

Towards Sustainable Farming

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Tourism, Sport and Culture

Department of the Environment

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Executive Summary

Executive Summary

The Jersey countryside is a unique place. The iconic 'Jersey' cow and the Jersey Royal potato play a critical role in Island life, historically, culturally and economically both at the domestic level and internationally. Agriculture provides Islanders with a 'sense of place', with products exported world-wide ensuring that Jersey, the home of these world class brands, has a high profile in the international community encouraging inward investment, tourism, adding value to Jersey products and effectively helping put Jersey 'on the map'.

However, the Jersey countryside is not just about agriculture; parts of Jersey's coast and countryside are considered to be of national and international importance for landscape and environmental quality, with St Ouen's Bay, the north coast and the Island's off-shore reefs falling within the Island's National Park boundary and rightly afforded the highest level of protection against development.

Our inward investment offering is proudly targeted at people who value quality of life; unspoilt beaches with an agrarian hinterland and recognisable character, unique, world-class views and scenery, clean and pure sea air are just as important hooks as the proximity to international business centres, and point to a relaxed lifestyle in a tranquil and secure location where the best bits of our rural environment are generating a value and are protected. There is much to celebrate.

Since the economic crisis in 2008/9, the GVA performance in the agricultural sector in Jersey has been in decline in real terms. More recently, the percentage change in GVA between 2011 and 2015 has been variable, demonstrating in part the volatility of agricultural markets and the weather dependency of the sector. However, whilst 2015 saw a recovery to 92.4% of the 2013 baseline, this is still below levels seen in the 2006 - 2010 RES period. This at a time when, similar to UK farmers, the profitability of the sector as a whole is to a large extent subsidy dependant. Such trends show that serious efforts need to be made to address the **economic sustainability** of Jersey agriculture and to **improve productivity**.

The good news is that collaboration between the Government, farmers and other rural stakeholders is working really well. There is a genuine desire to push through current and future challenges and seize future opportunities as they arise as a team, promoting and demonstrating that sustainability lies at the heart of the Island's rural economy, benefiting both locals and visitors alike.

The new RES will focus on providing measures that consolidate economic growth through encouraging all farms to be 'export ready'. This will be achieved by maintaining key infrastructure such as the continued provision of an **abattoir** and reducing and removing barriers to greater productivity through linkages with a new **Enterprise Strategy**. There will also be investment into **research and development** in **alternative crops** with high value, but reduced environmental impact which break pest lifecycles and the provision of targeted professional advice to promote **skills development**. The RES will protect the agricultural land bank and promote

collaboration in the food chain through new initiatives such as 'Farm Jersey' - an expansion of the Jersey Export Group and defend the Intellectual Property associated with Jersey brands.

The RES will encourage market focused, high value food production through the introduction of a new **Rural Support Scheme**, which incentivises economic and environmental sustainability, through an integrated approach to farming. This will provide customer and consumer with quality assurance and reduces to a minimum, the environmental impact of farming in Jersey through promoting **precision farming** and the provision of business coaching and training. Our aspiration is that by 2019, Jersey could be the world's first jurisdiction to have all farmers LEAF Marque global accredited.

Jersey agriculture is relatively intensive due to the limited land base. As such it is important that Jersey's rural policies also address the issue of **environmental sustainability**, in order to prevent the erosion of those things that make the countryside special and to protect the non-renewable resources upon which the agricultural industry and society depends.

Our traditional rural industries are part of the Island's DNA. It is important not to simply view the value of agriculture to Jersey in purely economic terms. Many public goods and services can be delivered by agriculture beyond food production; with this in mind an **ecosystem services** assessment will be undertaken to determine the true value and benefits of the environment for use in evidence based policy-making decisions, including how better to reward farmers for the public goods and services that they do and they are capable of providing. The assessment will identify and quantify Jersey's 'natural capital' and ecosystem services, identify the providers, which in many cases are, or could be farmers and the beneficiaries of these services and opportunities for enhancement of these public goods.

Examples of public goods enhancement will include the protection and stewardship of natural resources through, for example, the delivery of those elements within the **Water Management Plan** that deal with **agricultural diffuse pollution**, encouraging the provision of measures to achieve a 10-15% reduction target in the use of nitrogen based fertiliser, greater food security, physical and intellectual **access to the countryside**, supporting the **Coastal National Park Management Plan** and the implementation of the Countryside Access Strategy for Jersey and the maintenance of a landscape, which to a large degree makes the Island recognisable as Jersey. The Rural Economy Strategy does not discount the fact that the profile of environmental issues and environmental awareness continues to grow in the minds of the public, consumers, retailers, politicians and the industry alike and as a result, have become economic issues as well.

The new RES will help ensure that Jersey avoids replicating the problems faced by agriculture in the UK and other EU countries where the EU Common Agricultural Policy (CAP) has to a large extent maintained dependence on subsidy, which masks inefficiency and reduces the need for businesses to be market focused. It has

inflated land prices, caused biodiversity damage and declining soil and water quality, through the environmental loading of pesticides and agricultural inputs as well as exacerbating pest and disease issues.

Currently, the contribution of agriculture as a proportion of GVA is 1.2%. The total number of people engaged in agricultural employment fell from 1,947 in 2011 to 1,510 in 2015, a fall of 22%. Full time employees fell from 669 to 525 (22% reduction), part time employees fell from 205 to 120 (41% reduction) whilst seasonal staff fell from 1,073 to 865 (19% reduction).

The area/vg of Jersey Royal potato production fell from 18,048 vergées in 2011 to 15,907 vergées in 2015, a reduction of 11%. However, this is still 26% higher than the low of 2007 which saw only 12,721 vergées planted. Although the potato volume (k tonnes) only fell by 4%, the value (£M) of the exported crop fell by 11% over the same 5 year period, showing a reduction in the gross price achieved per tonne from £997/t to £929/t. Potatoes still accounted for 95% of the value of all exported produce, up from 93% in 2011.

Milk sales increased from 12.7m litres in 2011 to 13.9m litres in 2015, an increase of 9% despite the number of milking animals falling from 2,890 to 2,807 (3% reduction) over the period. The increase in production alongside a decrease in head of milkers is due to the effects of the importation of international Jersey semen/genetics in 2008 which is now having a major positive impact on performance.

There is little doubt that cost-led internal and export markets will continue to be dynamic, unpredictable and challenging places to do business for local farmers and growers. It is therefore imperative that businesses continue to look for efficiencies, manage economic risk and grow their businesses on the basis of best practice, in order to build in business resilience and make sure Jersey agriculture is 'export ready'. In addition, the impacts of **Brexit** are difficult to quantify, however, agriculture and fisheries are a key Brexit work stream, and a sub-group within Government has been established to lead consultation with key stakeholders within the rural economy to ensure that relevant matters are considered in the Brexit dialogue and in discussions between Jersey and the UK.

A mid-term review will provide a good opportunity to assess: the effectiveness of the strategy and progress against policy aims and objectives; allow Government and industry to take stock of the impact and opportunities presented by the outcomes of Brexit negotiations, to consider any recommendations that result from the planned Economic Affairs Scrutiny Panel review; and whether it is necessary to undertake a full economic impact assessment at that point.

Introduction

Introduction

What is the Rural Economy Strategy (RES)?

The Rural Economy Strategy (RES) is a five-year strategy. It is designed to grow the rural economy in line with the objectives of the States Strategic Plan whilst safeguarding Jersey's countryside, its character and the environment. The RES recognises that economic sustainability of the rural sector also depends on providing positive environmental and social benefits.

Why review the Rural Economy Strategy (RES)?

The current RES ended on 31 December 2015 but was extended at the Minister's request whilst the Medium Term Financial Plan was finalised. Regular reviews of the strategy help ensure that the changing needs and requirements of the Island's rural economy are reflected and accommodated in line with market and political changes. This document builds on the 2011-2015 RES to ensure that the changing requirements of the Island's rural economy are addressed, whilst the wider societal requirements relating to the activities and influence of rural businesses are reflected and accommodated.

Rural businesses need a long-term strategy to enable future planning. Clear signals are needed from the Government of Jersey in terms of the amount, type and duration of support that rural businesses may expect. Strategic change is not immediate and takes time to prepare for and 'bed in'. Businesses cannot plan for the future if it is thought that government policies are short-term and likely to change.

The RES 2017-2021 is a joint strategy between the Department of the Environment and the Department for Economic Development, Tourism, Sport and Culture, which reflects the thematic nature of the rural portfolio and was informed by an extensive consultation process with a wide variety of stakeholders. Consequently, the strategy is by necessity a broad ranging document. It sets a framework for decision making and outlines areas for review as well as new policies that are consistent with, or complementary to, other related existing States policies or strategic documents and which are referenced within the document.

As a precursor to the development of the strategy, a service redesign process was undertaken within the Environmental Management and Rural Economy Directorate as part of the Public Sector Reform programme. This was done to ensure that statutory functions were clearly defined, that strategic priorities and synergies across Departments were identified and strengthened and opportunities to restructure teams and budgets were implemented; this document is structured to reflect this order. The redesign process, which was concluded in 2015, identified where delivery could be streamlined and resulted in a 20% staff reduction across the Directorate. There has been a year on year reduction in staff and Directorate budgets totalling £1.7m from 2009-2016 demonstrating that more is being done with less in terms of Departmental overheads.

The RES will be delivered within the Departmental budget limits which have been allocated within the Medium Term Financial Plan until 2019. Consequently, no funding can be guaranteed beyond 2019. As the RES is a five year strategy, it is effectively a 'live' document and it will be necessary to conduct a mid-term review in order to further assess the impact of Brexit, Scrutiny Panel recommendations, consider the need for further economic advice and allocate an appropriate funding package for 2020 and 2021.

Although there are some uncertainties, it is critical that the new RES is implemented at the earliest opportunity in order to provide rural businesses with the necessary clarity around the provision and nature of the financial support package open to them. This is essential for effective business planning and to enable the implementation of policies to deal with urgent environmental priorities such as water quality and pest and disease control. Ministers and officers are confident that the new RES is progressive, does not conflict with other States policies and sets the right direction of travel for the next five years. The Government and the rural sector have agreed to set off on a journey together by proposing a transitional path to a more economically efficient and therefore environmentally efficient outcome for the rural economy. The RES 2017-2021 strikes a good balance between the needs of the rural sector, government and the people of Jersey.

Key Sector Analysis

Key Sector Analysis

Key Trends 2011 - 2015⁽¹⁾

GVA

The GVA of the agricultural sector in real terms is illustrated in Table 1⁽²⁾. A more favourable climate prior to the economic crisis in 2008/9 saw better GVA performance in the sector but since then agriculture in Jersey has seen a GVA decline. 2015 saw a recovery to 92.4%, but this was still below levels seen in the 2006 - 2010 RES period.

2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
111.1	114.5	119.8	126.0	108.5	91.8	89.2	100.0	83.3	92.4

Table 1 GVA (in real terms) of Jersey's agricultural sector 2006-2015

(Values based on 2013 reference value of 100).

Farm Labour

The total number of people engaged in agricultural employment fell from 1,947 in 2011 to 1,510 in 2015, a fall of 22%. Full time employees fell from 669 to 525 (22% reduction), part time employees fell from 205 to 120 (41% reduction) whilst seasonal staff fell from 1073 to 865 (19% reduction).

	2011	2012	2013	2014	2015
Total	1947	1660	1663	1582	1510

Table 2 Total number of people in Jersey in agricultural employment 2011-2015

Total Agricultural Exports

Fruit and vegetable exports fell by 11% over the period 2011 - 2015.

	2011	2012	2013	2014	2015
£ M	32.8	28.9	29.2	31.0	29.2

Table 3 Fruit and vegetable exports (£M) between 2011-2015

1 2016 statistics not yet available

2 Taken from [Measuring Jersey's Economy GVA and GDP 2015](https://www.gov.je/news/2016/pages/GVAandGDP2015)
<https://www.gov.je/news/2016/pages/GVAandGDP2015>

Potato Production and Exports

The area/vg of Jersey Royal potato production fell from 18,048 vergées in 2011 to 15,907 vergées in 2015, a reduction of 11%, however this is still 26% higher than the low of 2007 which saw only 12,721 vergées planted.

	2011	2012	2013	2014	2015
Area/vg	18,048	17,992	16,397	16,836	15,907
£M	30.8	27.0	27.5	29.0	27.6
K tonnes	30.9	28.6	28.4	31.4	29.3
£/tonne	997	944	968	923	929

Table 4 Area/vergée of Jersey Royal Potato production between 2011-2015

Although the potato volume (k tonnes) only fell by 4%, the value (£M) of the exported crop fell by 11% over the same 5 year period, a reduction in the gross price achieved per tonne from £997/t to £929/t. Potatoes still accounted for 95% of the value of all exported produce, up from 93% in 2011.

Narcissus Flowers

Export of daffodil flowers rose from £0.7m in 2011 to £1.2m in 2015, an increase of 47%, with flowers being exported to the UK, Holland and the U.S.A.

	2011	2012	2013	2014	2015
£M	0.7	0.6	0.9	1.0	1.2

Table 5 Export of daffodil flowers between 2011-2015

Plug Plants

Export of plug plants were first recorded in 2012, the year before the loss of Low Value Consignment Relief (LVCR) which, as can be seen by export values below, had a major impact on the sector with two businesses ceasing to trade since then.

	2011	2012	2013	2014	2015
£M	N/R	23.4	11.5	11.8	8.4

Table 6 Export of plug plants between 2012-2015

Other Fruit and Vegetables

The area of other fruit and vegetables grown has remained relatively constant with a slight reduction of 4% over the period in view.

	2011	2012	2013	2014	2015
Area/vg	2269	2096	1992	2174	2171

Table 7 Fruit and Vegetables grown area/vg between 2011-2015

Protected Crops

Glasshouse tomato production continued to decline from 48,148 m² in 2011 to 17,571 m² in 2015, a reduction of 64%. Likewise bedding plant production has fallen by 61%.

Cereal production

Cereal production, primarily for animal feed use, has decreased from 1,633 vergées to 924 vergées, a reduction of 43%. Barley is down 33%, oats down 79%, wheat down 82% and cereals grown for straw down 31%.

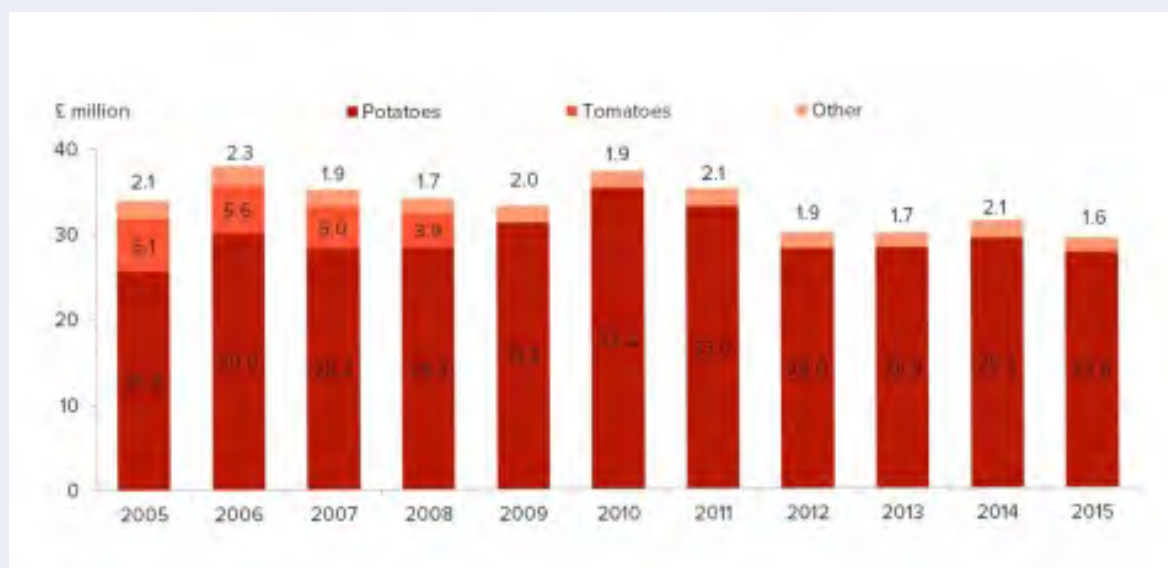


Figure 1 Value of Export Arable Crops 2005-2015 (£ million in 2015 prices)

Livestock and dairy

Milk sales increased from 12.7m litres in 2011 to 13.9m litres in 2015, an increase of 9% despite the number of milking animals falling from 2,890 to 2,807 (3% reduction) over the period. The increase in production alongside a decrease in head of milkers is due to the effects of the importation of international Jersey semen/genetics in 2008 which is now having a major impact on performance.

	2011	2012	2013	2014	2015
Dairy herds	27	25	24	24	21
Milking cows	2,890	2,931	2,917	2,946	2,807
Total cattle	5,139	5,152	5,195	5,114	4,878
Milk (M litres)	12.7	12.6	13.4	14.0	13.9
Milk & products (£M)	11.6	11.9	12.7	14.0	13.7

Table 8 Milk Sales and Cattle Figures 2011-2015

Laying hens

The number of laying hens has seen an increase of 45% from 18,882 to 27,431 between 2011 and 2015.

Sheep

Head of sheep has increased by 4% to 1015.

Arable - Key Sector Analysis

The arable sector remains dominated by the Jersey Royal Potato which accounts for 95% of the value of all fruit and vegetable exports or 70% of all crop exports if mail order and plug plants are taken into account. The plug plant mail order sector is the second major crop exporter, accounting for £8.4m (21%) of the total export value.

Becoming more noticeable is the increased mechanisation in Jersey Royal production as growers shift to nematicide control products that prohibit hand planting. Also, with product limitations identified by the Audax report⁽³⁾ and in response to the Action for Cleaner Water Group and Water Management Plan guidelines, reductions in fertiliser rates and precise placement techniques are being explored which may also necessitate automatic planting, reducing hand planting on flatter land. On some major potato holdings, automatic planting has risen from 0 to 10% of total area in two or three years.

There is no doubt that hand planting of chitted potato seed is preferable to current automatic methods which damages shoots, delays maturity and reduces yields. However, the increasing cost of labour, staff availability (being dependant on domestic population policy and the impact of Brexit) and retention issues, the minimum wage and the price pressure within the UK market place will all be having impacts on choices around automatic vs. hand planting of potato crops.

The gross price per tonne of export crop has fallen from £997/tonne in 2011 to £929/tonne in 2015. Additionally adverse cold, wet weather at key points early in the years has seriously impacted on the sale of Jersey Royals in the UK and these impacts are likely to escalate if climate change continues as predicted.

