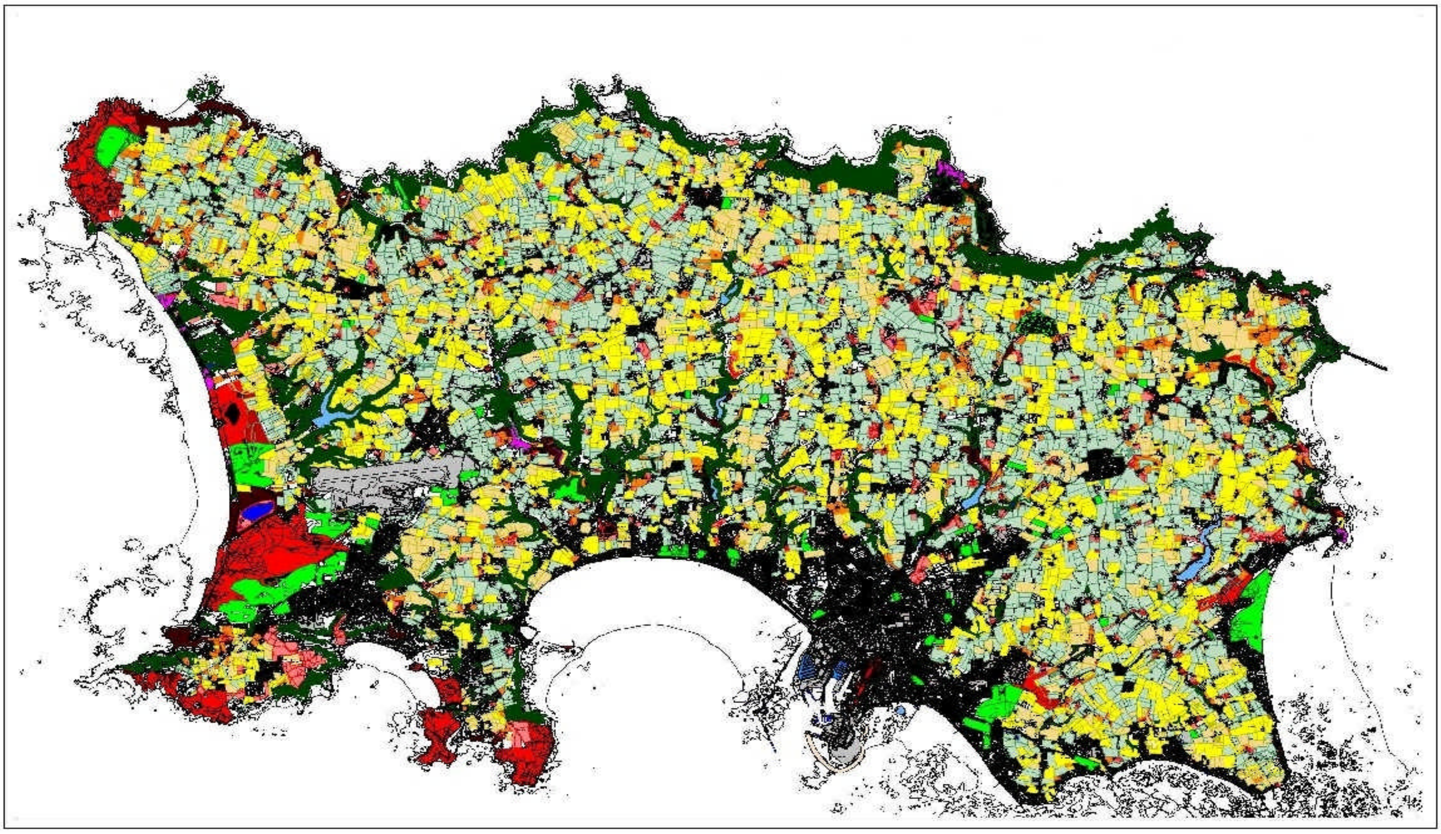
Rural Economy



Agricultural Statistics 2013

Economic Development

States of Jersey

ECONOMIC DEVELOPMENT
AGRICULTURAL STATISTICS FOR 2013

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AGRICULTURAL STATISTICS FOR 2013

Foreword

2013 has seen some major changes in Jersey's agricultural sector. Firstly, the amount of milk sold to the Jersey Dairy increased for the first time in 3 years driven by the development of the high value export trade which is reflected in the rise in the gross value of milk and milk product sales. Secondly, the demand for land to plant cider apple orchards remained strong.

2012 saw the inclusion of mail order and plug plant exports in the annual statistics report for the first time and these were £23.4M, a significant contribution to the rural economy. However the loss of Low Value Consignment Relief (LVCR) in 2012 had a major impact on this sector with exports down to £11.6M in 2013.

Likewise, the total area of outdoor fruit and vegetables saw a reduction from 20,766 to 20,033 vergées, mainly due to the fall in area of Jersey Royal potatoes from 17,992 to 16,397 vergées. Other fruit and vegetables fell by 107 vergées though the area of fruit and vegetables in organic production remained more or less static at 466 vergées. However, maincrop and other potatoes increased by 977 vergées (a 156% rise).

The total organic area now stands at 1,325 vergées which is 44% down on the peak in 2008 and the Department is working in conjunction with the Jersey Organic Association Producer Group to implement the agreed Organic Action Plan.

