12 to 24 months	836	769	811	752	697
Heifers under 12 months	813	796	744	767	786
Bulls over 24 months	22	26	23	12	13
Bulls under 24 months	38	36	35	42	52
Beef animals over 12 months	95	139	211	153	119
Beef animals under 12 months	135	170	152	149	181
Other	32	50	47	49	47
Total	**5,139**	**5,152**	**5,195**	**5,114**	**4,878**
Milk sold to Jersey Milk (Litres)	12,712,000	12,613,000	13,374,000	14,005,000	13,886,000
Gross value of milk & milk product sales (£)	11,627,000	11,919,000	12,699,000	14,014,000	13,732,000

*Amended

Table 16: HERD NUMBERS AND SIZE – Registered producers

Classification of Herd (cows and heifers in milk)	**2011**		**2012**		**2013**		**2014**		**2015**	
	Herds	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**
1-19	6	65	5	48	4	39	4	45	2	20
20-49	3	114	1	48	1	45	1	38	3	96
50-69	3	188	1	53	3	174	3	176	2	124
70-99	4	357	6	482	4	335	3	245	3	278
100-149	2	242	3	348	3	359	4	480	1	140
150-199	2	356	2	362	2	378	3	581	2	387
200-299	7	1568	7	1590	7	1587	6	1381	8	1762
Total milking animals										
Herds and animals	27	2890	25	2931	24	2917	24	2946	21	2807
Average number cows and heifers per herd	107		117		122		123		134	

Chart 4: Number of herds by size (milking animals)

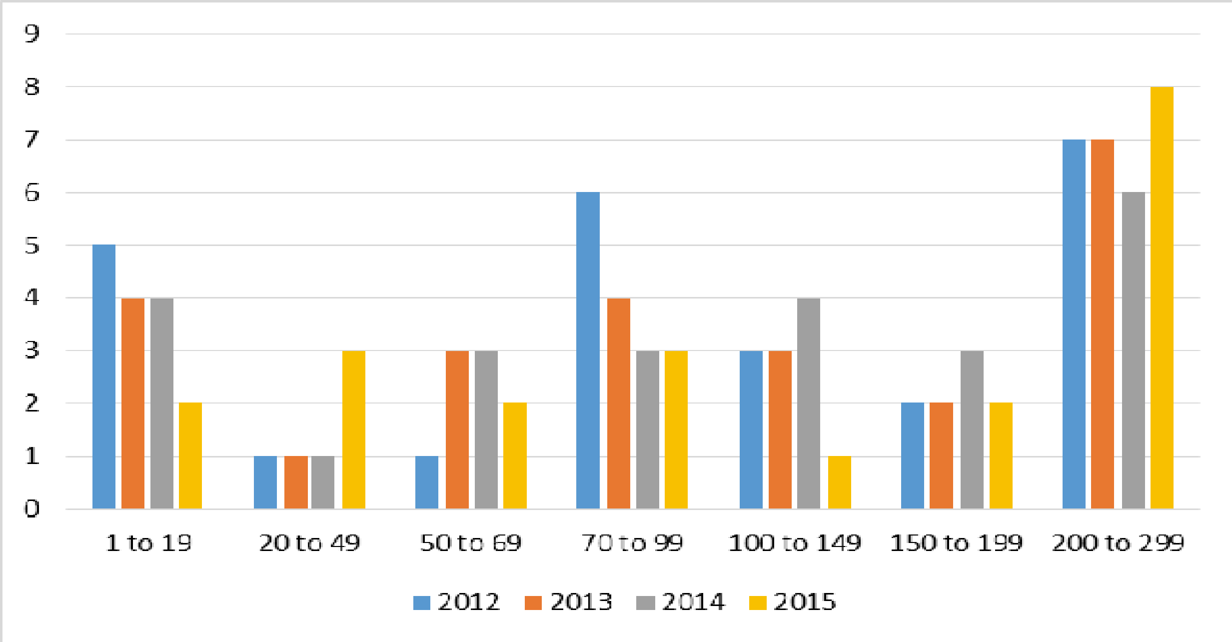

Table 17: OTHER LIVESTOCK

	2011	2012	2013	2014	2015
Pigs					
Sows for Breeding	65	73	45	52	54
Boars in Service	7	7	6	7	8
Other Pigs	355	372	426	312	370
Total Pigs	**427**	**452**	**477**	**371**	**432**
Poultry					
Fowls from 1 day old to the point of laying	1,875	496	641	876	365
No. of laying hens	18,882	25,418	25,800	25,423	27,431
Broilers (for killing up to 10 weeks of age)	30	5	83	NR	NR
Other Chickens	517	570	552	1,051	950
Other Table Fowl (ducks, geese, turkeys)	967	823	851	1,388	628
Total Poultry	**22,271**	**27,312**	**27,927**	**28,738**	**29,374**
Sheep	**972**	**1,042**	**1,135**	**1,253**	**1,015**
Goats	**11**	**20**	**21**	**32**	**37**

Table 18: EQUINE ANIMALS

	2011	2012	2013	2014	2015
Equine					
Horses at Livery	343	315	345	291	317
Horses Owned	478	537*	541	492*	450
Donkeys Owned	25	24	22	23	25
Total Equines	**846**	**876***	**908**	**806***	**792**

* Amended figure

Table 19: GRASS AREAS (vg)

	2011	2012	2013	2014	2015
Grass (at 1st October)					
Total area of grassland	18,895	19,004	19,280*	19,723	19,614
Of which grown to a recognised organic standard	1035*	997	859	640	470
Of which grown as part of organic conversion process	0	0	0	0	0
Area cut for hay					
1st Cut	851	1,178	1,033	960	922
2nd Cut	235	221	212	189	275
3rd Cut	95	40	10	10	10
Area cut for silage					
1st Cut	3,234	3,275	2,217	2,336	2,339
2nd Cut	2,104	1,836	1,657	2,349	2,080
3rd Cut	746	588	569	467	525
Haylage					
1st Cut	655	647	563	635	717
2nd Cut	231	63	100	218	428
3rd Cut	100	66	11	11	54
Forage Maize	2,328	1,891	1,790	1,916	2,089
Other Stock Feed Crops	282	316	423	275	306
Green Manure/Cover Crops	4,855	5,483	3,980	3,789	3,818

* Amended figure

Table 20: CEREAL AREAS (vg)

	2011	2012	2013	2014	2015
Barley (harvested for grain)	670	1,021	498	705	450
Oats (harvested for grain)	61	12	9	231	13
Wheat (harvested for grain)	321	260	116	99	59
Cereals grown for straw only	581	477	440	427	402
Total cereals	**1,633**	**1,770**	**1,063**	**1,462**	**924**