The Jersey Royal is also facing increased competition from early potato varieties grown in the Mediterranean region where cost comparison, quality, flavour, appearance, shelf life and supply have all dramatically improved.

Whilst the area of production has fallen in recent years there is still competition between growers and marketing groups for good quality land as crop rotation becomes more important due the rise in Potato Cyst Nematode (PCN) population levels. PCN is a major crop pest capable of causing significant crop damage and economic injury.

3 The Audax Report highlights pesticides less suitable for use in some local situations - report available from the Department of the Environment

Growing Jersey Royals on category 3 and 4 land (high PCN populations) has never been advised, but as more and more land falls into these categories and out of the lower categories, some growers have no choice. Increasing PCN populations coupled with a reduction in the range of protective products means growers are looking for lower category land and trying a range of measures to reduce the level of infestation (see Figure 2 PCN counts 1999-2015).

Brexit is a major uncertainty and could have significant consequences for the Jersey Royal potato, as presently it is protected from imitation within the EU under the Protected Food Name (PFN) Scheme and was awarded a Protected Designation of Origin (PDO) in 1996. The UK does not currently have any comparable legislation in place although there is some suggestion that it is being developed. So, once the UK leaves the EU the protection given under the PFN Scheme will fall away unless a reciprocal arrangement between the UK and EU is put in place. Such an arrangement would also have to be capable of applying to Jersey with its consent in order for the Island to be included in that new relationship.

However, the words and logo 'Jersey Royal(s)' have been protected by a trademark in the UK and Jersey since early 2000 and this should give the Jersey Royal protection within the UK but not in the EU. Application for a trademark within the EU to strengthen this protection may be required if there is no comparable legislation in the UK or if reciprocal agreement between the UK and the EU is not reached.

After potatoes, (which account for 88% of the area of arable crops), the next major crops are cabbage (1.7%) and top fruit (1.5%). There is an argument that Jersey needs to diversify into other crops to spread the risk should serious production or marketing problems arise in the Jersey Royal potato sector: this is one of the reasons why an alternative crops policy is essential.

In light of this, the increase in area planted to top fruit as demand for cider and spirits increases should be seen as positive but some potato and dairy commentators see top fruit (along with commercial liveries) as non-agricultural competition for land that should be restricted, reserving land for the traditional potato and dairy sectors.

The area of land under organic production has fallen and this is being addressed through increased financial support and the implementation of the Organic Action Plan which sets out a number of measures to raise awareness of the benefits of organic growing and of increased co-operation within the sector to promote organic produce.

Dairy - Key Sector Analysis

The Jersey cow, which economically produces commercial quantities of high quality milk and is known for its attractiveness and docility, has been developed by generations of Jersey farmers and exported throughout the world thereby promoting the name and reputation of its Island home.

This iconic brown cow has also had a major influence on the character of the Island's countryside as well as contributing to the quality of life of the Island's population.

The Government believes the most cost effective way of ensuring the Jersey cow remains in its island home, continues to act as an international ambassador for Jersey and has a positive influence on its countryside, is to ensure the dairy industry has an efficient, profitable and sustainable future.

Much has been achieved in the dairy industry over the last decade since the Jersey Milk Marketing Board (JMMB) formulated its 'Road Map to Recovery' in 2005 including:

- The sale of the Five Oaks Dairy and the construction of a new efficient purpose built dairy at Howard Davis Farm
- The importation of international Jersey bull semen to improve farm efficiency and the quality and output of the Island's dairy herd
- The implementation and development of a milk licencing scheme to bring milk output in line with market demand
- The development of a high value export market for dairy products with a provenance based on the quality and reputation of the 'Jersey cow in her Island home'.
- Investment in new and upgraded machinery to widen market opportunities and significantly reduce manufacturing costs
- The reduction of the industry's historical debt levels so reducing repayment and financing costs

These successful developments have enabled the JMMB and its trading arm, Jersey Dairy, to improve their annual financial position from significant losses to a modest level of profitability. If this trend continues, a critical debate will need to centre on what is the right level of profitability to be retained in Jersey Dairy for reinvestment versus improving the milk price to producers, where benchmarking shows levels of profitability are low.

Individual dairy farms have undertaken significant developments but recognise that there are still challenges to be overcome, such as the need to improve farm profitability and to satisfy the local and international market standards and milk quality requirements necessary for increased product shelf life and quality retention.

Farm profitability stubbornly remains below the industry target of an average EBITDA (Earnings before Interest, Tax, Depreciation and Amortisation) of 20% of turnover, which is seen as the point where the industry is considered economically sustainable. However, milk yield per cow has increased from an annual average of 4300 litres per cow (prior to import of international bull semen in 2008) to 5000 litres in 2016, with the top performing herds already approaching 6000 litres per cow. Dairy farmers have invested in bull semen which will continue to drive future yield increases and have retained the resultant replacement young stock with the expectation that the JMMB's international markets will increase to require this extra milk output capacity.

In addition, dairy farmers are now following upgraded 'Rules of Supply' to Jersey Dairy to ensure producers meet international food assurance standards and are ready for international regulatory inspections.

Unfortunately, at a time when the Island's dairy farms are wishing to increase milk output to improve their profitability, these developments have coincided with a downturn in international markets and the world milk price.

In 1955, a year after the establishment of the Milk Marketing Scheme (Approval) (Jersey) Act 1954, which established the Jersey Milk Marketing Board (JMMB), there were 1,009 milk producers in Jersey with an average of 6 cows per herd. Each cow produced an average of 2,125 litres of milk per year and total milk deliveries per annum to the JMMB amounted to 11.96 million litres. In 2016, the number of milk producers in Jersey has fallen to 21 dairy farms (20 supplying milk to the JMMB and one retailing dairy products direct to the Island consumer) with the average herd size having risen to 134 cows with each cow producing an average of 5,000 litres per year and total milk deliveries per annum to the JMMB amounting to 13.89 million litres.

In December 2006, Promar International produced a report 'A sustainable dairy industry in Jersey' which examined the milk industry in Jersey and recommended the formation of a Farmer Controlled Business (FCB). In 2007, the Economic Affairs Scrutiny Sub- Panel report 'Review of the Dairy Industry' recommended 'that a producer co-operative should be formed to replace the existing structure of the Jersey Dairy and the JMMB'. These recommendations are difficult to consider until the industry's Road Map to Recovery' has been completed but this is now nearing completion.

The structural changes detailed above, together with increasing market complexity and Jersey Dairy's development of an international market dimension, highlights the need for the JMMB to review the Milk Marketing Scheme (Jersey) Act 1954 to determine whether the current statutory framework is the most appropriate structure to promote a successful dairy sector going forward.

The Rural Economy Strategy Vision 2017 and beyond

The Rural Economy Strategy Vision 2017 and beyond

The rural economy, in particular the agricultural industry, occupies approximately 68% of the land surface area of Jersey and as such has a fundamental influence on the landscape, wildlife, environment and water resources of the Island. It is imperative that the Government of Jersey produces a strategic vision for the rural sector that ensures stability and certainty, as called for in the Government's Vision Strategy. This vision must recognise its economic, environmental and social importance whilst encouraging rural businesses to plan and develop efficient profitable businesses, managed under good practice guidelines and operated within known and probably reducing levels of States financial aid.

The future vision of Jersey's rural economy is one of sustainable, diverse businesses, less reliant on financial aid, self-supporting and innovative. Professional, efficient enterprises with identified business objectives and risk assessments managed under good practice guidelines based on market focused returns.

Rural businesses must recognise that their future should not be based on a low wage economy and subsidy, and that future investment programmes are required to train staff, develop apprenticeships, increase labour efficiency and improve technical performance, in turn attracting local residents to a career in the rural sector.

The vision is of an industry that embraces its responsibility in the care of our resources and works with Government to support the wider strategic needs of Jersey, in particular as regards food, water security and the quality of the environment.

Sustainability of the Rural Economy

Sustainability of the Rural Economy

The sustainable development of the rural economy cannot be considered in isolation from other areas of the Island's economy. We need to ensure that rural policy helps Jersey's farmers compete in local markets, in traditional export markets and in developing new global markets. It is also important to: protect local land-based skills and to produce crops which meet customer needs; respond to calls for a clear policy on food security; reduce the environmental cost of agriculture in the Island; and ensure the look and feel of Jersey maximises our tourism offering and opportunities so as to encourage inward investment.

The 'big idea' in the Fischler⁽⁴⁾ reforms that brought in the Single Payment in the EU in 2005 was the concept of "decoupling". This meant that support was no longer linked to agricultural production but was simply based on the area farmed. It was designed to make the [Common Agricultural Policy \(CAP\)](#)⁽⁵⁾ more compatible with [World Trade Organization \(WTO\)](#)⁽⁶⁾ commitments, and to allow farmers' production decisions to be based on market influences. This was also the policy direction taken in Jersey, albeit earlier than the EU, with the introduction of the Single Area Payment (SAP). Under the latest round of CAP reform, however, the process of decoupling has taken a step back, with coupled support across the EU increasing.

In spite of farm policy across the EU pushing for greater market focus, farm incomes across the region are under increasing pressure; uncertainty over the CAP, lower output prices and a drop in farm incomes are having a major impact on UK agriculture as is the prospect of Brexit.

The pound has fallen against the euro and the dollar compared to pre-referendum levels. The weaker pound increases competitiveness in export markets and should allow domestic values to rise. On the other hand, it pushes up import costs resulting in increases in input prices and production costs.

4 Franz Fischler was the European Union's Commissioner for Agriculture, Rural Development and Fisheries (1995-2004) who undertook the 2003 reform of the Common Agricultural Policy

5 http://ec.europa.eu/agriculture/cap-history_en

6 <https://www.wto.org>

DEFRA's latest figures for farm profitability, Total Income From Farming⁽⁷⁾, was published on 1 December 2016 and shows that farm performance in the UK declined by 29% between 2014 and 2015.

£Million	2012	2013	2014	2015
Gross output (crops, livestock and other)	24,167	25,885	25,845	24,013
Variable Costs	15,526	16,502	16,031	15,303
Gross Margin	8,641	9,383	9,814	8,710
Capital	4,008	3,985	4,072	3,956
Net Value	4,632	5,397	5,742	4,754
Subsidy - other	3,262	3,338	2,953	2,812
Tax	-121	-118	-96	-92
Total income	7,773	8,618	8,599	7,475
Employees, rent and interest	3,155	3,249	3,359	3,466
Total Income From Farming (TIFF)	4,617	5,369	5,240	4,009

Table 9 [Aggregate Agricultural Accounts: Current price production and income accounts for the United Kingdom](#)

	2012	2013	2014	2015
Profit as % of turnover	19.1	20.7	20.3	16.7
*Subsidy as % of profit	70.7	62.2	56.4	70.1
Subsidy as % of income	13.5	12.9	11.4	11.7

Table 10 Indicators

7 Source: Total Incoming From Farming in the United Kingdom Second Estimate for 2015, 1 December 2016

When comparing Table 10 (UK figures) with Table 11 (Jersey figures), Jersey agriculture is much more volatile as the subsidy as percentage of profit* varies considerably by 26.8% (2011) to 1302.7% (2012). In Jersey, SAP returns show a 75% reduction in profitability from 2011-2015. 2015 did see a slight increase in profitability for the industry as a whole, up from 2.1% to 2.4%, though there was a division between the dairy and other sectors with the dairy sector seeing a marginally better improvement in performance (% profit on turnover up to 6.2% from 5.4%) and though the other sectors saw profitability increase from 1.3% to 1.7% this was in part due to the increase in the amount of subsidy received which accounted for 101% of the profit (but was down from 109% in 2014).

Consequently, any future policy decision on the desirability and deliverability of subsidy to agriculture will have a significant impact on the future of farming in Jersey and its economic, environmental and social contribution to the Island as a whole.

Table 11 is based on businesses claiming SAP and Quality Milk Payment (QMP) and in 2015 these accounted for 78% of the agricultural area in the Island.

In 2014, agriculture represented 1% of the Jersey economy by Gross Value Added (GVA) which represents a total income of £40m. Most of this income is derived from exporting produce, with the vast majority destined for the UK. There is also some limited export of live cattle to the EU (predominantly to the UK) and this is seen as a potential growth market for some livestock producers.

The majority of the total value of Jersey's agricultural sector came from potato production (approximately £29M) and almost all of this produce is exported to the UK. According to the available data, [Jersey Dairy](http://www.jerseydairy.com)⁽⁸⁾ exports are worth approximately £3.4M per annum with 71% going to the UK and 29% to the Far East.

Exports of bulbs and flowers were worth £1.6M in 2015 and are mostly exported to the UK, the remainder is exported outside of the EU. The export value of non-potato vegetable production in 2015 was £1.5M, almost all to the UK. Subsidies provided to the local rural economy are listed in Table 11⁽⁹⁾.

8 <http://www.jerseydairy.com>

9 Taken from [Jersey's Agricultural Statistics 2015](#)

<https://www.gov.je/government/pages/statesreports.aspx?reportid=2356>

Total Agriculture	2011	2012	2013	2014	2015
Total Income	55,354,435	51,657,178	55,080,141	56,293,311	54,376,481
Total Expenses	50,059,846	51,544,442	52,785,911	55,110,254	53,073,926
Profit	5,294,589	112,736	2,294,230	1,183,057	1,302,555
Profit as % on turnover	9.6	0.2	4.2	2.1	2.4
Subsidy	1,418,228	1,468,638	1,386,324	1,340,907	1,352,477
Subsidy as % of Profit	26.8	1302.7	60.4	113.3	103.8
Subsidy as % of income	2.6	2.8	2.5	2.4	2.5
	2011	2012	2013	2014	2015
Dairy					
Income	9,354,212	9,360,819	9,906,128	10,834,049	8,673,759
Expenses	9,070,931	9,370,325	9,657,159	10,247,815	8,133,625
Profit	283,281	-9,506	248,969	586,234	540,134
Profit as % on turnover	3.0	-0.1	2.5	5.4	6.2
Subsidy	707,456	741,148	724,994	691,422	584,075
*Subsidy as % of profit	250	-7,797	291	118	108.1
Subsidy as % of income	7.6	7.9	7.3	6.4	6.7

Total Agriculture	2011	2012	2013	2014	2015
	2011	2012	2013	2014	2015
Other					
Income	46,000,223	42,296,359	45,174,013	45,459,262	45,702,722
Expenses	40,988,915	42,174,117	43,128,752	44,862,439	44,940,301
Profit	5,011,308	122,242	2,045,261	596,823	762,421
% Profit on turnover	10.9	0.3	4.5	1.3	1.7
Subsidy	710,772	727,490	661,330	649,485	768,402
*Subsidy as % of profit	14	595	32	109	100.8
Subsidy as % of income	1.5	1.7	1.5	1.4	1.7

Table 11 Jersey Total Income From Farming (Current Price)

As can be seen a very high percentage of industry profit is dependent on direct subsidy. Additionally it should be noted that there is a large contribution made by indirect subsidy which also benefits the industry (see below). Any changes to the quantum of the direct subsidy regime will have a greater effect on the industry's profitability than changes to the indirect subsidy. Subsidies provided to the rural economy are listed below:

Direct Subsidies

- [Rural Initiative Scheme \(RIS\)](#)⁽¹⁰⁾
- [Countryside Enhancement Scheme \(CES\)](#)⁽¹¹⁾
- Cattle Testing

10 <https://www.gov.je/Benefits/Grants/IndustryGrants>

11 <https://www.gov.je/benefits/grants/environmental>

- Quality Milk Payment (QMP)
- [Single Area Payment \(SAP\)](#)⁽¹²⁾
- Dairy Service Level Agreement
- Jersey Product Promotion Limited (JPPL)

Indirect Subsidies

- Plant Health Service
 - Laboratories - diagnostics, Statutory plant health, Grower advice and training, phytosanitary certificates, research and development, [European Plant Protection Organization \(EPPO\)](#)⁽¹³⁾
- Environmental Protection (+ [National Proficiency Training Council \[NPTC\]](#))⁽¹⁴⁾
- Animal health and welfare
 - States Veterinary support
- Advisory Services
 - Advice (Technical and business), [National Register of Sprayer operators \(NRoSo\)](#)⁽¹⁵⁾ Training, [British Agrochemical Standards Inspection Scheme \(BASIS\)](#)⁽¹⁶⁾ Training
- Brand Protection
 - JPPL, Protected Designation of Origin, Certification (Trade) Marks
- Abattoir, knacker's yard and animal incinerator
- Land Controls
 - Preservation of agricultural land bank and advice

12 <https://www.gov.je/Benefits/Grants/IndustryGrants/Pages/SingleAreaPayment>

13 <https://www.eppo.int/membership>

14 <https://www.nptc.org.uk>

15 <https://www.nroso.org.uk>

16 <https://www.basis-reg.co.uk>

1 STATUTORY FUNCTIONS

1 STATUTORY FUNCTIONS

European / International Links and Issues

Aim SF 1

Protocol 3

Compliance with existing UK/EU trade arrangements.

Policy SF 1

Protocol 3

The Government of Jersey will continue to fulfil its numerous advisory and regulatory activities in pursuance of its obligations under Protocol 3 whilst it remains in place.

Aim SF 2

Brexit coordination

To ensure the Government fully understands the impact of Brexit across all key sectors, has a clear and coherent policy and is in a good position to influence Brexit negotiations.

Policy SF 2

Brexit co-ordination

A core Jersey Brexit team within the External Relations Department will co-ordinate with Ministers, Chief Officers, advisers and officials from all relevant government departments.

Aim SF 3

Brexit dialogue and negotiations

To provide recommendations to inform the core Brexit team of the negotiating stance required for and on behalf of the Island's farming and fishing sectors.

Policy SF 3

Brexit dialogue and negotiations

Consultation with key stakeholders within the rural economy will be undertaken to ensure that relevant matters are considered in the Brexit dialogue and in discussions between Jersey and the UK.

A specific agriculture and fisheries sub-group will be established as a point of expert and specialist advice to engage with stakeholders and Governmental groups.

Aim SF 4

Brexit and Protocol 3

To protect, as far as is possible, the Island's favourable free trade agreement with the EU.

Policy SF 4

Brexit and Protocol 3

The Brexit negotiating stance to be taken by Jersey is that the Island's best interests are served in preserving the substance of the current relationship with the European Union (EU) as set out in Protocol 3 of the UK Treaty of Accession, and of Jersey's relationship with the United Kingdom.⁽¹⁷⁾

17 A full report entitled "[The UK exit from the EU - what it means for Jersey and how we will protect Jersey's interests](#)" issued as R72/2016 can be found on the [States Assembly](#) website.