Milk sold to the Jersey Dairy went up from 12,613,000 litres to 13,374,000 litres an increase of 6% and the gross sales value of the milk and milk products rose from £11,919,000, 94.49 pence per litre (ppl) to £12,699,000, 94.95 ppl. The main growth was in the UK marketplace particularly with UHT milk products such as soft-mix ice cream. New markets have also being developed for UHT milk in Hong Kong with China a potential for the future. Jersey Dairy is continuing to develop a value-added export market and this effort is continuing to improve financial returns from the market place.

The growing demand for cider and apple brandy is still driving the demand for planting cider orchards, and the area of land used for top fruit now stands at 199 vergées.

2013 was a difficult season for the Jersey Royal industry with one of the worst winters on record, made worse by the exceptional snow in March. This delayed plantings and stretched out the planting period incurring additional costs to the growers. It also delayed crop maturity which had an effect on the marketing. This resulted in slightly lower exports of 28,417 tonnes (171 tonnes lower than 2012) though a higher total gross return of £27.5M (£969/t) was achieved from the market.

The overall value of crop exports has fallen from £53.3M to £42.1M mainly due to the loss of LVCR and to a lesser extent, the impact of a difficult growing season.

Deputy Carolyn Labey
Assistant Minister Rural Economy

AGRICULTURAL STATISTICS FOR 2013

This document summarises selected information collected from the agricultural returns completed in October 2013 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 2013 data.

Table 1: AGRICULTURAL STRUCTURE (revised table)

Area of Jersey = 64,612 vergées	**2009**	**2010**	**2011**	**2012**	**2013**
Land areas					
Owned and farmed	9,107	9,306	9,072	9,034	8,536
Rented	28,029	27,100	27,797	27,970	26,893
Total	**37,136**	**36,406**	**36,869**	**37,004**	**35,429**
Land Percentage					
Area of agricultural land (% of Island area)	57.5	56.3	57.1	57.3	54.8
Land Owned (% of agricultural land)	24.5	25.6	24.6	24.4	24.1
Land Rented (% of agricultural land)	75.5	74.4	75.4	75.6	75.9
Number of holdings [2*]					
1 - 10 vergées	307	286	270	268	256
Above 10 < 25 vergées	134	125	120	121	130
Above 25 < 50 vergées	59	62	65	56	55
Above 50 < 75 vergées	25	27	24	22	22
Above 75 < 100 vergées	8	5	7	7	7
Above 100 < 250 vergées	24	26	24	28	27
Above 250 < 500 vergées	15	16	17	13	13
Above 500 < 1000 vergées	11	6	7	9	7
Above 1000 vergées	3	5	5	5	6
Total	**586**	**558**	**539**	**529**	**523**

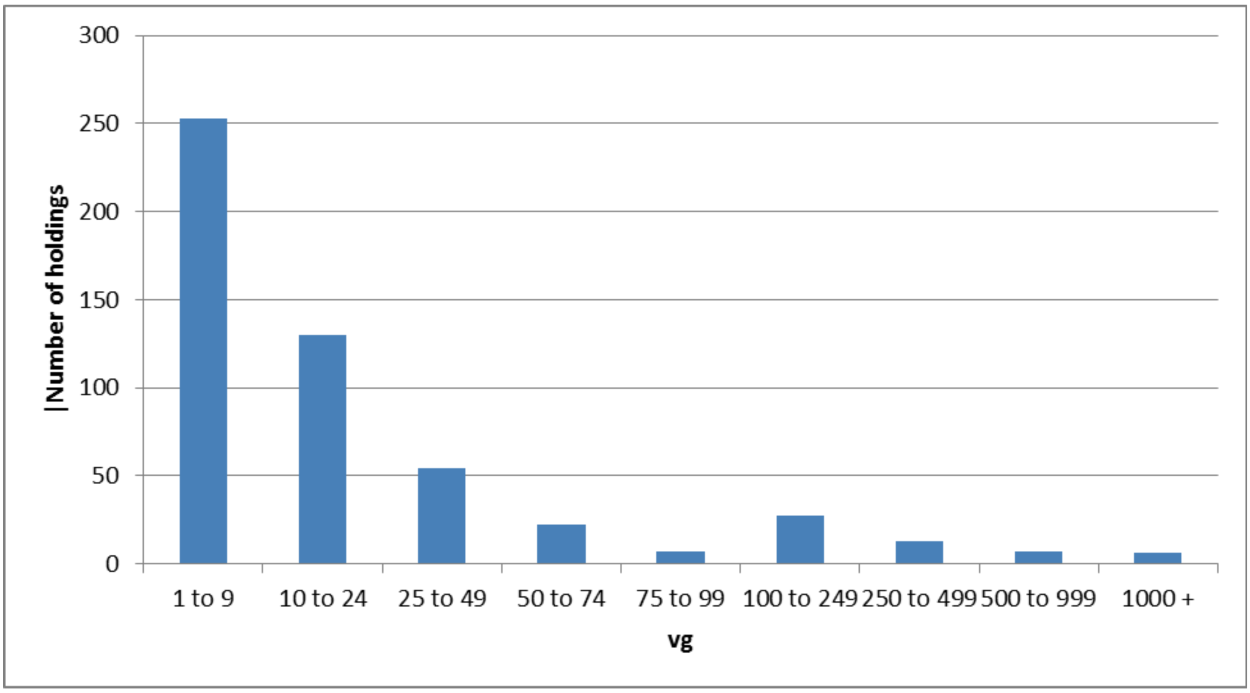
[1*] **Not recorded**

[2*] **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	2009	2010	2011	2012	2013
Average size of holding (vergées)	63	65	68	70	68
Area irrigated (vergées)	1,615	1,782	2,302	1,613	1,978
Uncultivated land (vergées)	2,064	2,002	1,832	1,734	1,831
Uncultivated land as a % of agricultural land	5.6	5.5	5.0	4.7	5.2

Chart 1: Number of Holdings* 2013 – 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	256	2
Above 10 < 25 vergées	130	7
Above 25 < 50 vergées	55	11
Above 50 < 75 vergées	22	8
Above 75 < 100 vergées	7	2
Above 100 < 250 vergées	27	26
Above 250 < 500 vergées	13	13
Above 500 < 1000 vergées	7	5
Above 1000 vergées	6	6
Total	**523**	**80**
Total agricultural area (vg)	**35,429**	
Area on which SAP & QMP claimed (vg)		**27,249**
Area subject to SAP & QMP		**77 %**

* 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. The SAP may exclude certain Countryside Enhancement Scheme (CES) elements where there is no economic production (e.g. buffer zones) as the payment rate for these CES components includes the loss of the SAP.

Quality Milk Payment

Dairy farms receive an additional payment which amounted to £168 per cow per in 2013.

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 *

Farm Labour	2009	2010	2011	2012	2013
Whole Time	684	714	669	635	592
Part Time	191	210	205	188	196
Seasonal or Casual Workers	910	863	1073	837	875
TOTAL	**1,785**	**1,787**	**1,947**	**1,660**	**1,663**

* Peak Season

Farm Labour

Full time employees showed a decrease of 7% to 592, part time staff, seasonal and casual workers all increased by 4%.

Chart 2: Vegetable and Flower Exports (% value)

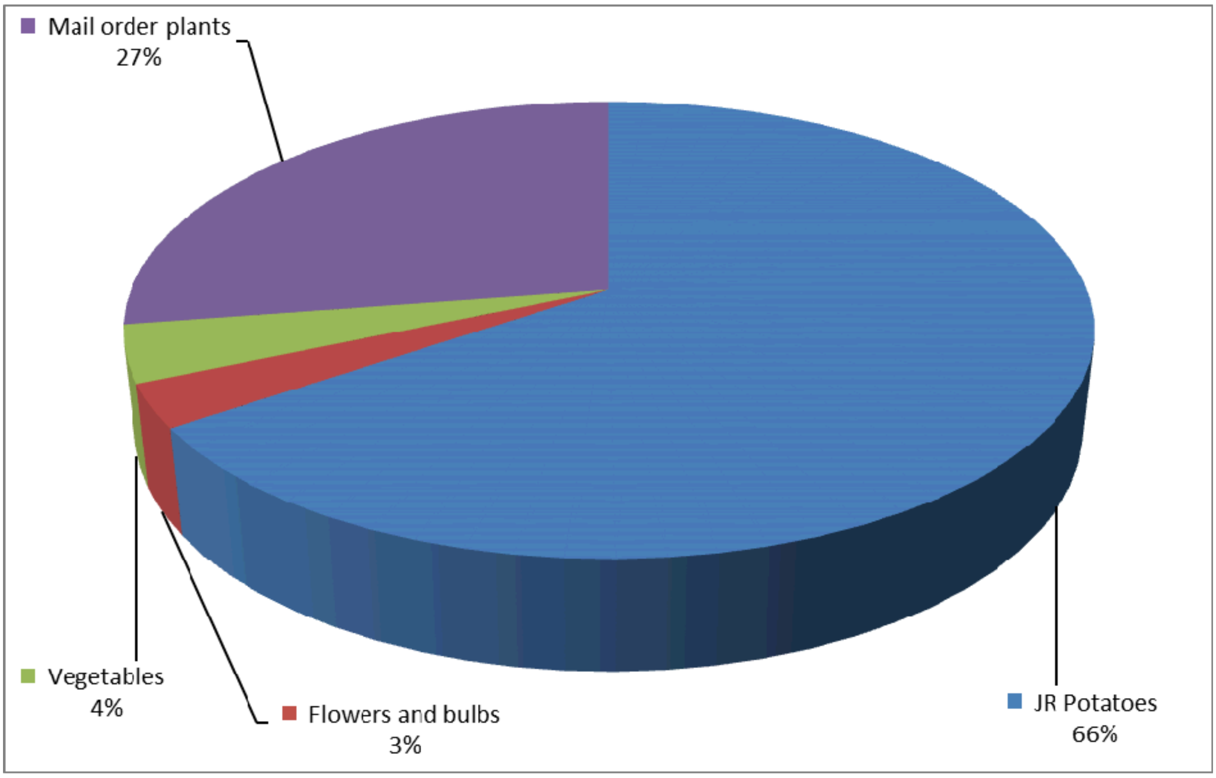


Table 5: VEGETABLE EXPORTS

	2009		2010		2011		2012		2013	
	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)
Beans	74	125,017	44	58,324	26	33,823	5	8,410	14	13,322
Cauliflower	68	108,982	55	96,491	58	97,974	22	38,878	20	34,498
Courgettes	1,001	789,511	591	584,106	524	423,902	569	489,308	436	393,728
Potatoes	37,631	27,141,633	30,478	31,449,761	30,890	30,837,079	28,588	27,008,402	28,417	27,545,279
Protected Cropping	349	256,093	238	199,556	264	206,923	192	174,815	119	231,907
Others	408	400,354	780	781,644	1,074	1,154,219	905	1,162,108	848	1,029,142
Total vegetables	**39,531**	**28,821,590**	**32,186**	**33,169,882**	**32,836**	**32,753,920**	**30,281**	**28,881,921**	**29,854**	**29,247,876**