1.1 Jersey is neither part of the UK or the European Union (EU) but is considered part of the UK Member State for trade in agricultural produce and has a strong relationship with both. The EU relationship is governed by [Protocol 3](#)⁽¹⁸⁾ to the UK's Act of Accession (1972) meaning that although Jersey remains outside of the EU and consequently the Common Agricultural Policy (CAP), the Island is part of the Customs Union and essentially within the Single Market for the purposes of trade in goods, including agricultural products but is a 'third country' (i.e. outside the EU) in all other respects. Jersey is also outside the EU VAT area. For the purposes of trade in agricultural and fisheries products, Jersey is within the EU as a result of Protocol 3, and is part of the UK Member State. Implementation of relevant EU legislation is therefore obligatory. Jersey is outside the EU for the purposes of most environmental legislation but domestic legislation is often based on EU standards. Jersey is not eligible for EU funding but can in principle participate on a 'pay to play' basis. This may be particularly relevant for renewable energy development. This relationship with the EU and UK specifically impacts on the rural economy in the following areas:

- Trade in agricultural products
- Veterinary legislation
- Animal health legislation
- Plant health legislation
- Marketing of seeds and seedlings
- Food legislation
- Feeding stuffs legislation
- Quality and marketing standards

1.2 As a result of the UK-EU Referendum on 23 June 2016, the UK voted to end the country's membership of the EU. The UK will at some point invoke [Article 50 of the Lisbon Treaty](#)⁽¹⁹⁾, after which there will be a transitional period up to two years for the UK and EU to negotiate withdrawal. This two-year period may be extended only if there is agreement between the UK and the other 27 Member States. The UK will also have to negotiate its future relationship with the EU, and this may take longer than two years.

18 <http://eur-lex.europa.eu/legal-content>

19 <http://www.lisbon-treaty.org>

1.3 We welcome the UK Prime Minister's and other UK Ministers' statements that Jersey and the other Crown Dependencies will be engaged in the process. For a complex negotiation of this nature, the UK is establishing a [Department for Exiting the EU \(DExEU\)](#)⁽²⁰⁾ to coordinate preparations, conduct withdrawal negotiations, and to progress parallel negotiations on the new relationship between the UK and the EU. We expect sub-groups to be established on specific themes such as goods, services, public procurement and competition. As part of this process, the UK Government is setting up a framework, coordinated by the Cabinet Office, to keep Jersey, Guernsey and the Isle of Man informed, and to consult us on the relevant matters in the negotiations.

1.4 In the context of trade alone, the vast majority of agricultural produce that is exported from the Island is destined for the UK. On the reasonable assumption that the UK market will remain open for Jersey produce, the agricultural industry would be relatively unaffected if the UK's withdrawal from the EU made exporting to the EU more difficult or costly. Recent growth in exports has been predominantly to countries outside of the EU and so this business would also be largely unaffected.

1.5 Because Jersey is, like the other British Islands, subject to UK Immigration and Nationality Laws, we will need to be closely involved in the progress of negotiations in this area. The majority of people who are registered to work in Jersey work within the tourism, hospitality, retail, agriculture and fisheries sectors and come from within the EU. The Common Travel Area, which comprises the UK, Ireland and the Crown Dependencies, pre-dates the UK accession to the EU and we expect that the UK will remain committed to the maintenance of the Common Travel Area with Jersey and the Crown Dependencies.

1.6 The UK may decide to apply restrictions on immigration and, on the assumption that the Common Travel Area will remain in some form, these restrictions would be expected to apply equally to immigration into Jersey and to have an effect on all sectors of the economy that recruit overseas workers. Consideration is being given as to what measures will be needed to meet industry requirements, particularly in the agricultural and hospitality sectors. We shall continue to work closely with the Home Office and UK Border Force, with whom we have a strong relationship, in order that the needs of the Jersey economy and labour market are met.

1.7 Taking all these current considerations into account, the Government believes that Jersey's best interests lie in preserving the substance of the current relationship with the EU as set out in Protocol 3 of the UK Treaty of Accession, and of Jersey's relationship with the United Kingdom. This is considered to be the overall Jersey objective for Brexit.

20 <https://www.gov.uk/government/organisations/department-for-exiting-the-european-union>

1.8 In the context of the rural economy, the objective will therefore be to retain free trade in goods with the UK and EU Member States including agricultural products (i.e. trade unrestricted by tariffs or quantitative measures, while accepting the need to meet certain standards, such as those relating to specific products or the environment). As a minimum, terms no less favourable than those achieved by the UK should be sought.

1.9 As set out in a report that will be presented separately by the Minister for [Foreign Affairs] External Relations to CoM on Brexit, over the intervening months since the referendum, it has become clear that market access in goods to the EU is likely to be restricted if the UK increases restrictions on freedom of movement of EU citizens into the UK, and that the UK could leave the European Customs Union. The Government of Jersey has therefore, as a matter of prudence, been working on the assumption that a new and favourable trade agreement with the EU may not be negotiated by Brexit day. As a consequence, tariffs and non-tariff requirements could be a feature of Jersey's trade in goods and agricultural products with the EU 27 after the UK withdrawal. Because we do not know at this stage whether a trade agreement will be concluded with the EU, and if so what provisions it will contain, the Government of Jersey will plan for the possible introduction of both tariff and non-tariff elements to trade in goods with the EU 27.

STAFF ONLY

Jersey London Office (JLO) and Channel Islands Brussels Office (CIBO)

Aim SF 5

Jersey London Office (JLO) and Channel Islands Brussels Office (CIBO)

Aim - To maintain and improve representation of the rural sectors at and via the Jersey London Office and the Channel Islands Brussels Office.

KPI = continued contact and recorded secondment between DoE officers and CIBO/JLO.

Policy SF 5

Jersey London Office (JLO) and Channel Islands Brussels Office (CIBO) (EDTSC* & DoE**)

The JLO and CIBO will continue to support the Island's agricultural, fisheries and veterinary authorities on specific issues relating to EU legislation, Protocol 3 compliance and Brexit. The Offices will continue to support ministers, States departments and sectors of the Jersey economy in their interactions with the EU, UK government, parliamentarians, the diplomatic and business communities and wider UK society. The Offices will help ensure that Jersey's position is known and understood by decision-makers and commentators throughout the EU and UK, in defending the Island's interests.

**Department of Economic Development, Tourism, Sport and Culture*

***Department of the Environment*

1.10 Developments within the UK, and engagement with the EU, are relevant for the delivery of a range of rural economy and countryside objectives. [JLO](#)⁽²¹⁾ and [CIBO](#)⁽²²⁾ provide the link between domestic objectives within the Rural Economy Strategy and the external UK/EU context.

STAFF ONLY

21 <http://www.londonoffice.gov.je>

22 <http://www.channelislands.eu>

Provision of Agricultural Advice

Aim SF 6

Provision of Agricultural Advice

To continue the statutory requirement to provide independent agricultural advice to industry and Government.

KPI = new adviser appointed by end Q2 2017

Policy SF 6

*Provision of Agricultural Advice (EDTSC & DoE)

The Government of Jersey will continue to provide a professional agricultural advisory service which is a legislative requirement and provides key competency within Government. The two existing specialist advisory posts in dairy and horticulture will be replaced with a single post in 2017 ensuring professional advice is available to the rural sector. Advice will be tailored to meet statutory, operational and environmental obligations whilst also providing Government with specialist advice on rural and policy issues.

**This policy requires advisory input*

1.11 Historically the Department of the Environment provided advisory services to the agricultural industry supporting the 400+ farmers that existed in the 1960s and mirroring agricultural services provided in the UK.

1.12 Since then, Jersey's agricultural landscape has altered dramatically with approximately 80 agriculturalists now claiming SAP. Reflecting these changes and the Government of Jersey's funding commitments, the service has reduced accordingly although elements of the core advisory service remain. Larger businesses now employ staff to provide husbandry and business advice but smaller farms may be reliant on current Government services or sales orientated advice.

1.13 Departmental cuts in the last decade have resulted in the loss of the following posts: arable and protected research and development (6+ Full Time Equivalent-FTE), protected crop adviser (1 FTE), agricultural inspectors (4 FTE), soil sampler (1 FTE), seasonal inspectors (10), laboratory staff (2 FTE) and the senior scientific adviser (1 FTE), in effect a 70% reduction.

1.14 Current advisory services are delivered by the Head of Plant Health (who has the mixed role of the Government's Entomologist and Assistant Director of Environmental Management and Rural Economy), the Plant Pathologist and the Land Controls and Horticultural Manager, with the Livestock and Dairy Adviser post being vacant (4 FTE). The Livestock and Dairy Adviser retired at the end of 2015 and the Land Controls and Horticultural Manager retired at the end of 2016.

Future provision

1.15 Jersey has statutory obligations with regard to plant and animal health matters and must retain the capability to deliver these and other states strategic aims; protection of natural resources and delivery of public goods. There is now a need to determine what level of service provision should remain within Government. (Note that the Law Officers Department will be reviewing legislation in Jersey in the light of the UK's decision to leave the EU. Any reference to Protocol 3 and EU matters reflects the status quo in 2017 pre-Brexit).

1.16 These services are listed below, broadly separated into (A) statutory responsibilities (retain) , (B) non-statutory services supporting States strategic aims (retain) and (C) services that should be discontinued or re-allocated.

(A) Statutory

- Implementation of local laws:

[Plant Health \(Jersey\) Law 2003](#), [Pesticides \(Jersey\) Law 1991](#), [Agricultural Returns \(Jersey\) Law 1947](#), [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#), [Weeds \(Jersey\) Law 1961](#), [Protection of Agricultural Land \(Jersey\) Law 1964](#), [Animal Welfare \(Jersey\) Law 2004](#), the soon to be enacted [Animal Health \(Jersey\) Law 2017](#), [Agricultural Marketing \(Jersey\) Law 1954](#).

- Compliance with Protocol 3 export requirements - Plant and Animal Health
- Compliance with International Conventions
 - [International Plant Protection Convention \(IPPC\)](#)⁽²³⁾, [Convention on International Trade in Endangered Species of Wild Fauna and Flora \(CITES\)](#)⁽²⁴⁾
- Compliance with statutory pest and disease reporting obligations
 - [EU Plant Health Directive](#)⁽²⁵⁾

23 <https://www.ippc.int>

24 <https://www.cites.org>

25 https://ec.europa.eu/food/plant/plant_health_biosecurity

- Professionally qualified advice (pesticides/fertiliser)
 - [Sustainable Use of Pesticides Directive](#) ⁽²⁶⁾
 - EU Plant Health Regulations
 - [Official Controls Regulations](#) ⁽²⁷⁾
 - Grower training
 - Integrated Pest Management
 - Supermarket protocols
 - Advice to Government - Law revision
 - Advice to Government - Local risk assessments
 - Advice to Government - MRL's
 - Advice to Government - Prosecution (agrochemicals)
- Monitoring, contingency planning and eradication of statutory pests and diseases
- EU Plant Health Directive (Protected Zone Arrangements)
- Provision of Phytosanitary Export and Plant Passport certification
- Diagnostic Service for Inspectorate
- European Plant Protection Organisation Membership (EPPO)
- Management of Agricultural Statistics - Agricultural Returns (Jersey) Law 1947
- Agricultural Land Law enforcement

26 <http://eur-lex.europa.eu/legal-content>

27 <http://eur-lex.europa.eu/legal-content>

- Development of codes of practice, policy and legislation
 - Soil, Air, Water and Pesticide Codes
 - Plant Health Law
 - Pesticide Law
- Competent Authority on Trademark and PDO

(B) Essential Non statutory - Supporting States Strategic Aims

- Advice to Government
 - Action for Cleaner Water Group, Public Health, Pollution Control, Department for Infrastructure (DFI), Planning.
 - Industry overview - Provide critique of industry proposals
 - Industry Reporting & Ministers Questions Without Notice (QWN)
 - Genetically Modified Organisms (GMO) technical advice
- Policy and Strategy Development - key function of Government
- International credibility
- Professional pesticide and fertiliser advice to protect water and environment
- Independent advice to counterbalance industry view
- Research and development to deliver public goods
 - E.g. Alternative crops to reduce impact of agriculture to environment
 - PCN control methods to reduce pesticide use
 - Reduction in nitrogen use
- Soil, water and tissue analysis, manure and PCN
- Business and financial analyses for the Department of the Environment (DoE) and the Department of Economic Development, Tourism, Sport and Culture (EDTSC)

- Planning Functions
 - Planning application analysis and support of proposals.
 - Island Plan Consultation
 - Agricultural capacity register
- Business support functions, business plans, financial analyses etc. for Industry
- Management of Compliance monitoring under all schemes administered
- Scheme Management
 - Single Area Payment (SAP), Rural Initiative Scheme (RIS), Countryside Enhancement Scheme (CES), Service Level Agreements (SLA's)
- Specialist agronomic advice on a wide variety of areas/crops/systems
- Grower training for annual CPD, pest and disease identification
 - Provides an opportunity to educate and influence behaviour to deliver public goods.

(C) Discontinued services

- Commercial pest monitoring - pass to industry.
- Generic / non-specialist business advice - pass to [Jersey Business](https://www.jerseybusiness.je)⁽²⁸⁾.
- Commercial livestock and dairy husbandry advice - to be sourced from private sector after transitional period for dairy sector.

Future Advisory provision

1.17 An advisory service must continue and be consolidated into the Plant Health Laboratory. A succession plan to pass Government of Jersey intellectual property and experience from the incumbent advisors to successors (from current head-count) is vital so capacity is retained as retirement occurs.

1.18 Generic business advice formerly delivered by the recently retired advisers, will be redirected to Jersey Business (assuming staff capacity) as the qualified advisory body, however, Jersey Business lacks specific agricultural expertise; this will be supplied by the new adviser in 2017.

STAFF ONLY

28 <https://www.jerseybusiness.je>

Dairy Sector

1.19 Following the retirement of the current post holder a modest consultancy budget (£30k p/a) has been identified to provide a partial advisory service to Government and the industry but will deliver savings against the employment of an FTE. This service will assist the industry to complete its 'Road Map to Recovery',⁽²⁹⁾ and to a future without the current statutory scheme. In addition, the service will provide expertise on the formation of Government policy and assist Government appointees on the Jersey Milk Marketing Board (JMMB) as required to understand the industry developments, marketing activities and the efficiency developments on the Island's dairy farms.

Agricultural Sector

1.20 The post holder retired at the end of 2016 and succession planning around this post is being implemented with Laboratory and Land Controls staff qualifying as Fertiliser Advisers Certification and Training Scheme (FACTS) advisers with further training to become British Agrochemical Standards Inspection Scheme (BASIS) accredited. It is unlikely that the skills and capacity will be found internally to cover all aspects of this role.

1.21 Following the retirement of the advisers, the posts will be combined and a single adviser will be recruited creating a saving of one post.

STAFF and REVENUE

Structural Reform of the Jersey Milk Marketing Board (JMMB)

Aim SF 7

Structural Reform of the Jersey Milk Marketing Board (JMMB)

To review the current 60 year old statutory framework that regulates the milk sector and implement a more fit for purpose framework that better reflects the modern dairy industry.

29 The Dairy Industry Recovery Plan: Road Map to Recovery. 2004, Jersey Milk Marketing Board.

Policy SF 7

***Structural Reform of the Jersey Milk Marketing Board (JMMB) (EDTSC)**

The Government of Jersey to discuss and agree with the JMMB and dairy producers the most appropriate regulatory structure for the future of Jersey's dairy Industry so that it meets the needs of dairy farmers, consumers and Government within an agreed plan.

**This policy requires advisory input*

1.22 The Jersey Milk Marketing Board (JMMB) was established under the [Milk Marketing Scheme \(Approval\) \(Jersey\) Act 1954](#)⁽³⁰⁾, which to a large degree defines its purpose and structure and created a statutory monopoly in order to, amongst other things, control levels of production and milk quality in the Island. Since that time much has changed both in the Island and elsewhere in the world.

1.23 Since the 1950s, the number of working dairy farms has reduced from approximately 1,000 holdings to 21. As such, it would seem that the time is right to review the way in which the Government and the dairy industry work together to achieve and maintain a sustainable sector into the future and that this requires a new strategic direction and legislative framework to take this forward.

1.24 The strategy for growth set by the [2006 Promar International Report 'A Sustainable Dairy Industry in Jersey'](#)⁽³¹⁾ aka the 'Road Map to Recovery' endorsed by the JMMB over 10 years ago, has taken time to materialise partly due to the need to radically improve the infrastructure of the industry in terms of processing capability and on-farm facilities to meet export standards. Capitalising on these recent investments, the sales and marketing initiatives of added value export dairy products has enabled Jersey Dairy to gain new markets, especially in the Far East. As a consequence, in the last two years sales of low value commodity based products such as skimmed milk concentrate have been virtually eliminated and replaced by Jersey Dairy branded products, such as sales of soft mix ice cream to the UK and UHT milk and butter to Hong Kong, improving average sales value per litre as well as overall dairy profitability; whilst this deliberate policy has substituted low value products with added value branded ones, it has yet to result in an increase in demand for milk.

30 <https://www.jerseylaw.je/laws/revised/Pages>

31 <https://www.gov.je/SiteCollectionDocuments/Government>

1.25 The Dairy Industry Costings Scheme (DICS) is a benchmarking scheme which uses EBITDA as a measure of the operational cash flow of producers supplying Jersey Dairy based on data from the individual farm income statement. EBITDA is calculated by looking at Earnings Before Interest Tax, Depreciation, and Amortisation. Since the distortionary accounting and financing effects on company earnings do not factor into EBITDA, it can be a good way of comparing companies within and across sectors. This measure is also of interest to a company's creditors, since EBITDA is essentially the income that a company has free for interest payments. However, in general, EBITDA is a useful measure only for large companies with significant assets, and/or for companies with a significant amount of debt financing. It is rarely as useful a measure for evaluating small companies with no significant loans.

1.26 Some concern has been raised regarding whether EBITDA as a percentage of turnover is a suitable measure to gauge dairy industry sustainability on the basis that some smaller and/or less developed farms will be unable to deliver the necessary efficiencies and will therefore continue to consistently bring down average performance of the industry as a whole. In addition, EBITDA as a percentage of turnover is a moveable target in that as farm businesses turnover grows so does the margin required to achieve the EBITDA 20% target suggested as the measure of a sustainable industry. A review of the use of EBITDA as a measure of the economic health of the dairy sector is required to consider the best method of identifying and quantifying a sustainable level of economic performance.