*1 Not recorded

*2 Not available, included in protected cropping exports

Table 6: FLOWER EXPORTS

	2009		2010		2011		2012		2013	
Flowers	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**
Anemones	NR	NR	111	2,692	246	3,720	4	16	NR	0
Lilies	2,781	78,218	5,701	160,733	12,479	277,106	1,762	44,168	1,715	33,162
Narcissus Flowers	48,727	685,975	52,593	875,955	56,730	722,311	44,542	632,072	69,947	971,565
Pinks	469	8,410	283	5,785	NR	NR	NR	NR	NR	NR
Others	236	8,423	NR	NR	110	5,218	NR	NR	NR	NR
Sub total flowers	**52,213**	**781,026**	**58,688**	**1,045,165**	**69,565**	**1,008,355**	**46,308**	**676,256**	**71,662**	**1,004,727**

Table 7: BULB AND TOTAL EXPORTS

Narcissus Bulbs (t)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)
Sub total bulbs	803	402,537	753	340,719	617	399,101	470	328,163	384	286,383
Mail Order (Plug Plants etc)*	NR	NR	NR	NR	NR	NR	NR	23,414,013	NR	11,539,579
Total flowers and bulbs		**1,183,563**		**1,385,884**		**1,407,456**		**24,418,432***		**12,830,689**
Total value of all crops		**30,005,153**		**34,555,766**		**34,161,376**		**53,300,353***		**42,078,565***

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

Outdoor Crops

Potatoes

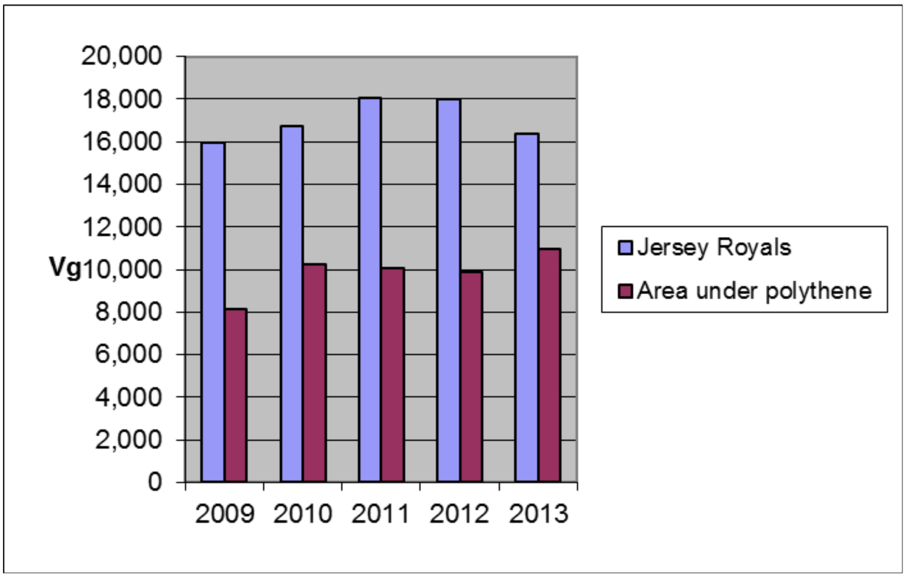
Table 8: POTATO AREAS

Vergées	2009	2010	2011	2012	2013
Potatoes					
Jersey Royals	15,969	16,745	18,048	17,992	16,397
(Jersey Royals under polythene)	(8,143)	(10,240)	(10,032)	(9,880)	(10,993)
Autumn Earlies	508	400	217	51	40
Other potatoes (incl. maincrop)	933	925	708	627	1,604
Total all potatoes	**17,410**	**18,070**	**18,973**	**18,670**	**18,041**

Area
The area of early Jersey Royal potatoes decreased 9% from 2012 to 16,397 vergées in 2013. The autumn early decreased by 22% though the area of main crop increased by 156% to 1,604 vg.

Production
Exports decreased by 171 tonnes, with gross returns up by £0.5M. The gross return per tonne increased from £945 per tonne to £969 per tonne, a rise of 3%.

Chart 3: Area of Jersey Royals covered with polythene



The use of polythene increased from 55% to 67% of the total area grown.

Table 9: OUTDOOR FRUIT AND VEGETABLE CROPS (Vergées)

	2009	2010	2011	2012	2013
Beans	96	47	16	14	9
Brussels Sprouts	76	96	51	44	47
Cabbage	150	226	287	397	403
Calabrese					
Spring Planted	48	169	138	103	112
Autumn Planted	43	59	29	39	24
Carrots	161	146	139	110	122
Cauliflowers					
Summer and Autumn (maturing before 31.12)	82[1*]	161	121	62	60
Winter (maturing after 31.12)	163	180	93	93	90
Courgettes	388[2*]	349	276	256	245
Leeks	139	227	257	188	129
Lettuce	187	129	106	80	78
Onions	37	35	22	25	29
Parsley	43	17	25	26	7
Soft and cane fruit (other)	42	39	42	48	50
Strawberries	38	39	32	34	33
Tomatoes	1	7	8	0.3	5
Top Fruit	152	161	176	192	199
Other	525	480	451	386	350
Total Outdoor Fruit/Vegetables	**2,371**	**2,567**	**2,269**	**2,096**	**1,992**
Total Outdoor Fruit/Vegetables (including potatoes)	**19,781**	**20,637**	**21,241**	**20,766**	**20,033**
Of which crops grown to a recognised organic standard	854	768	465	447	466

1* Summer/autumn from 2009
2* Total courgettes from 2009

Vegetables

Beans
Beans declined from 14 vergées to 9 vergées a decrease of 36%.

Cabbage
The area increased by 2% to 403 vergées.

Carrots
There was an increase in area from 110 vergées to 122 vergées, up 11%.

Cauliflowers
Summer and autumn cauliflowers decreased from 62 vergées to 60 vergées a fall of 3%. The winter crop decreased from 93 vergées to 90 vergées a fall of 3%.

Courgettes
Courgettes decreased by 4% from 256 vergées to 245 vergées.

Leeks
Leeks decreased in area from 188 vergées to 129 vergées a decrease of 31%.

Lettuce
The lettuce area further declined from 80 vergées to 78 vergées a decrease of 2%.

Onions
The onion area rose by 16% to 29 vergées.

Parsley
The parsley area fell by 73% to 7 vergées.

Fruit Crops

Strawberries
Strawberries fell by 3% from 34 to 33 vergées.

Other soft and cane fruit
Other soft and cane fruit increased from 48 to 50 vergées, up 4%.

Top fruit
The top fruit area still continues to increase and now stands at 199 vergées up 4%.

Summary

The total area of outdoor fruit and vegetables saw a further fall, 5%, from 20,766 vergées to 20,033 vergées. Jersey Royal potatoes decreased by 1,595 vergées, though other potatoes (including maincrop) increased by 977 vergées (a 156% rise) and other fruit and vegetables fell by 105 vergées.

The area of fruit and vegetables in organic production remains static in contrast to continued growth within the organic sector in Europe, but fared better than the UK which saw the land area under organic production fall by 7.3%.

Table 10: OUTDOOR FLOWER CROPS (Vergées)

Narcissi	2009	2010	2011	2012	2013
First Year Second Year Over 2 Years	324 342 155	349*[1] 355 79	327 323 70	545 315 90	352 421 107
Total	**821**	**783**	**720**	**950**	**880**
Other	74	61	60	55	32
Total Outdoor Flowers	**895**	**844*[2]**	**780**	**1,005**	**912**

*[1] Revised figure, previously 418 vg, *[2] previously 913 vg

Flower Crops

Narcissus
First year plantings down 35% at 352 vg, the second year crop area was up 106 vg and 2 year plus crops up 17 vg. The total area under production was down 7% at 880 vg.

Other
The remaining crops were down at 32 vg and accounted for 4% of the outdoor flower area.

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Protected Crops

Table 11: GLASSHOUSE AREAS (m^2)

	2009	2010	2011	2012	2013
	m^2	m^2	m^2	m^2	m^2
Glasshouses under 5 years	1,300	1,300	7,034	7,022	6,088
Glasshouses 5 - 10 years	20,925	16,135	16,994	14,510	1,234
Glasshouses 10-15 years	73,011	41,222	49,411	51,869	38,681
Glasshouses over 15 years	235,413	247,931	224,039	217,655	229,803
Total area of glasshouses	**330,649**	**306,588**	**297,478**	**291,056**	**275,806**
Of which:					
Area heated	97,939	120,049	101,595	90,515	117,056
Area not cropped in last 12 months	79,746	82,629	44,107	41,875	40,887
% not cropped of production area	24.1	27.0	14.8	14.4	14.8

Glasshouse Areas

The total glasshouse area fell a further 5% to 275,806 m^2. The area of heated glass rose by 29% and the % area of glass not cropped increased by 3%.

Table 12: GLASSHOUSE CROPPING (m^2)

	2009	2010	2011	2012	2013
Glasshouse	m^2	m^2	m^2	m^2	m^2
Tomatoes: Planted before 1st February	24,136	19,528	19,528	18,929	21,713
Planted after 1st February	10,758	8,500	28,620	9,566	8,673
Total tomatoes	**34,894**	**28,028**	**48,148**	**28,495**	**30,386**
Beans	7,340	4,538	5,122	1,865	1,864
Cucumber	10,726	8,750	9,257	9,049	10,578
Peppers	6,890	11,584	11,299	12,361	11,383
Potatoes: Planted before 1st November	17,471	102,166	104,845	87,382	69,223
Planted after 1st November	25,845	11,475	8,624	15,505	10,180
Strawberries	17,652	16,891	16,698	12,051	6,579
Others	23,550	13,501	12,052	35,719	12,846
Total fruit and vegetables	**109,474**	**168,905**	**167,897**	**173,932**	**122,653**
Sub-Total (Fruit, vegetables & tomatoes)	**144,368**	**196,933**	**216,045**	**202,427**	**153,039**
Ornamentals					
Bedding Plants	94,242	95,094	117,029	97,844	42,214
Pot Plants	5,607	11,794	3,946	856	456
Others	11,290	13,036	5,064	6,645	21,232
Sub-Total (Ornamentals)	**111,139**	**119,924**	**126,039**	**105,345**	**63,902**
Total (Glasshouse production)*	**255,507**	**316,857**	**342,084**	**307,772**	**216,941**

* Includes double cropping

Glasshouse Cropping

Tomatoes
The area of tomatoes planted before the 1st of February increased from 18,929 m^2 to 21,713 m^2 a rise of 15% though the area planted after the 1st of February decreased by 9% to 8,673 m^2, giving an overall rise in tomato production of 7%.

Potatoes
Potatoes planted before the 1st of November decreased by 21% and the later planted crop decreased by 34% to 10,180 m^2 resulting in an overall decline of 23%.