1.27 In the last five years dairy farm profitability (expressed as EBITDA as a percentage of turnover) has varied considerably, but remained consistently below the 20% target. This lack of profitability was compensated for by increasing the local wholesale price of milk in 2013, but future price rises are always likely to be controversial in the context of high levels of subsidy. Consequently, future improvements in profitability will need to come from higher milk production driven by exports, improved productivity, efficiencies and industry collaboration.

1.28 In recent times, much has been achieved by the JMMB and Jersey Dairy; whilst dairy commodity prices have made competition in export markets acute, Jersey Dairy branded products have held up well. Product sales into the local market have increased (Jersey Dairy is showing some of the highest levels of profitability for many years) which is a testament to the tenacity and determination of both the industry and Government working in partnership to move the milk sector forward as it moves from a supply to a demand based business model. However, the risks and rewards of this strategy go far beyond what the Government/dairy industry relationship envisaged in the 1954 legislation when establishing the JMMB. A new relationship between Government and industry must be negotiated, supporting the principles of ultimately less statutory control of the sector, the development of higher domestic and export standards, greater market penetration for products in added-value markets and ultimately reduced financial reliance on Government.

STAFF ONLY

Safeguarding the Agricultural Land Bank

Aim SF 8

Safeguarding the agricultural land bank

To support the Island Plan by ensuring that all development is in line with current policy and that valuable agricultural land is not lost to development.

KPI = Land use changes (area leaving agriculture vs. area with agricultural conditions added) recorded and published quarterly.

Policy SF 8

*Safeguarding the agricultural land bank (DoE)

The Government of Jersey will continue to review the Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974 and the Protection of Agricultural Land (Jersey) Law 1964 to explore the possibility of amending or extending the Laws to create general powers to control land use to better protect agricultural land.

**This policy requires advisory input*

1.29 The Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974 was introduced to preserve the agricultural land bank in the Island. The Minister for the Environment can define the type of land use permitted and those eligible to occupy and use the land at the time of transactions.

1.30 The legislation permits the Minister to vary agricultural conditions imposed on the land rather than having to amend the legislation. This in itself is a powerful tool enabling the Minister to react to changing circumstances.

1.31 Under this Law "agricultural land" is defined as land, including land under glass, used or capable of being used for any purpose of agriculture or horticulture, but does not include any dwelling or outbuilding. As such, the imposition of conditions regarding the use and occupancy of agricultural land have the dual purpose of controlling the occupation and use of agricultural land and ensuring that a stable, viable agricultural land bank is retained for the farming industry.

1.32 It is anticipated there will be continuing friction between the agricultural industry, amenity and other users. With a growing population there will be an increased demand for alternative uses such as private equine use, as opposed to commercial liveries and domestic curtilage. As such, there is a fine balance to be struck between being too strict and too light a touch in the interpretation and application of the law. The legislation needs to remain flexible enough to allow the agricultural industry to be adaptable and remain competitive but robust enough to sustain land resources.

1.33 The Rural Economy Strategy (RES) 2011-2015 and The Economic Affairs Scrutiny Rural Economic Strategy Sub-Panel recommended a review of the law to examine the effectiveness and equity of the legislation.

1.34 As a result, a Government and industry working party reviewed the Law to consider the above and make suitable recommendations. The broad conclusions were:

1. The existing legislation should be retained on the basis that it remains fit for purpose
2. The range of agricultural conditions should be reviewed and amended in the context of the current pressures on the agricultural land bank
3. A review of the criteria defining both *bona fide* and smallholder agriculturalists should be undertaken, including the rights of ex-agriculturalists to continue to occupy agricultural land
4. Investigate the options for and the desirability of extending the law to allow for the incorporation of all agricultural land not currently subject to the Law
5. To introduce a register of horses and land used for equine purposes

1.35 The Council of Ministers highlighted the need to investigate alternative strategies to speed up the imposition of controls on the agricultural land bank because, even after 40 years, only approximately 50% of the agricultural land bank is subject to the Law. Land owned by the States, the Crown and the Parishes remains exempt.

1.36 In response it was proposed to extend the Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974 to cover all agricultural land by removing the exemptions in Article 2(5), (b) and (c).

1.37 This presents a number of issues which would need to be resolved:

1. The Minister could refuse to issue a consent where the land was due to be inherited, frustrating the will of the testator and creating a conflict within the legal process
2. It may be inappropriate for the Minister to have the power to refuse consent for a transaction that the Crown or another public body wished to enter into
3. It would take a number of years before all land was covered by the Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974
4. There would be no option to impose additional conditions to land already covered by the 74 Law unless the land was either subject to another transaction or the person with an interest in the land requested it

The Protection of Agricultural Land (Jersey) Law 1964

1.38 The Protection of Agricultural Land (Jersey) Law 1964 (*"the 1964 Law"*), has a much broader scope which is, "for the protection of agricultural land". "Agriculture" is also given a wide definition in Article 1:

"agriculture" includes horticulture, fruit growing, seed growing, dairy farming, the breeding and keeping of livestock, the use of land as grazing land, meadow land, market gardens and nursery grounds; and references to "agricultural land" shall be construed accordingly".

1.39 The prohibitions in Article 2(1) and powers in Articles 3-5, whilst not allowing for conditions to be applied to the land, demonstrate that the Protection of Agricultural Land (Jersey) Law 1964 can be used to control how people use land. Therefore, it may be possible to seek to amend the Law to create a general power to impose conditions and requirements on the general use of agricultural land.

STAFF ONLY

Legislation governing the marketing of agricultural produce

Aim SF 9

Legislation governing the marketing of agricultural produce

To establish control that the Government of Jersey requires in order to regulate exports and so maintain the niche, high value position that the Jersey Royal potato needs to retain in the early potato market.

KPI = relevant laws reviewed and position paper produced end 2018.

Policy SF 9

*Legislation governing the marketing of agricultural produce (EDTSC & DoE)

The Government of Jersey will review the scope of current legislation that might be used in association with trade mark and licensing, to standardise seasonality and quality standards, to ensure that the Jersey Royal potato maintains its position as a high value, niche market product.

**This policy requires advisory input*

1.40 It is recognised that Government should not try to control the agricultural produce market as this is best left to commercial interests. However, both Government and industry have invested heavily in the Jersey Royal potato brand by securing both a Protected Designation of Origin (PDO) and a trade mark. As such, Government has legitimate interest in protecting and enhancing the brand.

1.41 The Government of Jersey defends both the PDO and trademark in the marketplace on behalf of industry and has taken action against a number of companies attempting to use the Jersey Royal brand for their own commercial gain.

1.42 The Jersey Royal industry's drive towards greater productivity and development of the market in the face of increased competition has resulted in a widening range of products which some see as a move away from the high value, niche brand developed since the 19th century.

1.43 The early protected potato crop (glasshouse and polytunnel) may detract from the seasonality of the outdoor grown Jersey Royal, being available before the new season launch, whilst extension of the potato season generally can create cultural problems by forming a "green bridge" for pest and disease development.

Marketing of Agricultural Produce - Agricultural Marketing (Jersey) Law 1953

1.44 Article 16 (1) of the Agricultural Marketing (Jersey) Law 1953 gives the Minister power under The Export of Agricultural Produce (Jersey) Order 1972 to control the export of any agricultural produce from Jersey.

1.45 The Minister can regulate quality, grading, presentation, sizing, containers and labelling. In addition, he can prohibit the harvesting or export of any of the specified produce (calabrese, capsicums, cauliflower, courgettes, parsley, potatoes and tomatoes).

STAFF ONLY

Invasive Non-Native Species (INNS)

Aim SF 10

Invasive Non-Native Species (INNS)

To develop a strategy and legal framework to control INNS to avoid economic injury and environmental damage.

KPI = strategy complete Q4 2018, legal framework in place Q4 2021.

Policy SF 10

***Invasive Non-Native Species (INNS) (DoE)**

The Government of Jersey will develop an INNS strategy highlighting important species for monitoring or remediation. Control of INNS should be achieved through a combination of cooperation, education, conditionality and regulation; a legal frame work must be developed to support the INNS Strategy.

**This policy requires advisory input*

1.46 Invasive non-native species (INNS) are species moved primarily through human action outside their natural range adversely impacting on the habitat of their new location. They may also have an adverse impact on human health or the economy. It has been estimated that of the 12,000 or so alien species found in the European environment, between 10 % and 15 % have reproduced and spread and have had environmental, economic and social impacts. They are estimated to cost the EU at least EUR 12 billion per year.

1.47 Jersey currently has no specific strategy or legal framework under which to act against INNS. The Department of the Environment and other States departments spend increasing resources combatting INNS; Hottentot Fig, a coloniser of cliffs is a common sight in Jersey's south-westerly area and is currently managed by rangers, volunteer groups and specialised, costly rope-access climbers. Japanese knotweed has been present in known locations for a number of years but a recent citizen science survey revealed it to be at approximately 120 sites across the Island. This pernicious species has wrought huge damage in the UK and Europe when left uncontrolled, displacing natural ecology and causing extensive structural and property damage. The Asian Hornet was confirmed in Alderney in July 2016 and measures must be put in place to prevent colonisation of other Channel Islands.

1.48 Terrestrial ecosystems are not solely under threat as freshwater and marine environments are also at risk by recognised INNS; The Chinese Mitten Crab is present in Jersey's waters and in July 2016 a Hybrid Canadian/European Lobster was caught by a local potting vessel.

1.49 In September 2014 the European Parliament and Council adopted a regulation on invasive alien species ([EC Regulation No. 1143/2014 on the Prevention and Management of the Introduction and Spread of Invasive Alien Species](#)⁽³²⁾) to prevent, minimise and mitigate the adverse impacts of the introduction and spread of invasive alien species on wildlife, ecosystem services, human health and the economy.

1.50 INNS are specifically targeted in the [Convention on the Conservation of Biological Diversity](#)⁽³³⁾; target 9 states:

By 2020, invasive alien species and pathways are identified and prioritised, priority species are controlled or eradicated, and measures are in place to manage pathways to prevent their introduction and spread.

1.51 Some INNS are already present in Jersey and action must be taken now to prevent escalation of the problem and costs of mitigation and eradication.

1.52 Due to the increased risk of INNS in a changing climate, strategies should integrate into climate change adaptation action plan measures.

STAFF ONLY

32 <http://eur-lex.europa.eu/legal-content>

33 <https://www.cbd.int/>

Review of the Wildlife (Jersey) Law 2000

Aim SF 11

Review of the Conservation of Wildlife (Jersey) Law 2000

Development and implementation of the updated Conservation of Wildlife Law.

KPI = Completion Q4 2018.

Policy SF 11

Review of the Conservation of Wildlife (Jersey) Law 2000

The Government of Jersey will review the Conservation of Wildlife (Jersey) Law in conjunction with the Planning & Building (Jersey) Law 2002, as the laws work in parallel, to protect the Island's wildlife and habitats.

1.53 Parties to the Convention on the Conservation of Biological Diversity are required by Article 6 to ensure that there are strategies in place to ensure the conservation of wildlife. Such strategies ideally include legislation which protects elements of the jurisdiction's wildlife and habitats.

1.54 In Jersey the legislation to protect wildlife was created in 2000 and in the 15 years since it was implemented numerous inconsistencies and problems have been identified in the legislation, including a lack of prioritisation and insufficient differences in the degree of protection for differing threats to species. Clarification would make the Law more enforceable and the consequences, e.g. on the determination of planning applications, would be improved.

STAFF ONLY

Potato Cyst Nematode (PCN) Control

Aim SF 12

Potato Cyst Nematode (PCN) Control

To retain a Government capacity to direct the monitoring and control of this statutory potato pest.

KPI = 30% of land/year tested by Govt., trends reported locally and to DEFRA annually 2017 - 2021.

Policy SF 12

*Potato Cyst Nematode (PCN) Control (EDTSC & DoE)

The Government of Jersey should maintain its current PCN surveillance and advisory capacity ensuring government and industry remain informed of local trends and new methods of control. Government also has an obligation to report population trends to DEFRA (UK) under the PCN Directive. The modest research capacity should be maintained so that new measures such as biological control with *Solanum sysimbriifolium* are able to be introduced and that alternative crops can be explored.

**This policy requires advisory input*

1.55 The Jersey Royal potato is the Island's main export crop worth approx. £29M annually with up to 1,900 people in related employment. One of the major pests of potato is Potato Cyst Nematode (PCN), a soil dwelling nematode that feeds on potato roots. At high levels it can severely affect yield and quality of potatoes. PCN is a regulated pest under the [PCN Directive](#)⁽³⁴⁾ soil-testing and Jersey is obliged to have a Government led action plan aimed at minimising the spread of the pest.

34 <https://www.sasa.gov.uk/seed-ware-potatoes/nematology>

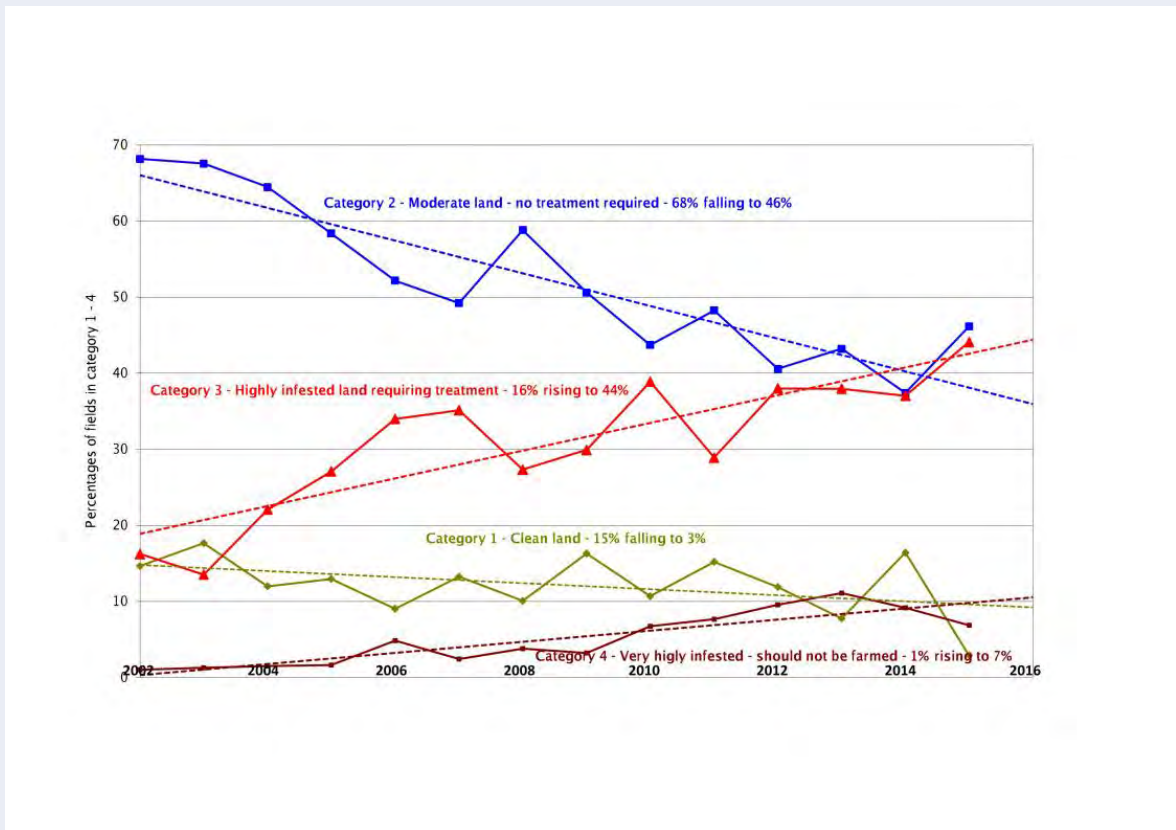


Figure 2 PCN counts 2002-2016.

1.56 Jersey Royal Potato production is unique in its intensity. Much land is cropped annually and some twice per year; no other production area cycles the same crop through the same land so quickly and effective rotation is not practised

1.57 This intensive system has only been possible through PCN control with annual nematicide application but the relatively recent loss of some nematicide products has partially removed the 'crutch' supporting the intensive system; PCN levels continue to increase creating production difficulties in some cases.

1.58 This situation is amplified in times of overproduction when crops are not harvested and ploughed back in or crop debris is dumped back to production land. This creates volunteer (unwanted) potato plants which are not sufficiently controlled allowing further multiplication of PCN.

1.59 Industry has been given clear information for considerable time that the system is considered unsustainable, whilst an ideal system would:

- Use a PCN resistant potato variety - not possible with Jersey Royal
- Practice crop rotation to allow natural pest decline
- Increase organic manure use to enhance soil fungi to reduce PCN levels
- Remove crop debris and control volunteers
- Use a nematicide only if PCN levels rise (each 3- 5 years)
- Clean machinery to prevent transmission between fields
- Only grow seed in PCN free land to prevent spread

1.60 The Government of Jersey must decide what level of intervention, if any, is required in this matter. Improved practice cannot be enforced through current mechanisms, but if there is an appetite for intervention then measures to enforce certain practice could be explored, either through eligibility for States financial support, restrictions on the use of the trademark or restriction through the Agricultural Marketing (Jersey) Law 1953.



Figure 3 Potato Cyst Nematode: cultural control methods are very important

STAFF ONLY

European Plant Protection Organisation (EPPO)

Aim SF 13

European Plant Protection Organisation (EPPO)

To retain EPPO membership and the benefits it brings but explore options to increase membership value.

KPI = Colorado Beetle Campaign completed annually, value addition negotiations complete Q4 2018.

Policy SF 13

*European Plant Protection Organisation (EPPO) (DoE)

The Government of Jersey should explore options to reduce European Plant Protection Organisation (EPPO) membership costs, possibly through a combined Jersey/Guernsey membership, or under the UK membership. Any effort to reduce costs must not compromise the Colorado Beetle Campaign which, aside from its historic, symbolic and international relationship values, provides real term protection for the Jersey Royal potato industry and environment of Jersey.

**This policy requires advisory input*

1.61 The European Plant Protection Organisation (EPPO) is an inter-governmental organisation responsible for European cooperation in plant protection in the European and Mediterranean region. Under the International Plant Protection Convention (IPPC), EPPO is the Regional Plant Protection Organisation (RPPO) for Europe.

1.62 Founded in 1951, EPPO came into existence as a result of collaboration between Jersey, Guernsey and France to rid the Channel Islands of the Colorado Beetle (CB) which had entered and spread unchecked during the WW II Occupation.