Strawberries
The strawberry area fell by 45%.

Beans
Beans were static at 1,864 m^2.

Sweet Peppers
The area grown, decreased by 8% to 11,383 m^2.

Ornamentals
Other ornamentals increased by 219% to 21,232 m^2.

The overall ornamental production decreased from 105,345 m^2 to 63,902 m^2.

Table 13: POLYTHENE TUNNEL AREAS (m^2)

	2009	2010	2011	2012	2013
	m^2	m^2	m^2	m^2	m^2
Area of Multi Span	101,599	106,853	107,039	109,088	104,578
Area of Single Span	84,504	85,029	86,121	64,686	59,112
Total area of polythene tunnels	**186,103**	**191,882**	**193,160**	**173,774**	**163,690**
Of which:					
Area heated	48,108	46,853	53,631	33,859	34,114
Area not cropped in last 12 months	16,243	11,523	13,670	19,484	17,603
% of production area not cropped	9	6	7	11	11

Polythene Tunnel Areas

The total area of polythene tunnels decreased, by 6%, to 163,690 m^2. The area of multi-span tunnels decreased by 4,510 m^2 and the area of single spans fell by 5,574 m^2, a fall of 9%. The non-cropped area fell from 19,484 m^2 to 17,603 m, though remained at 11% of the production area.

Table 14: POLYTHENE TUNNEL CROPPING (m^2)

	2009	2010	2011	2012	2013
	m^2	m^2	m^2	m^2	m^2
Vegetables and fruit					
Beans	14,268	7,860	7,392	3,468	3,626
Celery	100	3,998	405	332	480
Courgette	1,496	1,409	40	210	130
Cucumber	840	1,832	790	990	1,020
Lettuce	4,721	2,647	646	1,980	3,116
Sweet Peppers	6,771	5,405	7,092	19,801	21,801
Potatoes	120,276	143,515	146,226	120,061	104,318
Strawberries	200	220	1,520	4,771	4,771
Tomatoes	2,914	4,272	3,240	2,576	3,204
Others	24,839	27,542	32,503	38,277	27,432
Sub-Total (Fruit and Vegetables)	**176,425**	**198,700**	**199,854**	**192,466**	**169,898**
Ornamentals					
Anemones	NR	401	40	40	320
Bedding Plants	14,938	13,019	17,349	11,046	11,305
Freesias	1,180	380	540	352	352
Gypsophila	NR	360	500	NR	NR
Iris	NR	360	540	NR	NR
Lilies	7,690	19,473	25,522	2,712	5,105
Narcissi	NR	4,295	6,233	6,545	7,056
Nursery Stock	7,085	6,382	7,451	8,301	10,031
Pot Plants	5,470	5,540	4,252	920	960
Others	6,710	6,219	1,492	1,426	1,086
Sub-Total (Ornamentals)	**43,073**	**56,429**	**63,919**	**31,342**	**36,215**
Total (Polythene tunnel production)	**219,498**	**255,129**	**263,773**	**223,808**	**206,113**

Polythene Tunnel Cropping

Potatoes: Potato production decreased, by 13% to 104,318 m^2.

Tomatoes: Tomato area increased 24% from 2,576 m^2 to 3,204m^2.

Beans: Bean area increased by 5% from 3,468 m^2 to 3,626 m^2.

Sweet Peppers: Sweet peppers were up from 19,801 m^2 to 21,801 m^2 an increase of 10%.

Ornamentals: Ornamental production increased by 16% to 36,215 $m^{2.}$

Total production: The overall production fell by 8%.

Protected Organic Sector

14,948 m^2 of organic crops were grown under protection of which 7,028 m^2 were Jersey Royal potatoes, no change compared with 2012.

Livestock

Cattle (including the dairy industry) (Table 15)
In 2013 total cattle numbers in Jersey increased by 43 to 5,195 animals (a rise of 0.83%). Cows and heifers in the milking herd have fallen from 2931 in 2012 to 2917 in 2013 a reduction year on year of 0.5%. In the last five years total numbers of milking animals in Jersey have remained relatively static with a high of 2979 in 2009 and a low 2890 in 2011 a total variation of 89 animals or 3%.

Milk production on dairy farms supplying Jersey Dairy has risen for the first time in 3 years to an annual intake of 13,374,000 litres during the milk year ending 31st March 2014 up by 761,000 litres or 6% compared to the milk year ending 31st March 2013. In 2013 there were 23 dairy farms supplying milk to Jersey Dairy a fall of one on the previous year. In addition there is one independent organic dairy farmer processing milk direct for sale to the public through their own farm shop.

The average size of registered dairy herds has increased slightly from 117 cows in 2012 to 122 cows in 2013 the average milk yield per cow has also risen year on year from 4,303 litres per cow in 2012 to 4,585 litres per cow in 2013 an impressive rise of 282 litres per cow or 6.6%. The rise in individual milk output per cow over the course of 2013 can attributed to an increasing number of animals in dairy herds being sired by international sires, the better growing conditions, improved forage quality and dairy farmers wishing to take advantage of the price incentives put in place by Jersey Dairy to increase milk supply in order to meet growing demand for their products.