Local History - See 'Appendix V: EPPO and Colorado Beetle Local History'



Figure 4 European Plant Protection Organisation logo

Modern Measures

1.63 Today Jersey remains a member of EPPO in its own right at a cost of EUR 24,000/ £18,000 year, gaining access to training, technical information and warnings of pest threats as they arise.

1.64 CB is present in France but not in the UK or Channel Islands. It is classified as an 'Annex IB pest' and its introduction to other regions is prohibited under the [EU Plant Health Protected Zone arrangements](#)⁽³⁵⁾.

1.65 EPPO, the Channel Islands and France continue to conduct the annual Colorado Beetle Campaign with Jersey contributing EUR 4,475/£3,200/year, whilst the French authorities co-ordinate all activities. The work comprises biannual surveys and collection of beetle flight and climate data.

1.66 This action has significantly reduced the level and threat of CB from the Cotentin Peninsula (France) to Jersey with a relatively low level of risk for the last decade and no large scale sea- borne invasions (last observed in 1963, 1977 and 1997)

1.67 French weather stations calculate percentage beetle flight and climatic conditions on a daily basis from 1 May until the end of August and the Channel Islands are alerted to high risk periods triggering beach and crop inspections.

CB in Jersey

1.68 Should Jersey choose to exit EPPO, the CB campaign would lapse, control on the Cotentin Peninsula would reduce and the risk to Jersey would increase.

STAFF & REVENUE

Genetically Modified Organisms (GMOs)

Aim SF 14

Genetically Modified Organisms (GMOs)

To address the current weak regulatory position in relation to the control of GMOs in Jersey.

KPI = measures in place end Q4 2020.

35 https://ec.europa.eu/food/plant/plant_health_biosecurity/protected_zones

Policy SF 14

*Genetically Modified Organisms (GMOs) (EDTSC & DoE)

The Government of Jersey should review its position on the regulation of Genetically Modified Organisms after full consideration of the latest technology, ensuring the Island's agricultural and public views are taken into account.

**This policy requires advisory input*

1.69 Genetically Modified Organisms (GMO's) can be defined as '*any living organism that possesses a novel combination of genetic material obtained through the use of modern biotechnology*' i.e. not produced by traditional breeding but by using techniques that overcome natural physiological reproduction.

1.70 Many jurisdictions have legislation for GMO control but such measures have not been introduced in Jersey. A March 1999 proposition⁽³⁶⁾ was adopted by the Government of Jersey '*to take all possible steps to designate and maintain the Island of Jersey as free from the growing of GMO's*', but as yet no formal legislation is in place and the current position may not stand up to challenge.

GMO and the Jersey Royal

1.71 GMO technology could theoretically reduce nematicide and inorganic nitrogen fertiliser use in the Jersey Royal crop. Factors such as customer acceptance, the UK stance on GMO's (in particular edible crops), brand reputation, alteration of the Jersey Royal genome in the face of the PDO and costs of development would have to be fully considered in any conversation regarding adoption of GMO technology in Jersey.

1.72 Jersey should put in place a legislative framework supporting its position on GMO's and protecting the Island against misuse of its current weak position with regard to powers for preventing GMO use.

STAFF ONLY

36 Deputy A.S. Crowcroft Proposition on Genetically Modified Organisms [P33/99]

2 GOVERNMENT STRATEGIC AIMS

2 GOVERNMENT STRATEGIC AIMS

Multi-Lateral Environmental Agreement (MEA) Commitments

Note - All policies work towards the principles outlined in the [States Strategic Plan 2015-2018 \(SSP\)](#)⁽³⁷⁾ including a reduction in Jersey's carbon and energy footprint.

Aim GSA 1

Multi-Lateral Environmental Agreement (MEA) Commitments

To review MEA commitments, streamline associated work streams and publicise related activities/results.

KPI = meet reporting deadlines.

Policy GSA 1

Multi-Lateral Environmental Agreement (MEA) Commitments

The Government of Jersey will review its current activities under MEAs to ensure compliance with its international responsibilities but in the most streamlined and coherent manner. The work conducted will be publicised to demonstrate the active role the Government of Jersey is taking under these agreements.

2.1 The Multi-lateral Environmental Agreements extended to Jersey through the UK's membership include:⁽³⁸⁾

- The [Rio Convention](#)⁽³⁹⁾ on the Conservation of Biological diversity (CBD) of 257 recognised countries in the world, 198 have ratified the Convention
- The [Bonn Convention](#) on the Conservation of Migratory Species of Wild Animals (CMS), 120 countries have ratified the Convention

37 <https://www.gov.je/Government/Pages/StatesReports>

38 Multi-lateral Environmental Agreements extended to Jersey are listed in 'Appendix I: Multilateral Environmental Agreements and Conventions'

39 <http://jncc.defra.gov.uk/page-1363>

- The [Bern Convention](#) on the Conservation of European Habitats and Species, 168 countries have ratified the Convention
- The [RAMSAR Convention](#) on the Conservation of Wetlands of International Importance, 160 countries have ratified the Convention

2.2 These treaties commit Jersey to the protection of its biodiversity and legislation is translated into policy through the implementation of the Jersey Island Plan 2011. This ensures that habitats and species are protected through a development control regime and the protection of landscape through the designation of the Coastal National Park. The Department of the Environment has a number of specific work streams to meet these obligations including:

Habitat Protection

- The protection of important nature conservation areas by designation as ecological Sites of Special Interest under the [Planning & Building \(Jersey\) Law 2002](#)⁽⁴⁰⁾
- The active management of habitats to ensure that they are returned to favourable ecological condition
- The identification of habitat corridors connecting protected areas
- The conservation and enhancement of trees, woodlands and hedgerows
- Monitoring to ensure that habitats are in favourable condition to ensure sustainable populations

Species protection

- The protection of rare or threatened species through various protection regimes including the Conservation of Wildlife (Jersey) Law 2000
- Wildlife legislation and a working biodiversity strategy are requirements for membership of the Convention on Biological Diversity, Jersey's Strategy was approved in 2000 and is now due for revision. The [Biodiversity Strategy](#)⁽⁴¹⁾ identifies threatened species and the steps required to conserve them

40 <https://www.jerseylaw.je/laws/revised/Pages>

41 <https://www.gov.je/PlanningBuilding/LawsRegs/IslandPlan/Background/Page>

- Some important species are at high risk of local extinction and when pertinent, interventions are made. For example, the Agile Frog, which occurs nowhere else in the British Isles has been returned from the brink of extinction through a collaborative project between the Department of the Environment, Durrell Wildlife Conservation Trust and other UK and local partner organisations

Monitoring

2.3 The Natural Environment Team (NET) co-ordinates and directs most of Jersey's land based (terrestrial) ecological monitoring schemes. These activities ensure that we are aware of the status of key, threatened or otherwise important species, some of which are used as indicators of wider environmental issues. Monitoring ensures appropriate and timely interventions to conserve important species and identifies when local extinction has occurred.

2.4 There are currently around 20 separate surveillance and monitoring schemes either running through the team, independently or in partnership with a large proportion of the scheme being run from a citizen science approach.

Countryside Management

2.5 The Department of the Environment has an ongoing countryside management programme covering 600 Ha (3,300 vg) designed to make areas accessible to the public and improve habitats for wildlife. In recent years it has cleared areas of bracken and Hottentot Fig from publicly administered land helping to restore them to species rich habitats such as scrub and heath.

2.6 The Department is directly responsible for the management of many of the Island's Sites of Special Interest (SSI), which include internationally important areas such as Les Blanchés Banques, Les Landes and Câtél de Lecq. It also administers the management plans and legal protection of sites in private ownership such as Grouville Marsh.

2.7 These areas must be publicly accessible and ecologically enhanced and this is achieved via management and biodiversity plans in conjunction with monitoring programmes. Other commitments include health and safety monitoring, woodland improvement and the preparation of biodiversity plans for landowners and managers.

Land Management

2.8 The Government of Jersey is the Island's largest landowner and much of that land has significant wildlife value. Much is open to public access and is important as a leisure, recreational and tourism resource but requires management to ensure safe access.

2.9 A small team of rangers, critical for maintaining Jersey's open spaces and countryside access network, are responsible for this management, ensuring public access, safety and animal welfare.

Conservation of Wildlife (Jersey) Law 2000

2.10 A key piece of legislation is the Conservation of Wildlife Law (2000) which gives legal protection to a range of species. As well as enforcing this law the NET is responsible for licencing to enable researchers, students, pest controllers and others to work with and handle protected species. Each year the team issues over 200 licences and is responsible for the checks and data gathering associated with them.

Jersey Biodiversity Strategy/Environment in Figures

2.11 As part of Jersey's commitment to the Convention on Biological Diversity, the Department is responsible for the Biodiversity Strategy for the Island. This includes the creation of Biodiversity Action Plans for 67 of the Island's most vulnerable plants, animals and habitats and monitoring programmes which feed into the wider '[Environment in Figures](#)'⁽⁴²⁾ report which comments on the Island's environmental health every five years.

Island Plan (2011)

2.12 The Department of the Environment reviews all new planning applications to assess for any potential impact on managed sites as well as for wildlife and habitats that are covered by the Conservation of Wildlife (Jersey) Law 2000 and the [Island Plan \(2011\)](#)⁽⁴³⁾. In instances where an impact may occur, we liaise with the Planning Department to minimise or to mitigate impact. Additionally, a management plan for Jersey's Coastal National Park was established as part of the Island Plan (2011), assisting the Environment Department in maintenance of a legal register for the Island's Sites of Special Interest (SSIs).

STAFF and REVENUE

42 <https://www.gov.je/Government/Pages/StatesReports>

43 <https://www.gov.je/PlanningBuilding/LawsRegs/IslandPlan/IslandPlan2011>

Supporting business growth and development

Aim GSA 2

Supporting business growth and development

To deliver productivity-led economic growth in the non-financial services sector.

KPI = results reported at mid-term review.

Policy GSA 2

Supporting business growth and development (EDTSC)

The Government of Jersey will produce an Enterprise Strategy and provide a coordinated approach regarding the various business advice and funding providers within Jersey and to ensure they are fully integrated with any future rural support scheme.

2.13 The States Strategic Plan 2015-2018 outlines both the key challenges the Island faces and the Council of Ministers' five priorities - the 'must do's' that can make the biggest difference to Jersey. The SSP includes eight economic thematic outcomes which focus on all sectors of the economy. In order to meet this and other emerging funding challenges Jersey needs economic growth.

2.14 In January 2015 Jersey's independent Fiscal Policy Panel stated:

The challenges of the ageing society and the risks about the future trend rates of economic growth require action now to develop a clear strategy for raising productivity and competitiveness in the Jersey economy in the medium-term.

2.15 The ambition of the Government of Jersey is to achieve environmentally sustainable, productivity-led economic growth, providing rewarding job opportunities and rising living standards across society.

2.16 Productivity is about how well we use our available resources to produce goods and services. Increasing productivity can either produce more goods and services with the same amount of resources or achieve the same levels of production with fewer resources. Increased productivity is not about working longer but working smarter. It's about finding new and innovative ways to do things better. It is also the most likely way to achieve and sustain higher incomes for Islanders in the longer term. This requires innovation, efficiency, good business data and professional advice.

2.17 Technology is also changing our world. It offers real opportunities to drive productivity improvements and also to create new business and employment opportunities. Jersey must embrace technology, particularly as the jobs of the future evolve.

2.18 There is a risk, however, that Jersey's economic growth in the future may not be as good as it needs to be. Productivity will be the key determinant of the Island's future economic growth and therefore government needs to prioritise actions that will deliver this growth by driving improvements allowing the Island to generate better returns from its resources: land, labour and capital. This will require amongst other things, a coordinated approach to advice provision.

2.19 The Enterprise Strategy will provide a framework to deliver productivity-led economic growth in the non-financial services sector. It is set within the context of other key economic policies and avoids duplicating efforts being made elsewhere and describes Government's priorities, guiding future investments and activity, to achieve the aims in the Strategic Plan. It is recognised that resources will be deployed on joint initiatives and delivery partners that will work with businesses within the rural economy to remove barriers to productivity gains.

2.20 Government and delivery partners undertake a range of activities which are designed to support enterprise and will contribute to the overall aim of productivity-led growth. This includes support for entrepreneurs and start-ups, supporting innovation, generic business advice for established firms, business seminars and events such as Enterprise Week.

2.21 Government support will continue to be provided for innovative firms who can make use of new products or processes to become more productive than their counterparts and to grow their market share as a result. This is a key focus of Jersey Business activity and supporting the growth of the best performing firms within each sector can pull up average productivity levels.

2.22 All of this activity is important and can make a wider contribution to Jersey as an entrepreneurial Island. It may create start-ups or grow existing business that could, over the longer term, become successful or high productivity businesses that raise the bar within their sector. While this activity will continue, Government will seek to become more focused over the next three years in how it supports the rural business sector. This focus will primarily be on the three priorities identified as having the potential to make the most significant contribution; improving the productivity of existing firms, supporting the growth of local high-productivity firms and the creation and attraction of high-productivity start-ups and inward investors.

2.23 Whilst the Rural Economy team provides specialist advice and grants through the Rural Initiative Scheme for business development, Jersey Business and Jersey Products Promotion Limited (JPPL) also provide advice and support to businesses.

Jersey Business

2.24 Jersey Business provides a range of advice including start-up, business planning, branding, packaging, identifying skills and training requirements. In addition part of their service provision supports international market development (subject to an approved business plan) which will enable businesses to identify and access funds for market research, including exploratory visits (opportunity for signposting to the Rural Support Scheme - see next section). In future, generic business support will be provided through Jersey Business, although the specialist agricultural element will be provided through the Department of Economic Development, Tourism, Sport and Culture and the Department of the Environment.

Jersey Product Promotion Limited (JPPL)

2.25 JPPL is the umbrella organisation for the Genuine Jersey Products Association (GJPA) and the Jersey Export Group (JEG) aiming to increase sales of local produce, crafts and services and to develop export initiatives for on-Island producers.

2.26 The GJPA raises the awareness of the range and diversity of seasonal produce, local goods and the benefits of buying local. It supports members through training, education, sponsored events, social media and advertising.

2.27 At present there are increasing pressures on many businesses and GJPA helps develop start-up and small businesses in conjunction with Jersey Business and the RIS.

STAFF ONLY

Rural Support Scheme

Aim GSA 3

Rural Support Scheme (a-c)

To incentivise all farms in Jersey to deliver an integrated and sustainable agricultural production model based on world class consumer and customer assurance schemes, in order to increase productivity, reduce the environmental cost of farming and establish Jersey as the first jurisdiction in the world where all farms are LEAF Marque Global Standard accredited..

KPI = Completion Q4 2019

Policy GSA 3

Rural Support Scheme (a)

A new Rural Support Scheme (RSS) will be introduced and developed over the lifetime of the RES.

Tier 1 of the Scheme will employ the Red Tractor audit to ensure all practice is at a basic minimum standard. Tier 2 will provide a higher level of financial support to those businesses who successfully complete the LEAF Marque Assurance Standard. Completion of Tier 2 and a Business Health Check will give access to Tier 3 RIS and CES funding.

Policy GSA 4

Rural Support Scheme (b)

To move away from an internal audit process to an externally provided audit under the LEAF Global Marque accreditation scheme. The benefit being that 100% of scheme beneficiaries will be checked for compliance as opposed to the current 10% and the overhead cost to Government will be reduced.

Policy GSA 5

Rural Support Scheme (c) (EDTSC & DoE)

The Scheme to encourage greater focus on market requirements and best practice in environmental, welfare and food safety standards, enhance business performance through bespoke business 'health checks', increase productivity gains and deliver the public goods required by the Island in a focused and coordinated manner.

Aim GSA 6

Rural Support Scheme (d)

To alter direct financial aid delivery from area based to performance based system using internationally recognised assurance schemes, ensuring delivery of public goods.

KPI = Tier 1 in place end Q4 2017, Tier 2 in place end Q4 2019.

Policy GSA 6

Rural Support Scheme (d) (EDTSC & DoE)

To move away from an area-based subsidy regime towards a streamlined, tiered Scheme based on the provision of public goods and services.

2.28 The provision of grants and subsidy through the Island's rural development programme should aim to incentivise activities that are consistent with business and Government objectives; measures are required that increase productivity, help businesses become more sustainable and meet the demands of domestic and global markets.

2.29 It is clear that targeted support rather than a blanket subsidy can create business growth and development, even in periods of economic decline (See RIS section). To enable the agricultural industry to deliver public goods and services, it must remain profitable whilst facing increased competition in local and export markets, rising costs and meeting broader consumer, environmental, welfare and food standards demands.

2.30 This challenge will need to be met through continued innovation and promotion of environmental best practice (precision farming), identification of new market opportunities (exports and alternative crops) and investing in and improving the skills of the rural work force (industry training).

2.31 An effective support scheme should provide a mix of business, marketing and technical advice, identify training needs and provide a financial incentive linked to cross-compliance in order to deliver public goods that are not automatically provided by the market. This will ensure that the impacts of agriculture on the local environment are minimised, genuine public goods and services are delivered and our international obligations are met.

2.32 We should not discount the impact that a high quality environment has on broader economic objectives. Our inward investment offering is targeted at people who value quality of life: unspoilt beaches, healthy countryside, unique scenery and pure sea air are as important as the proximity to international business centres and point to a relaxed rural lifestyle in a tranquil and secure location, where the best of our environment is protected and enhanced through a responsible approach taken towards the ongoing development of the rural economy.

New Rural Support Scheme (RSS) - Tiered Approach.

2.33 The RSS will comprise three tiers or levels, with applicants developing their businesses in a phased way as they move through the scheme. This will mean completing a basic entry level before progression to level two, then to level three. This will not apply to businesses that already meet the higher level requirements; these will simply move into the highest level of the Scheme. This approach has been endorsed by farming representatives; some farmers have already reached the standard voluntarily having seen its value.

Tier 1

2.34 Tier 1 requires compliance with a nationally recognised entry-level farm assurance scheme by the end of 2017 and in the first instance the [Red Tractor](#)⁽⁴⁴⁾ scheme has been selected as the standard. Red Tractor is an independent UK whole chain food assurance scheme, which assures good standards of food safety, animal welfare and environmental protection from farm to fork. The Red Tractor logo is the leading quality kite mark in the UK.

2.35 Currently not all agricultural businesses are accredited under even a basic assurance scheme, so Tier 1 would allow direct purchase of a basic level of [Good Agricultural and Environmental Practice \(GAEP\)](#)⁽⁴⁵⁾ that links directly to market requirements.

44 <http://www.redtractor.org.uk/choose-site>

45 <https://www.gov.uk/government/publications/cross-compliance-guidance-for-2015>

2.36 This will be externally audited ending the operational tension where staff from the small advisory team act as advisors on one hand and compliance regulators on the other.

2.37 NOTE - Tier 1 Equivalents - Non mainstream sectors of the industry will be required to be accredited to a basic level in an agreed equivalent scheme relevant to their business e.g. [Organic Association](#)⁽⁴⁶⁾, [British Horse Society](#)⁽⁴⁷⁾, [Red Lion Egg Mark](#)⁽⁴⁸⁾ etc.

Tier 2

2.38 Tier 2 is a higher level standard that will build and expand on the entry level baseline standards achieved in Tier 1. This tier will support the delivery of domestic policies such as the Water Management Plan and the Enterprise Strategy and raise standards to those required by an increasing proportion of the major high end food retailers.

2.39 The [Linking Environment and Farming \(LEAF\)](#)⁽⁴⁹⁾ Marque Global Standard has been selected as a delivery mechanism for this tier. The LEAF Marque Standard is an internationally recognised benchmark supporting integrated agricultural and environmental practice and will add brand value to Jersey produce whilst reassuring customers and Government that Jersey producers are operating in a professional, thoughtful and responsible manner. It is a higher level farming standard that fits with the external image of 'quality' that the Island is trying to convey across all sectors.

2.40 The LEAF Marque Standard is a list of questions and control points relating to how individuals manage their farms. The various sections contain specific guidance, measures and conditions to ensure high levels of professionalism and practice in, amongst other areas: farm environmental planning, staff health and safety, protection of soil and water, reduction in pesticide and fertiliser use, nutrient planning, integrated farm management. Meetings have been held with LEAF to begin planning the integration of the LEAF Marque Audit into Jersey's rural development programme and assessing the time period required to get all local businesses to this standard.

2.41 Adoption of the LEAF Marque across industry will also allow more cost effective monitoring of progress via the LEAF Sustainable Farming Review system. All 'members' keep an on-line progress record and Government will have access to these along with the ability to generate reports and analyse the progress of all members through the scheme, looking for areas where assistance may need to be focused.

46 <http://ofgorganic.org>

47 <http://www.bhs.org.uk>

48 <http://www.lioneggfarms.co.uk>

49 <http://www.leafuk.org/leaf/home>

2.42 Once the RSS is established, the emphasis of rural support will have shifted from an area based payment approach to farmers being the provider of high quality public goods and services on behalf of the public of Jersey. This type of direct procurement model is becoming increasingly important, particularly in light of high levels of nitrate and pesticide levels in water supplies; if the public are to be expected to contribute tax towards the support of an industry, they should rightly expect that the environmental impact is minimised.

Tier 3

2.43 To enter Tier 3, businesses will need to have attained Tier 2 LEAF Marque accreditation and then undergo a Jersey Business 'Health Check' (and be implementing any recommendations made as a result). Farmers will be assisted by accredited advisers to achieve a fully integrated farm management approach that will drive continuous improvement and be good for business and the environment. This will ensure they have the necessary business skills sets and are developing on a sound financial footing before further public funds are made available to them.

2.44 Tier 3 will enable farmers to apply for the RIS and CES grants available in that year, aimed at productivity and environmental measures such as pollution prevention measures, training and diversification, precision farming equipment, development of alternative crops, processing infrastructure etc. Government may prioritise specific landscape scale or enterprise issues (e.g. high value alternative export crops or water quality improvement options) and industry will be advised of these priorities prior to application.

Rural Support Scheme agreed budget

Service Area	Total Core Budget 2016 (£)	2017	2018	2019
Rural Economy				
Rural Directorate (overhead, plus staff)	286,216	286,216	286,216	286,216
Single Area Payments/Rural Support Scheme (Tier 2)	700,000	600,750	567,375	534,000
Red Tractor/Org/BHS etc. (Tier 1)		40,000	60,000	80,000
LEAF accreditation				Required
Business Health Check				Required
Quality Milk Payments	400,000	400,000	400,000	400,000
Rural Initiative (Tier 3)	100,000	93,250	52,625	120,000
JPPL/Farm Jersey	124,000	150,000	150,000	150,000
RJA & HS grant	188,000	180,000	172,000	163,000
Cattle Testing	0	40,000	94,000	40,000
Total Rural:	1,798,216	1,790,216	1,782,216	1,773,216
SAP 2016 area claimed	26,700			
RSS (Tier 2) equivalent payment of £/vg		22.50	21.25	20.00

Table 12 Rural Support Scheme agreed budget

Scheme operation

2017

i. SAP Equivalent* (See notes below).

- All 2016 SAP recipients will be eligible for SAP equivalent payments in 2017

ii. Tier 1 - Red Tractor

- Red Tractor (or equivalent) attracts a £1000 payment and will become a requirement by 2018 year end to receive further payments

- iii. Tier 2 - LEAF Marque
 - Existing LEAF Members receive no additional benefits in 2017
- iv. Tier 3 - CES and RIS
 - The CES and RIS will be open to all scheme members in 2017

2018

- i. Tier 1 - SAP Equivalent & Red Tractor
 - Red Tractor (or equivalent) attracts a £1000 payment
 - To receive SAP equivalent in 2018 a business must be Red Tractor (or equivalent) or LEAF accredited by year end
- ii. Tier 2 - LEAF Marque
 - LEAF marque accreditation will become a requirement for receipt of SAP equivalent payment in 2019 therefore businesses wishing to receive this funding should engage with LEAF in 2018 and reach an agreed level of progress (50%) by year end
- iii. Tier 3 - CES and RIS
 - The CES and RIS will be open to Red Tractor (or equivalent) and LEAF accredited businesses only in 2018

2019

- i. Tier 1 - Red Tractor
 - Red Tractor (or equivalent) attracts a £1000 payment but it no longer qualifies for SAP equivalent
- ii. Tier 2 - LEAF Marque and SAP Equivalent
 - To receive SAP equivalent payment in 2019 a business must be LEAF Marque accredited by year end
- iii. Tier 3 - CES and RIS
 - The CES and RIS will be open to LEAF accredited businesses only in 2019

***NOTE - SAP Equivalent**

2.45 The SAP equivalent payment will be based on the area farmed (by the recipient) in 2016 and the available budget. The Jersey Farmers Union (JFU) requested that the per vergée rate be retained at at least £20 minimum. In 2017 the rate is to be £22.50/vg, £21.25/vg in 2018 and £20.00/vg in 2019.

2.46 The use of 2016 as a 'reference year' is for a number of reasons. There is a strong desire from within government for rural support to be decoupled from area (the Single Area Payment (SAP)) completely. Whilst the SAP achieved 'decoupling' of support from production (a progressive policy at the time), critics have argued that an area-based subsidy masks inefficiency, reinforcing the need for subsidy; it potentially becomes capitalised into increased land rental costs with agricultural businesses gaining little benefit, with a disproportionate amount of subsidy going to larger, more profitable farmers. It can also be argued that the SAP has not provided a strong enough mechanism to ensure adherence with market standards or to prevent the build-up of crop pests and the environmental loading of nitrate and pesticides.

2.47 Additionally the SAP application process is relatively administration heavy and open to abuse. Field by field claims need to be individually checked and double claims (intentional or by error) to be followed up. Finally, the Rural Economy directorate has seen significant staff reduction in line with Government saving targets and a leaner system is required.

2.48 However, a quick move away from an area based scheme to an award-by-merit scheme was strongly contested by industry in the final consultation round, based on fears around lack of financial clarity and doubts regarding equity of distribution of funds. In recognition of these fears, a system which makes reference to area farmed will be adopted in a more phased approach, allowing farmers time to adapt their business to the new regime. The land area farmed per business will be reviewed every 3 years and SAP equivalent payments adjusted accordingly. Should a business feel that there has been significant increase or decrease in the land they farm, these will be dealt with on a case by case basis.

2.49 The EDTSC Minister recognises that the current MTFP does not allow the Department to take full advantage of the opportunities to promote higher productivity and growth in the rural sector and has asked officers to investigate options to access additional funds from the [Economic and Productivity Growth Drawdown Provision \(EPGDP\)](https://www.gov.je/Benefits/Grants/IndustryGrants/Pages/EconomicGrowthProvision)⁽⁵⁰⁾ to allow elements of the rural development programme, such as the Rural Initiative Scheme and Farm Jersey to be recapitalised.

50 <https://www.gov.je/Benefits/Grants/IndustryGrants/Pages/EconomicGrowthProvision>

In short the RSS will:

- Raise all farms to a basic standard to comply with domestic legislation
- Encourage all farms to meet global export market standards
- Improve the brand value of Jersey agriculture, reduce the environmental footprint of the rural economy, raise performance standards and increase productivity
- Integrate a business health check to ensure investment decisions are made on a sustainable economic base, providing a springboard for access to higher tier funding to generate productivity gains
- Allow Government to procure public goods and services that are also required by the market
- Begin to separate Government financial support from farmed area

STAFF & REVENUE

Compliance Monitoring

Aim GSA 7

Compliance Monitoring

To streamline and LEAN compliance monitoring as public support for agriculture transitions from area payments to performance payments.

KPI = Completion Q4 2019

Policy GSA 7

*Compliance Monitoring (EDTSC & DoE)

A review of compliance monitoring activities across the Department will be undertaken to remove any unnecessary duplication, and identify gaps in monitoring for statutory purposes.

Adoption of the Rural Support Scheme (RSS) will remove a large amount of compliance work around businesses that enter the Scheme.

**This policy requires advisory input*

2.50 Compliance monitoring is required within the rural economy to ensure good practice, monitor progress against MEAs and to ensure compliance under current grant schemes.

2.51 It is felt by some that there is repetition in current compliance checking activities and by others that the level of checking is insufficient to ensure that contractual commitments (e.g. farm environment/nutrient management plans) are fulfilled. Currently a minimum of 10% of those in receipt of the Single Area Payment are randomly checked to ensure compliance with the terms of the scheme and in addition, all financial information provided is checked for compliance.

2.52 The proposed Rural Support Scheme (RSS) aims to reduce the monitoring required by officers with the responsibility for compliance monitoring shifted to independent assurance scheme auditors (RSS Tier 1 and 2).

2.53 The review will also consider options for technological fixes (mobile working/tablets) to provide on-site capabilities enabling a broad range of work to be conducted in a single compliance check, reducing repetition and farms visits.

STAFF ONLY

Communication Strategy

Aim GSA 8

Communication Strategy

To develop an effective two-way e-communication strategy between rural sectors and government.

KPI - strategy complete by Q3 2017. Implemented by Q2 2018.

Policy GSA 8

Communication Strategy (DoE)

The rural economy section will develop an e-based communication strategy: use of e-media will reduce staff and material costs and allow development of a responsive, feedback enabled system to deliver and gather information and opinion rapidly.

2.54 The Department has tried various methods for disseminating information to sectors of the rural economy from daily radio information in the 1980s to the weekly JEP 'Farmers and Growers Information Page' in the 1990s and the recently terminated 'Rural Update'. This publication was emailed and posted to a wide circulation list with little feedback received on quality or use of its content.

2.55 With the wide range of social media platforms available and the ease of adding material to these in moments, the Department should review its information sharing methods and develop a feedback-led communications strategy. Proactive information delivery systems such as Facebook, Twitter and Corporate SMS systems have advantages over a website (reliant on users viewing it) in that all information is delivered to a user, who then decides whether to view/read it or not. Recipients are able to respond to information being posted and the Department is able to tailor its content accordingly. This would be targeted at the rural industries, pressure groups, consumers, the public and other interested parties, responding to concerns, obtaining feedback and communication policy objectives.

STAFF ONLY

2 a GOVERNMENT STRATEGIC AIMS - DAIRY AND LIVESTOCK

Dairy Industry

Aim GSA 9

Dairy Industry Support

To protect the domestic milk market at a time of transition and export market development to ensure that the Jersey cow retains its position as an ambassador for the Island and an icon of the Jersey countryside.

Policy GSA 9

Dairy Industry Support (EDTSC)

The Government of Jersey will continue to support the development of a sustainable future for the dairy industry on the basis that it is a fundamental part of the rural economy, culturally and historically significant and that it represents an increasingly important 'brand' that can be used to promote the Island as a whole.

This will be achieved through the continued provision of the Quality Milk Payment, an abattoir, support for essential dairy services, advice provision and the modernisation of the legislation governing the Jersey Milk Marketing Board (JMMB).

2.56 The iconic 'Jersey' cow plays a critical role in Island life, historically, culturally and economically both at the domestic level and internationally. It provides Islanders with a 'sense of place' and has been exported world-wide ensuring that Jersey, the home of the breed, has a high profile in the international community encouraging inward investment, tourism, adding value to Jersey products and effectively helping put Jersey 'on the map'.

2.57 It is because of the special status of the Jersey cow that successive rural economy strategies have supported dairy farming, helping ensure its survival, whilst the Island is supplied with high quality local dairy products. Support has been based on financial needs of individual dairy farmers, rather than those of Jersey Dairy which operates as the trading arm of the Jersey Milk Marketing Board (JMMB).

2.58 The current package of financial support payments was introduced in the 2006 RES when the dairy industry was experiencing particularly low levels of profitability and was more dependent on high levels of direct financial support.

This aid package was designed to support and implement the 'Road Map to Recovery' which highlighted what needed to be done to move the milk sector towards increased productivity and included the following measures:

1. Importation of international Jersey semen to improve genetics of the Jersey Island breed. The first importation was in 2008 but the full effects of farm efficiency improvements, due to semen importation, will not be realised until 2018
2. Building a new dairy to improve manufacturing efficiencies and develop a value added export market
3. Sale of the Five Oaks Dairy site to fund the new dairy and reduce overall debt carried by Jersey Dairy
4. Implementation of a programme of farm efficiency improvements to increase profitability

2.59 The support measures received by the dairy industry from 2006 - 2016 have included:

- Quality Milk Payment (QMP)
- Dairy Industry Costings Scheme (DICS)
- Artificial Insemination and Milk Recording Services - Service Level Agreement with the [Royal Jersey Agricultural and Horticultural Society \(RJA&HS\)](#)⁽⁵¹⁾
- Maintenance of the licensing system regulating the importation of liquid milk

2.60 In addition dairy farmers have also had access, as part of Government's general support for the agricultural industry, to the following:

- Single Area Payment (SAP)
- Rural Initiative Scheme (RIS)
- Countryside Enhancement Scheme (CES)
- Agricultural Advisory Service
- Subsidised abattoir processing

51 <http://royaljersey.co.uk>

- Subsidised animal waste disposal (knacker's yard)
- Duty free red diesel

2.61 The 'Road Map to Recovery' has been implemented and the profitability of dairy farms is recovering, albeit slowly, as the contribution of value added export products increases to supplement local sales. QMP will be retained and paid at 2015 levels subject to LEAF and Red Tractor RSS compliance, over the lifetime of the RES.

STAFF & REVENUE

Abattoir Review

Aim GSA 10

Abattoir Review

To ensure the service is being run as efficiently as possible and to evaluate the cost and benefits of meat processing and local meat production, the need for accreditation and slaughtering and disposal provisions.

Policy GSA 10

Abattoir Review (DFI*)

The Government of Jersey will consider the review recommendations in relation to the current funding and operating model of the abattoir and knacker's yard service.

**Department for Infrastructure*

2.62 The aims of supporting the abattoir can be summarised as:

1. to leverage investment in, and the economic development of Jersey's food industry
2. to maintain oversight and monitoring of animal health and welfare
3. to protect the skills and infrastructure that underpin the Island's longer term food security
4. to encourage and support a mixed farming economy

2.63 The aim of supporting the knacker's yard and the incinerator is to comply with [EC Regulation 1069/2009](#) on the health rules for animal by-products⁽⁵²⁾.

2.64 Jersey's only abattoir is situated at La Collette in St Helier and offers cattle, sheep and pig slaughter services for Jersey's livestock farmers. The average weekly throughput of the abattoir in 2016 was 10 cattle, 6 sheep and 11 pigs.

2.65 The knacker's service operates five days per week (Monday, Wednesday-Saturday), providing a slaughter and disposal service for livestock. Livestock are usually slaughtered on the farm of origin and carcasses are transported to the knacker's yard in Trinity for incineration. Operation on a Saturday is intended to ensure that male calves born over the weekend are dispatched within 36 hours of birth. During 2016, the knacker's service disposed of an average of 40 calves, 5 cows, 3 sheep, 1 pig and 1 horse per week.

2.66 The incinerator in 2016, was also used to dispose of 142 tonnes of abattoir waste, 16 tonnes of spent hens and any livestock killed by the knacker's service, as well as any carcasses found washed up on Jersey's shore (e.g. dolphins, seals, etc.). The incinerator usually operates on 3 days of the week (Wednesday-Friday).

2.67 The abattoir, knacker's yard and incinerator infrastructure are owned by the Government of Jersey. All three services are operated by a three-man team based in the Department for Infrastructure (DFI), supplemented by additional ad hoc staff on slaughter days and managed by a single DFI manager.

2.68 The abattoir is regulated to ensure acceptable standards of animal health and welfare and to provide monitoring for zoonosis, operating within food hygiene regulations [EC Regulation 852/2004](#) (on the hygiene of foodstuffs) and [EC Regulation 853/2004](#) (laying down specific hygiene rules for food of animal origin). The abattoir operates to standards and controls laid down within [EC Regulation 854/2004](#) (laying down specific rules for the organisation of official controls on products of animal origin intended for human consumption)⁽⁵³⁾. Slaughter of livestock within the abattoir and by the knacker's service is regulated by the Slaughter of Animals (Jersey) Law (1962), which requires slaughter men to be licenced. The incinerator falls under the Animal By-Product (ABP) Regulations, [EC Regulation 1069/2009](#). Regulation of the abattoir, the knacker's service and ABPs are under the States' Veterinary Officer (SVO), operating through the Department of the Environment.

2.69 An abattoir user group interfaces between the abattoir staff, farmers, butchers and other stakeholders. The abattoir user group is not an operational group but rather a public relations group that meets quarterly.

52 <http://eur-lex.europa.eu>

53 https://ec.europa.eu/food/safety/biosafety/food_hygiene/legislation_en

Rationale for States of Jersey support

2.70 Continued Government of Jersey support for the abattoir and animal by-products facilities has been justified on the basis that together these deliver against a number of government objectives including: economic development, protecting animal health and welfare, food security and emergency planning, environmental management and maintaining a mixed farming economy.