Herd numbers and size (Table 16)
There are 12 commercial dairy herds holding less than 100 cows in Jersey which in total contain 593 cows or 20% of the Island herd (average herd size 49 cows). There are also 12 herds holding over 100 cows containing 2324 cows or 80% of the Island herd (average herd size 194 cows). The above figures illustrate how the industry is divided between the smaller traditional units and the larger more 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 increased from £11,919,000 (94.5ppl) to £12,699,000 (94.95ppl) a rise in total sales value of 6.5% and in sales value per litre of 0.48%. This increase illustrates the success Jersey Dairy is having in developing a value added export market with product being exported to Hong Kong, India, Japan and potentially other countries in the near future. Continued growth in Jersey Dairies export markets should result in increased milk production, driven by yield per cow based on improved genetics, from the islands dairy herds leading to future improvements in farm income and profitability.

The price paid to conventional producers by Jersey Dairy has risen year on year from 44.7ppl in 2012/13 to 47.0ppl in 2013/14. The above increase in producer prices by Jersey Dairy was paid in recognition of reduced milk output due to the poor weather conditions in 2012/13, high concentrate feed and fertiliser prices and high land rental charges driven by competition from Jersey Royal potato growers. The full effects of these, October 2013, milk price rises will not be seen on farm profitability until the autumn of 2014.

Heifers being reared as replacements for the dairy herd over the age of 12 months have increased by approximately 6% year on year starting to reverse the decline of

10% in 2012. Heifer replacements under 12 months of age have decreased by 52 animals or 16%.

Beef

The import of Aberdeen Angus bull semen in 2008 to inseminate the native Jersey cow has stimulated growth in the production of beef animals for the local market. The Aberdeen Angus genetics has produced cross bred animals which have a better feed conversion, carcase quality and meat yield thus reducing the costs of production and increasing sales value when compared to a pure bred Jersey cattle. The first cross bred animals were slaughtered in 2010 at 24 months old with the meat being well received by the local meat trade and customers who support local production.

The economics of local beef production using the Aberdeen Angus sires would seem to favour future growth in this sector and this is demonstrated by the growth of the number of beef animals registered since 2009. In 2009 there were 121 beef animals recorded compared to the 363 beef animals recorded in 2013 a growth over 5 years of 300%. There are 211 beef animals held on Jersey farms over the age of 12 months however there are only 152 beef animals under 12 months of age which may suggest that the market for local beef carcases has become saturated without the product being stocked regularly by the islands supermarkets

Other Livestock (Table 17)

Poultry

In 2012 the number of laying hens rose steeply to 25,418 up 34.6% year on 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 increase in laying hens in 2012 has been maintained in 2013 with 25,800 birds being recorded.

It has been estimated that over 500,000 broiler chickens are sold in Jersey retail outlets on an annual basis however the economics of small scale local production has proved costly making it difficult for any local producer to make a reasonable return from the market place hence the small number reared. Meat produced from ducks, geese and turkeys has however risen slightly to 851 birds up 3% year on year but is unlikely to increase significantly due to the same economic reasons as broiler production.

Goats

The number of goats in Jersey is very small however there has been a slight increase in their numbers over the last 2 years mainly due to one owner expanding his herd with a desire to start milk production. 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

This was a growing sector in the rural economy up to 2007 however the amount of pigs held on farms has declined steadily from 832 held in that year to 427 in 2011 down 48.7% with only slight increases in numbers in 2012 & 2013. 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. The most significant factor in the number of pigs recorded in 2013 is the number of breeding sows which has declined by 38% to 45 animals. This will result in the number of piglets being born in Jersey declining however this will be offset by the availability of rearing pigs from the UK which have recently been imported.

Sheep

The growth in sheep numbers continued to climb in 2013 with a 9% increase in the overall flock to 1,135. Further increases in sheep numbers in Jersey may be curtailed by the high cost of imported feed and the reduced availability of affordable land with high rental values being driven by potato production.

Equines (kept on farms) (Table 18)

Total equines kept on registered holdings have risen in 2013 to a total of 908 animals up 4% year on year. Horses that are owned, and kept on a holding, have increased from 537 in 2012 to 541 in 2013 a rise of 1% whilst horses at livery have increased by 10% up to 345 animals. Donkey numbers have dropped to a low of 22 animals in 2013.

Rural Economy Strategy

If you are thinking of starting, or increasing, a venture involving farmed livestock advice and financial support is available under the Rural Economy Strategy (RES). Further information can be obtained by contacting the Environment Division on 441600.

Table 15: CATTLE (Numbers)

	2009	2010	2011	2012	2013
Total cows and heifers in milk	**2,979**	**2,970**	**2,890**	**2,931**	**2,917**
Heifers over 24 months	247	244	278	235	255
Heifers 12 to 24 months	686	763	836	769	811
Heifers under 12 months	906	906	813	796	744
Bulls over 24 months	30	25	22	26	23
Bulls under 24 months	44	54	38	36	35
Beef animals over 12 months	78	43	95	139	211
Beef animals under 12 months	43	136	135	170	152
Other	80	63	32	50	47
Total	**5,093**	**5,204**	**5,139**	**5,152**	**5,195**
Milk sold to Jersey Milk (Litres)	12,561,000	12,897,000	12,712,000	12,613,000	13,374,000
Gross value of milk & milk product sales (£)	10,656,000	11,142,000*	11,627,000	11,919,000	12,699,000