2.71 Economic development: Ongoing support for the abattoir has allowed for the development of a number of independent, artisan, butchers and food processors. These not only add value to the meat outputs of the abattoir, but they also contribute to the development of Jersey's 'food culture'. [Visit Jersey research published in 2015](#)⁽⁵⁴⁾ stated that: '*Almost half of all visitors to Jersey from Great Britain are in socioeconomic group AB. This is the group most likely to seek out restaurants that serve local food, with almost 40% doing so*'. Put simply, higher value visitors are attracted to places where they can expect to find good quality local foods on offer in restaurants and cafes, the abattoir makes this possible for meat products on Jersey.

2.72 Visit Jersey's Destination Plan (2015) notes that: '*Jersey's food offering is top class and is consistently rated amongst the best experiences Jersey offers.*' On an Island where the iconic Jersey cow is ever present, an Island celebrated for its agricultural heritage, the line of sight from field to fork provides a distinct advantage for developing the market for Jersey meat; the abattoir provides the means to take this advantage.

2.73 Animal health and welfare: The abattoir and knacker's service together provide a central point for veterinary monitoring of animal health and welfare. Veterinary inspections at the abattoir coupled with the post mortem facilities at the knacker's yard allow for disease surveillance and they support the SVO in monitoring issues of welfare concern.

2.74 The abattoir service means that there is no need to ship live animals for slaughter. Not only is regular live animal shipping a logistical challenge, it is also a challenge to animal welfare and has proved unpopular with large sections of the UK and wider northern European population. As a local abattoir facility the maximum distance it is necessary for any animal to travel to slaughter is approximately 15 miles; there is no additional transport-stress associated with shipping, with being traded through a livestock market, or with prolonged journey times.

54 <https://business.jersey.com/jersey-destination-plan>

2.75 EC Regulation 1069/2009 lays down health rules as regards animal by-products. Whilst Jersey is not within the EU, for broader agricultural trade reasons it is prudent to comply with these. Article 4 includes that: *"Member States shall ensure that an adequate system is in place on their territory ensuring that animal by-products are: (a) collected, identified and transported without undue delay and (b) treated, used or disposed of in accordance with this regulation"*. It should be noted that it is not stipulated that Member States should themselves provide these services, only that they should ensure that the system is in place.

2.76 There is no reason why farmers should not dispatch their own cull animals. However, given the low values of cull cattle, sheep and pigs, there is a risk that a reliance on all farmers to dispatch their own livestock would result in some animals being left too long in pain, suffering and distress. Whilst the rapid and effective dispatch of cull animals can be controlled to an extent through regulation, it can be assured by service provision. As such, the knacker's service underpins animal welfare by supporting a rapidly deployed, trained workforce, working alongside practising vets to dispatch sick or injured animals.

2.77 The incinerator at Trinity allows abattoir and knacker's waste to be destroyed in a manner which reduces disease risks to human and animal health; it minimises the period for which carcasses need to be stored prior to disposal; and it ensures that Jersey is compliant with EC Regulation 1069/2009.

2.78 Food security and emergency planning: Whilst the abattoir doesn't slaughter sufficient livestock to provide the whole of Jersey's needs, it does provide the necessary physical infrastructure and skills base for this and its continued support has allowed farmers to diversify towards meat production and for butchers to invest in meat processing facilities. Moreover, in the case of an export ban, it would be necessary to slaughter all animals on-Island and in the absence of the abattoir this would entail all of these being culled and processed through the knacker's facilities.

2.79 Maintaining a mixed farming economy:

The abattoir and animal by-products can be seen as essential infrastructure to maintain and further encourage an integrated system of arable and livestock farming, with all the benefits that this provides for sustainable land use and conservation. Jersey agriculture's economic output is dominated by the Jersey Royal potato and by dairy farming. Integrating arable and livestock farming is increasingly recognised as a



Figure 5 Beef cattle - Agricultural diversity is important

more sustainable way to farm. The diversity of outputs creates a more robust agricultural economy, whilst the diversity of land use helps to mitigate some of the negative consequences of single-crop farming. Livestock farming for meat production is well suited to integrate with the higher value potato crop. For example, beef cattle may be grazed on grass sown immediately after the potato harvest, and this grass crop should in turn reduce the amount of run-off and erosion.

2.80 There are of course other benefits that farmed livestock can provide. On the north coast of Jersey a flock of Manx Loaghtan sheep are being used to graze down invasive bracken. Such conservation grazing provides a sustainable, environmentally-friendly form of land management.

2.81 In addition, serving to reduce the volume of horticultural waste (i.e. vegetables that are harvested but deemed unsuitable for retail), a significant volume of surplus vegetables grown on Jersey are used as animal feed. However, there is potential to do more, for example surplus potatoes could be processed for pig feed (lessening the impact of ploughing-in surplus production) and surplus milk could also be used to this end (lessening the economic penalties for producing over-quota).

STAFF & REVENUE

Quality Milk Payment (QMP)

Aim GSA 11

Quality Milk Payment (QMP)

To continue specific dairy sector financial aid until 2019 in recognition of low levels of profitability in the sector.

KPI - QMP payments issued on time 2017 - 2019.

Policy GSA 11

Quality Milk Payment (QMP) (EDTSC)

The Government of Jersey will continue to fund the QMP at 2015 levels until 2019 at which point the level of subsidy will be reviewed in line with the completion of the current Medium Term Financial Plan (2017-2019). From 2019 QMP payments will require recipient dairy farms to be individually LEAF Marque accredited (see RSS). The objective of the QMP will be to support dairy farmers whilst legislation governing the marketing of milk and milk products is modernised and until greater and more sustainable level of profitability in the industry is realised.

Narrative

2.82 The QMP was originally set at £196 per cow per annum in 2006. This figure has been reduced as dairy farm profitability increased due to the implementation of the 'Road Map to Recovery'. In the current RES the level of funding provided through the QMP was:

- 2011 - £180 per cow per annum
- 2012 - £180 per cow per annum
- 2013 - £168 per cow per annum
- 2014 - £156 per cow per annum
- 2015 - £144 per cow per annum
- 2016 - £144 per cow per annum

2.83 Receipt of QMP is conditional on dairy cows being registered in the Jersey pedigree herd book, compliance with hygiene and welfare legislation and Codes of Good Agricultural and Environmental Practice. These conditions were extended once the slurry storage construction programme had been completed to include closed periods for slurry spreading to protect the Island's water resources.

2.84 The Dairy Industry Costings Scheme (DICS) indicates that dairy farm profitability has been recently recovering but has yet to reach the target EBITDA (20% of turnover) considered essential for the industry to be fully sustainable.

2.85 Consequently, it is considered necessary to maintain the current level of financial support at 2015 levels to continue until the end of the current States financial planning cycle whilst the full effects on milk yields of international semen imports are realised and export markets are fully developed.

2.86 In addition, an early proposal to cease funding the SLA with the RJA&HS to provide milk recording and artificial insemination services to the dairy industry that would have reduced dairy support payments has been reconsidered and the measure reinstated under a proposed new agreement for the RJA&HS to provide a complete Herd Management System for the Island.

STAFF & REVENUE

Herd Management, Artificial Insemination and Milk Recording Services

Aim GSA 12

Herd Management, Artificial Insemination and Milk Recording Services

Promotion of a new Jersey Herd Management System, by outsourcing industry specific services under a revised Service Level Agreement (SLA).

KPI = SLA commencement 2017, reviewed annually.

Policy GSA 12

Herd Management, Artificial Insemination and Milk Recording Services (EDTSC)

The Government of Jersey will support the RJA&HS in providing a new Herd Management System which will include the outsourcing of artificial insemination and milk recording services to the dairy industry.

2.87 Artificial insemination and milk recording services are recognised as an essential part of a modern dairy farming industry, important to improve farm efficiency and ensure that the benefits of semen importation in 2008 are fully realised.

2.88 The Royal Jersey Agricultural and Horticultural Society (RJA&HS) has been contracted by EDTSC to deliver an artificial insemination service and a milk recording service to the dairy industry under four successive Service Level Agreements (2003-2007, 2008-2013, 2014-2015 and 2016). In practice, the RJA&HS passes operational responsibility for these services to Jersey Island Genetics Ltd (JIG) a wholly owned subsidiary company of the Society.

2.89 Prior to 2003 dairy services were delivered by the Government of Jersey, Agriculture and Fisheries Department at a considerable cost to the taxpayer. The transfer of the services to the RJA&HS in 2003 provided efficiency savings and a greater contribution to the running costs of the services being levied on dairy farms in Jersey.

2.90 It is recognised that artificial insemination and milk recording services are a vital part of any modern dairy industry. However, it is also recognised that ultimately the industry needs to make a greater contribution to critical services and that there would be an efficiency in JIG providing a comprehensive livestock management system that delivers more than just artificial insemination and milk recording, including statutory functions associated with tracking cattle movements and health testing at significantly reduced cost to the taxpayer. A new Service Level Agreement (2017-2019) will secure the provision of a comprehensive Jersey Herd Management System (JHMS) with operational benefits for both Government and the dairy industry.

STAFF & REVENUE

Farm animal health planning

Aim GSA 13

Farm animal health planning

To ensure that the provision of public funding is conditional on appropriate farm animal health planning.

KPI = health planning a requirement of Tier 1 and Tier 2 from 2017.

Policy GSA 13

Farm animal health planning (DoE)

Receipt of Government of Jersey financial support from 2017 will be conditional on farm animal health planning and implementation under the Rural Support Scheme (RSS). Such planning can improve profitability, reduce longer term reliance on Government aid, mitigate against the risks of notifiable disease and safeguard the health of the general public.

Narrative

2.91 Animal health refers to an animal being provided with essential needs to reach its full biological potential whilst protected from disease and other conditions, particularly those posing significant animal and public health risk. Farm health planning (FHP) is one of the most effective ways of tackling animal disease and improving farm livestock performance. The main benefits are:

- improved stock health and welfare
- improved farm profits
- reduced veterinary medicine use

2.92 FHP is based on four key principles:

- measure - disease costs per farm/year
- manage - with vet or other advisor, prioritise control measures for problem health areas, using cost/benefit calculations and the most effective health management methods
- monitor - regularly review/improve the FHP
- seek qualified advice - prevention is better than cure

2.93 Farm health planning is a major factor in reducing the economic and welfare costs of animal disease and improves the efficiency and profitability of livestock farms. In addition, properly formulated and implemented health plans can assist in reducing the spread and control of notifiable diseases and in safeguarding the public from animal disease problems.

STAFF & REVENUE

Live cattle and bovine embryo trade - Health Testing

Aim GSA 14

Live cattle and bovine embryo trade - Health Testing

To demonstrate disease free status and facilitate the trade in live cattle and genetic material.

KPI = support provided until 2019.

Policy GSA 14

Live cattle and bovine embryo trade - health testing (DoE)

The Government of Jersey will continue to fund the cattle testing and surveillance programme during the Rural Economy Strategy 2017-2021 on the basis that the livestock sector must comply with Protocol 3 and to protect and enhance the Island's international reputation for quality in all areas of the economy.

2.94 EU Directive 64/432 governing trade in live bovine animals and swine provides a mechanism for officially recognising herds and regions or zones are disease free, part of which requires testing to a pre-determined programme. Programmes exist for bovine tuberculosis (bTB), Brucellosis (B abortus) and Enzootic Bovine Leucosis (EBL),

2.95 There are many notifiable diseases important for trade, however, only cattle from officially bTB, Brucellosis and EBL free herds may be traded, with trade in bovine embryos linked by virtue of the herd of origin having to be officially free of the three diseases. The 3rd country certificates agreed between Jersey and importing countries include reference to this standard. As such, there is no possibility of export, even to the UK, if herds do not have official disease free status under the Directive: this can have severe impacts upon cattle producers.

2.96 Historical testing and surveillance for three notifiable diseases of cattle (bTB, EBL and Brucellosis) demonstrates that the diseases have not been present in Jersey for at least 50 years and possibly longer. However, this testing did not follow the EU Directive 64/432 for trade in live cattle required for exports.

2.97 Reflecting this, the new conditions imposed by the UK in 2013 brought Jersey live cattle exports to an immediate halt and meant future exports of live cattle to the UK required exporting herds to undergo testing for the three diseases.

2.98 The Jersey cattle industry wants to have international recognition of the high health status of the Island herd, in order to add-value to exports and to build a reputation for quality (being synonymous with high health status) in emerging Chinese and other far-east markets.

2.99 Funding was provided in 2014 to implement an EU compliant testing programme and Jersey cattle farmers in conjunction with the States Veterinary Officer, the Royal Jersey Agricultural and Horticultural Society (RJA&HS), and private veterinary practices, began the programme. Herds tested and shown to be officially disease free are now in a position to once again export to the UK and EU. Continued testing is mandatory to maintain Disease Free status.

2.100 Under the current requirements the testing programmes will be required to run at least until the end of 2021 for ELB, 2024 for Brucella and 2025 for bTB. Table 13 lists financial year projections based on invoices received for tests carried out up to 2016.

Jan-Dec 2016 (£)	Jan-Dec 2017 (£)	Jan-Dec 2018 (£)	Jan-Dec 2019 (£)
40,000	38,500	94,000*	36,000**

Table 13 Future Estimated Cattle Health testing Costs

* includes one-off EBL testing to satisfy disease free status application

** bTB and Brucella testing based on same estimate as 2018

NB. Figures based on 2016 levels.

STAFF AND REVENUE

Animal Health

Aim GSA 15,16 & 17

Animal Health

To retain a States Veterinary Officer (SVO) to provide animal health expertise in all aspects of animal health including statutory disease control and animal welfare codes.

KPI = 2017 onwards.

Policy GSA 15

Animal Health (a) (EDTSC & DoE)

The Government of Jersey will retain a States Veterinary Officer (SVO) with the capacity to provide expertise on all aspects of animal health and welfare in Jersey, delivering the regulatory framework governing trade in animals and animal products as specified in Protocol 3, UK Accession Treaty 1973.

Policy GSA 16

Animal Health (b) (EDTSC & DoE)

Under the guidance of the SVO an agreed funding and compensation mechanism, appropriate for Jersey, should be formulated for the prevention, control and eradication of notifiable diseases in consultation with animal keepers and their representative organisations.

2.101 When considering animal health and welfare, recognising the link to human health is important. First, the public must be protected from disease that can be transmitted from animals to humans e.g. avian influenza. Second, there are wider indirect impacts on the public in terms of restrictions and financial burden if there is an outbreak of a serious animal disease e.g. Foot and Mouth Disease (FMD).

2.102 For official control purposes, animal diseases fall into three broad categories:

1. Highly infectious diseases not usually present in Jersey, UK or the EU which either affect animals or both animals and humans. These diseases, termed notifiable exotic or emerging diseases and in the case of those which are notifiable, are subject to statutory reporting and control measures e.g. FMD and Highly Pathogenic Avian Influenza. Emerging diseases are previously unknown diseases or disease which has moved geographically e.g. Blue tongue.
2. Notifiable diseases of economic significance and zoonoses (transmissible from animals to humans) for which there are ongoing control programmes. For the protection of animal and human health these diseases are often subject to statutory reporting and control measures e.g. bovine tuberculosis and Brucellosis, neither of which are present in Jersey.
3. Diseases of animals that do not present a significant public health concern but which affect the welfare of animals, livestock productivity and profit e.g. virus pneumonia and mastitis, or wildlife at the population level.

Notifiable Diseases

2.103 The primary responsibility for the health and welfare of animals rests with the animal keeper. Government's role is particularly important when demonstrating certain standards are complied with and exercising controls where necessary.

2.104 The two primary pieces of legislation that regulate animal health and welfare are:

- The soon to be enacted Animal Health (Jersey) Law 2017 which replaces the Diseases of Animals (Jersey) Law 1956
- Animal Welfare (Jersey) 2004

2.105 The Animal Health (Jersey) Law 2017 sets out arrangements by which Government can control animal diseases by:

- Orders to prevent the spreading of disease
- Separation of diseased animals and notification to the Minister
- Treatment by vaccination
- Management of infested places and areas
- Power to exclude people
- Power to slaughter
- Regulation of movement
- Prohibition of import and export
- Provision of compensation

2.106 Whilst it may be reasonable for society to decide that the management of certain disease requires culling of animals in the public interest, it is also recognised that the animal keeper may be entitled to compensation. In the UK animals culled for Tuberculosis (TB), FMD, Bovine Spongiform Encephalopathy (BSE) and Avian Influenza are compensated at average market value. Pigs culled for Classical Swine fever are reduced to 50% market value. Animals which die or are culled for non-notifiable diseases such as BVD, mastitis and salmonella receive no compensation. Culling, with valuation and compensation as part of an official control programme for a notifiable disease, is a rare and irregular event.

STAFF AND REVENUE

Review of current animal welfare codes

Policy GSA 17

*Review of current animal welfare codes (DoE)

The Welfare Codes formulated in 2004 should be reviewed and updated to ensure they are adequate to ensure farm animal welfare standards in Jersey.

**This policy requires advisory input*

Narrative

2.107 The [current farm animal welfare codes](#)⁽⁵⁵⁾ were formulated in 2004 in preparation for the adoption of the Animal Welfare (Jersey) Law 2004. The content of the codes sets the minimum husbandry standards required by animal keepers to ensure that adequate standards of animal welfare are maintained.

2.108 The following codes are over 10 years old and may require updating to take account of updated understanding and new practices and changes to the type of farm livestock and husbandry available in Jersey (beef animals).

- Jersey Code of Practice for the welfare of cattle
- Jersey Code of Practice for the welfare of sheep
- Jersey Code of Practice for the welfare of pigs
- Jersey Code of Practice for the welfare of poultry
- Jersey Code of Practice for the welfare of horses

STAFF ONLY

55 <https://www.gov.je/Industry/FarmingFishing/AnimalWelfare/Pages/index.aspx>

Equine Industry Grazing Licences

Aim GSA 18

Equine Industry Grazing Licences

To explore any synergies between the granting of grazing licences and reduction of PCN populations and fertiliser inputs.

KPI = review complete Q4 2017.

Policy GSA 18

Equine Industry Grazing Licences (EDTSC & DoE)

The Government of Jersey will review the provision of equine grazing licences and consider the benefits of granting three year temporary horse grazing licences for potato land with high Potato Cyst Nematode (PCN) populations in order to assist natural decline of the pest. Licences could have environmental improvement conditionality and would not be permitted on land that could feasibly be used for dairy grazing to prevent the fragmentation of important grazing areas.