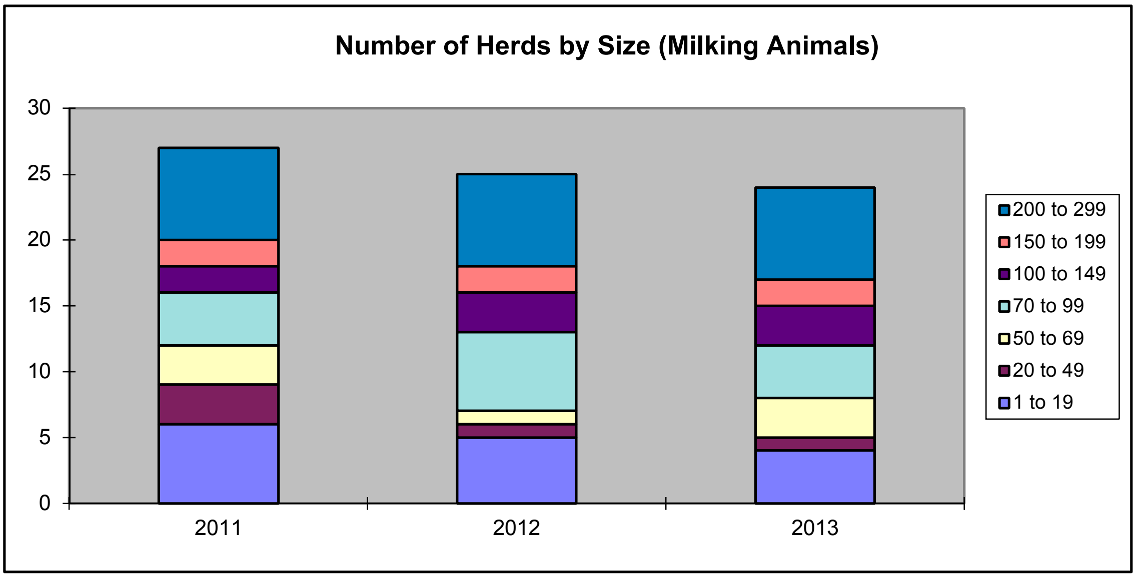
*amended in 2012

Table 16: HERD NUMBERS AND SIZE

Classification of Herd (cows and heifers in milk)	**2008***		**2009***		**2010**		**2011**		**2012**		**2013**	
	Herds	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**
1-19	7	68	5	48	6	60	6	65	5	48	4	39
20-49	5	192	3	101	3	116	3	114	1	48	1	45
50-69	2	124	5	296	3	189	3	188	1	53	3	174
70-99	5	390	5	445	6	533	4	357	6	482	4	335
100-149	2	233	1	129	1	132	2	242	3	348	3	359
150-199	3	545	4	734	2	335	2	356	2	362	2	378
200-299	6	1498	5	1226	7	1605	7	1568	7	1590	7	1587
Total milking animals												
Herds and animals	30	3050	28	2979	28	2970	27	2890	25	2931	24	2917
Average number cows and heifers per herd	102		106		106		107		117		122	

*Registered producers only from 2007. The premises of registered producers are licensed to sell milk for human consumption and are regularly inspected to ensure compliance with current Dairy Hygiene Regulations.

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



*Registered producers only from 2007

Table 17: OTHER LIVESTOCK

	2009	2010	2011	2012	2013
Pigs					
Sows for Breeding	90	80	65	73	45
Boars in Service	10	10	7	7	6
Other Pigs	523	344	355	372	426
Total Pigs	**623**	**434**	**427**	**452**	**477**
Poultry					
Fowls from 1 day old to the point of laying	2,674	1,454	1,875	496	641
No. of laying hens	15,254	18,376	18,882	25,418	25,800
Broilers (for killing up to 10 weeks of age)	460	243	30	5	83
Other Chickens	1,107	1,001	517	570	552
Other Table Fowl (ducks, geese, turkeys)	1,061	958	967	823	851
Total Poultry	**20,556**	**22,032**	**22,271**	**27,312**	**27,927**
Sheep	**861**	**949**	**972**	**1,042**	**1,135**
Goats	**20**	**15**	**11**	**20**	**21**
Other livestock	**816**	**66**	**37**	**2**	**2**

Table 18: EQUINE ANIMALS

	2009	2010	2011	2012	2013
Equine					
Horses at Livery	334	350	343	315	345
Horses Owned	438	503	478	537*	541
Donkeys Owned	29	26	25	24	22
Total Equines	**801**	**879**	**846**	**876***	**908**

*Revised figure

Table 19: GRASS AREAS (vg)

	2009	2010	2011	2012	2013
Grass (at 1st October)					
Total area of grassland	16,241	16,918	18,895	19,004	19,178
Of which grown to a recognised organic standard	1,210	1,242	1035*	997	859
Of which grown as part of organic conversion process	0	0	0	0	0
Area cut for hay					
1st Cut	1,212	962	851	1,178	1,033
2nd Cut	162	183	235	221	212
3rd Cut	0	30	95	40	10
Area cut for silage					
1st Cut	2,068	4,150	3,234	3,275	2,217
2nd Cut	1,379	1,723	2,104	1,836	1,657
3rd Cut	313	571	746	588	569
Haylage					
1st Cut	662	523	655	647	563
2nd Cut	213	145	231	63	100
3rd Cut	46	50	100	66	11
Forage Maize	2,187	2,173	2,328	1,891	1,790
Other Stock Feed Crops	91	193	282	316	423
Green Manure/Cover Crops	4,504	5,045	4,855	5,483	3,980

* Amended figure

Table 20: CEREAL AREAS (vg)

	2009	2010	2011	2012	2013
Barley (harvested for grain)	741	786	670	1,021	498
Oats (harvested for grain)	11	13	61	12	9
Wheat (harvested for grain)	299	184	321	260	116
Cereals grown for straw only	506	720	581	477	440
Total cereals	**1,557**	**1,703**	**1,633**	**1,770**	**1,063**