2.109 The number of horses in Jersey has long been a subject of debate, with agricultural statistics data at odds with estimates from veterinary practices, horse societies and clubs.

Equines (kept on farms)

2.110 Total equines kept on agricultural holdings reached a peak in 2013 with 886 horses being recorded, however, there has been a steady decline over the last three years with approximately 800 horses being recorded in 2016. Donkeys owned by farmers have remained relatively static at 22 animals in 2016. 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 horses. 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.

2.111 The equine industry (commercial and private) is viewed by the dairy and potato industry as unwanted competition for agricultural land and of little importance when considering rural policy. However, with an estimated £10m turnover per annum generated from a land area of approximately 2,400 vergées (equating to £4,166/vg) the equine industry is and should be recognised as a very profitable and socially valuable use of land resources, with many people of many classes involved in equine activities, spending time in the countryside with the health and well-being benefits associated with this.

2.112 However, the equine industry has long complained at the lack of grazing land available to them. There would be benefits to the equine and potato industries of granting horse grazing licenses on some potato land (where unsuitable for use by dairy farmers) allowing that land to rotate out of potato production and into horse grazing for a three year period, freeing grazed land to come into the potato rotation.

2.113 Land swaps between the dairy industry and potato growers are already common, with small areas of dairy land coming into potato production in return for larger areas of potato land being used for secondary forage crops such as maize or silage after potatoes but the majority of these type of swaps are for less than one year and are of little help in reducing PCN.

2.114 Where horses have been grazed for a number of years on the same land, it can deteriorate through overgrazing and compaction (evident around livery stables) but is also likely to have low PCN levels so would not require chemical treatment prior to growing a potato crop and would benefit from the associated cultivation activities. Conversely, land that is cropped annually for potatoes but cannot be grazed long term (three years) is likely to have high pcn levels and will require chemical controls annually.

2.115 An important point to make is that high land rentals on good potato land have in the past put strain on the less lucrative dairy industry being unable to compete with prices being paid. This in turn has kept rentals high at £150-£200 vergée/year for potato land and lower quality dairy land costing between £50 and £150 vergée/year.

2.116 Potato growers are fearful of losing rented land from their land bank, but must cultivate it with a profitable crop (potatoes) in order to cover these rents. It is likely that equine users could sub-let land from potato growers, under licence, at rates suitable to allow the potato grower to retain the land in their land bank but rest it from potatoes.

2.117 Licences could be conditional on the equine user implementing environmental improvements such as tree planting or a proportion of the land being sown to wildlife crops, and licences would not be granted to low PCN category land or land that could be used by the dairy industry.

2.118 It is recommended that a study of the benefits of a new approach to granting of equine grazing licences be conducted, in effect using horses to provide an economically viable, low impact component in the Jersey Royal potato rotation.

STAFF ONLY

2 b GOVERNMENT STRATEGIC AIMS - REDUCING THE ENVIRONMENTAL IMPACTS OF AGRICULTURE

Agricultural Land Laws and Husbandry Practices

Aim GSA 19

Agricultural Land Laws and husbandry practices

To strengthen regulatory options in terms of controlling damaging land management practices.

KPI = review and position paper complete Q4 2019.

Policy GSA 19

*Agricultural Land Laws and husbandry practices (EDTSC & DoE)

The Government of Jersey will review definitions and powers of the Protection of Agricultural Land (Jersey) Law 1964 and the Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974 that may be used to control agricultural practices to benefit the long term sustainability of agricultural land in Jersey.

**This policy requires advisory input*

2.119 The production of Jersey Royal potatoes since the 1880's, the more recent withdrawal of a number of pesticides and the reliance on inorganic fertilisers has seen increasing levels of Potato Cyst Nematodes, high levels of nitrate in water, high soil phosphate and low soil organic matter. These are some of the impacts current agricultural practices have had on the environment.

2.120 It is recognised that in order to protect the environment from further deterioration the current state of affairs cannot continue. The Government of Jersey and the industry have a responsibility to monitor and mitigate the impact agriculture has on the environment.

2.121 The Action for Cleaner Water Group (formally the Nitrate Working Group)⁽⁵⁶⁾ has issued a set of recommendations to address the issue of nitrate in water and these have been incorporated into the Water Management Plan 2017-2021. However, if voluntary measures fail to resolve the issue quickly enough, then further steps may need to be taken to use a more regulatory approach.

The Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974

2.122 Under this Law, the Minister can ensure that any lease of agricultural land is on terms that encourage the continued cultivation of the land in accordance with the *principles of good husbandry*.

2.123 The Law also states that the permission of the Minister is required for *any* contract or lease, “*whether parol or in writing*”, and this permission requires the land to be managed under principles of good husbandry, currently undefined.

2.124 The often short term nature of land tenure gives farmers no certainty concerning the area of land they farm, leading to higher rents through competition for land and short term management practices with detrimental effects on agricultural land.

2.125 The following illustrates some of the difficulties of the current system;

1. Increasing land rentals as farms “chase and defend” their farmed area
2. Acidification of agricultural land (lowering of pH levels as costly lime is not applied)
3. Lack of soil testing (soil enrichment especially N & P)
4. Un-coordinated use of manures and fertiliser by farmers between first and second crops
5. Soil compaction
6. Increasing PCN levels
7. Annual hedge management to maximise land area (no rotational cutting)
8. Lack of regard for wildlife and environmental improvements
9. Landlords being disenfranchised and uncertain of their role in the management of their agricultural land
10. Growers not prepared to invest in the land if on a short term lease

56 In 2014 the formation of a ‘Nitrate Working Group’ was proposed by the Minister for Planning and Environment to examine the issue again and make recommendations. The group met at regular (approx. 4-6 weekly) intervals from June 2014 to May 2015. The group comprised representatives from the farming industry, Jersey Water, the Department of the Environment, Economic Development Department and Health and Social Services. The group produced an agreed set of recommendations in May 2015 (see Appendix V).

2.126 To address these concerns a move to written leases which spell out the expectations and responsibilities of both parties, detailing the environmental and/or management conditions that must be undertaken during occupancy could be considered.

2.127 There is also a concern that land surrounding dairy farms should be offered special protection so as to ensure sufficient land available for the businesses to be sustainable, though this does risk distorting the market as this would prevent more profitable use being made of the land.

2.128 The existing law does permit the Minister to secure land around dairy farms for the use of the farm, see below:

"2 Control of sales and leases of agricultural land

(1) No person shall, whether as vendor, purchaser, lessor, lessee or other party, and whether as principal or agent, enter into any contract for the sale or transfer of any agricultural land or any lease (whether parol or in writing) of any agricultural land without the consent of the Minister.

(2) The Minister may refuse consent to any transaction to which this Article refers or may grant consent either unconditionally or subject to such conditions as the Minister thinks fit and, in deciding whether or not to grant consent or otherwise, the Minister shall have particular regard to the desirability of reserving agricultural land for the use of bona fide inhabitants of Jersey engaged wholly or mainly in work of an agricultural or horticultural nature in Jersey, and ensuring that any lease of agricultural land is on terms that encourage the continued cultivation of the land in accordance with the principles of good husbandry".

2.129 The requirement that the Minister must approve all leases has not been enforced to date but could be seen as a way to improve husbandry practises though this would have implications for the Land Controls section in regard to staff time required to enforce the existing legislation.

The Protection of Agricultural Land (Jersey) Law 1964

2.130 This Law prohibits the spoliation of agricultural land and it is an offence if a person "...fails to do anything which the person ought reasonably to do in the ordinary course of good husbandry".

Comparison of the Protection of Agricultural Land (Jersey) Law 1964 and the Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974

2.131 Whereas both laws define agricultural land there is no definition of what constitutes good husbandry and this needs to be considered.

2.132 The Protection of Agricultural Land (Jersey) Law 1964 has broader but less specific powers to control the husbandry of agricultural land as it applies to all land and not just that captured by the Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974 at the time of a transaction.

2.133 The Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974, although not applicable to all land, is more specific in that it could, for example, allow the Minister to impose conditions that would prevent potatoes being grown on Category 3 & 4 land but only at the time that the land is sold or transferred. The issue remains on how to extend this Law to impose agricultural conditions on all land and not just at the time of the sale or transfer; this point was raised during the Land Law review and needs further investigation.

STAFF ONLY

Tackling Agricultural Diffuse Pollution

Aim GSA 20

Tackling agricultural diffuse pollution (a)

To support the Water Management Plan and contribute towards a 10 - 15% target reduction in nitrogen application.

Policy GSA 20

Tackling agricultural diffuse pollution (a) (EDTSC, Health, DFI & DoE)

The Government of Jersey will support the suite of measures agreed by the Action for Cleaner Water Group (formally the Nitrate Working Group) and the Rural Economy Strategy will support and complement measures identified within the Water Management Plan 2017-21. The Action for Cleaner Water Group should continue to monitor and review progress on nitrate reduction.

Aim GSA 21

Tackling agricultural diffuse pollution (b)

To update the Code of Good Agricultural Practice in support of the Water Management Plan.

Completion Q4 2017

To update local Pesticide Regulations in support of the Water Management Plan.

Completion Q4 2018

Policy GSA 21

Tackling agricultural diffuse pollution (b) (EDTSC, HSSD*, DFI & DoE)

The Code of Good Agricultural Practice for the Protection of Water will be updated as this defines good practice. Any financial support provided to farmers by the taxpayer should be contingent on Water Code compliance. Pesticide regulation will be reviewed in light of the 2015-16 breaches in raw water resources, with measures put in place to ensure pesticides unsuited to Jersey's sensitive water catchments are not used or are more stringently monitored.

**Health and Social Services Department*

2.134 An adequate supply of good quality water is essential for a healthy and functional natural environment, for recreation and to support Jersey's economy. By managing the Island's waters appropriately, the ecosystem services that water provides can be safeguarded for the future.

2.135 Land use and water quality are inherently linked, and these land uses are reflected in the key issues for water management. In Jersey there are pressures on the water environment from a number of activities that include water supply, waste water management, industry, the rural environment, the urban environment, tourism and recreation, physical modifications and invasive non-native species⁽⁵⁷⁾. The public water supply, derived mainly from surface water, is the major use. Private water abstraction for business and domestic use is also significant, this being mostly derived from groundwater. Agriculture is a key business user of directly abstracted groundwater. The tourism, recreation, fisheries and aquaculture sectors are also key users and are wholly or partially water dependant.

2.136 Although Jersey is not part of the EU it has set standards for drinking water that mirror EU/UK standards and where applicable, it also looks to set standards equivalent to the EU and UK for other waters. Jersey also has Multilateral Environmental Agreement (MEA) obligations such as those under the Convention for the Protection of the Marine Environment of the North-East Atlantic (the OSPAR Convention) or the Convention on Biological Diversity (CBD) and associated Aichi targets to 2020 that relate to nutrient levels in water and habitats, ecosystem health and functioning. Under local law, Jersey Water must supply drinking water with a nitrate concentration below 50 mg/l NO₃. As a consequence of high levels of nitrate in source water, the water company needs dispensations to supply water to the public when concentrations are higher than 50 mg/l nitrate. The Medical Officer for Health is not willing to support this position indefinitely.

2.137 The status assessment carried out by the Government of Jersey⁽⁵⁸⁾ as part of the preparation and background for the [Water Management Plan 2017-21](#)⁽⁵⁹⁾ underlined that the nitrate in both ground and surface waters in Jersey are key challenges that need to be addressed, as well as highlighting issues with other diffuse pollutants such as pesticides and phosphates that need further investigation.

2.138 The high nitrate in Jersey's surface and groundwater comes predominantly from intensive agriculture, but is also exacerbated by other population pressures such as domestic and amenity sources of nitrogen (e.g. septic tanks or golf courses/gardens).

57 Challenges for the Water Environment of Jersey, 2014, copies available from the Department of the Environment

58 Challenges for the Water Environment of Jersey, 2014, copies available from the Department of the Environment.

59 <https://www.gov.je/Government/Pages/StatesReports>

Measures to deal with diffuse nitrate pollution

2.139 Dealing with nitrate pollution is problematic within the current provisions of the Water Pollution Law (2000). Predominantly there is a real difficulty in being able to demonstrate any of the evidential necessities to secure a prosecution. Nitrate pollution is diffuse in nature i.e. it comes from a high number of sources and happens over time, cumulatively having a large impact.

2.140 The Department of the Environment has been working with the farming community using a mixture of education, advice and incentives to better understand the barriers and incentives to good agricultural practices and to see what improvements in water quality could be achieved. This work has been mainly delivered at no additional cost to government through initiatives linked to the Rural Economy Strategy (RES) 2011-2015. This has included economic incentives, a tightening of the Single Area Payment (SAP) subsidy compliance requirements for good practice and the Countryside Enhancement Scheme (CES), along with talking to farmers about the problems that they face and trying to solve them through visits, advice and training.

2.141 Average nitrate levels have reduced in both ground and surface water. However, there is still some way to go and the seasonal spikes of nitrate in the mains water supply are still of major concern, as is the impact on the thousands of households on private water supplies (boreholes and wells).

2.142 Currently, the law is not set up to regulate diffuse pollution effectively. The Water Management Plan 2017-21 is proposing to address this through introducing the 'Water Management Area' provisions under the [Water Pollution \(Jersey\) Law 2000](#)⁽⁶⁰⁾. In the meantime however, if rural financial support is cut there is currently no way to ensure good practice in terms of soil and water protection measures to prevent diffuse pollution. Also, regulation, whilst effective and necessary, is not a magic bullet. Even with the correct legislation in place diffuse pollution is difficult to regulate without complementary incentives and educational and advisory support. Regulation on its own has been demonstrated not to be effective in changing behaviour⁽⁶¹⁾. This means that we need to underpin regulation with other measures.

2.143 Therefore, there is a renewed and continued urgency to implement and continue to support measures to address the diffuse pollution problem in Jersey from nitrate, phosphate and pesticides. Measures in both the RES 2017-21 and the Water Management Plan 2017-21 need to prioritise these issues to return the Island's water bodies to good status.

STAFF & REVENUE

60 <https://www.jerseylaw.je/laws/revised/Pages/27.800.aspx>

61 Evidence on cost effectiveness suggests that "Sanctions have previously proved relatively ineffective in changing behaviours". National Audit Office, 2010

Soil Nutrient Calculator

Aim GSA 22

Soil Nutrient Calculator

To work with the farming industry and Jersey Water to develop an open access nutrient management tool to contribute towards a 10 - 15% target reduction in nitrogen application.

Completion Q4 2020.

Policy GSA 22

*Soil Nutrient Calculator (DoE)

In support of the Action for Cleaner Water Group, it is proposed that the Government of Jersey and industry attempt to develop an Island-wide soil nutrient calculator.

**This policy requires advisory input*

2.144 Agricultural practices including the use of fertilisers have the potential to damage the natural environment by polluting water and damaging the soil.

2.145 The 'RB 209 Fertiliser Manual' is a tool to help farmers and land managers better assess the fertiliser required for the crops they plan to grow, suggesting what level of nutrients are required to provide the best financial return for the farm business. The manual aims to ensure that proper account is taken of both mineral fertilisers and other sources of nutrients such as manures and slurries, so helping to prevent costly over-application and adverse environmental effects.

2.146 Various training has been provided by the Department to Jersey growers on RB 209 use but RES consultations clearly indicated that many local growers struggle to interpret it correctly if they use it at all, instead most rely on Fertiliser Advisers Certification and Training Scheme (FACTS) qualified advisers.

2.147 Another factor in over application is the relationship between the relatively low cost of fertiliser, the potentially high profit in a Jersey Royal crop and the vanishingly small likelihood of reprimand for over application; diffuse pollution is inherently difficult to pin to source. For these reasons some farmers will over-apply fertilisers as an insurance against profit loss, regardless of whether the crop requires it or not.

2.148 In support of the advisory contribution to the Action for Cleaner Water Group, it is proposed that the Government of Jersey develop an Island-wide soil nutrient calculator, based on RB 209 calculations and employing the new ESRI ArcGIS software. Soil nutrient analyses are proposed to be provided free of charge to growers. This data will be fed into the model and growers will have to access the service via the internet, selecting specific fields and adding crop and manure parameters to gain an accurate fertiliser recommendation for their nutrient management planning activities. The model will also provide valuable management data to government and allow mapping of high nutrient areas for further measures should they be required in future.

STAFF & REVENUE

Soil and Land Classification

Aim GSA 23

Soil and Land classification

To develop a land classification system to highlight risk areas for application of agricultural products.

KPI = completion Q4 2019.

Policy GSA 23

*Soil and Land classification (DoE)

The Government of Jersey will reconsider the introduction of a land and soil classification system in light of the recent issues regarding contamination of surface, ground and reservoir waters: such a system will help identify land where certain agrochemicals are unsuitable for use.

**This policy requires advisory input*

2.149 There is no official classification of the Island's soil and agricultural land to identify the most productive agricultural, environmental and amenity areas. This will be an important tool for identifying and protecting the most vulnerable and valuable areas and to inform future land use planning.

2.150 Agricultural practices can also have a number of detrimental effects on the environment. Agriculture contributes significantly to the high nitrate levels in our waters though industry has taken steps to address environmental concerns in recent years and water analyses have shown a downward trend in nitrate levels.

In addition, pesticides are detected in surface and ground waters as a result of poor management practices or excessive rainfall soon after application. There are numerous instances where pesticide contamination has been found in streams feeding public reservoirs which have caused major problems in the public water supply (e.g. Grand Vaux February 2005, Val de la Mare 2015).

[The National Soil Resources Institute \(NSRI\)](#)⁽⁶²⁾

2.151 The National Soil Resources Institute (NSRI) provides guidance on all aspects of soils at a UK and EU level. In particular it has a key role to advance the understanding of land, soil and environmental management particularly in the fields of environmental protection, agricultural management and water resources pollution control.

2.152 In 1983 a 1:250,000 scale [National Soil Map \(NATMAP\)](#)⁽⁶³⁾ was produced covering the whole of England and Wales. These maps and the data collected during their production now form part of the NSRI Land Information System (LandIS) database, the largest soil and environmental database in Western Europe. Since the mid 1980's these soil maps in conjunction with the LandIS database have been used to generate a wide range of land interpretations to guide decision making in response to local, national and European-wide initiatives and Directives.

2.153 A Jersey soil map and data base would help underpin rural and environmental policy and aid in any decision making process related to land and water. It would help protect our environment, enabling decisions to be made objectively rather than subjectively with regard to the following:

- Agriculture
- Environment
- Non-agricultural land management
- Water quality resources agri-environmental issues

Benefits would include:

1. Suitability of land for individual crops (includes major arable crops and selected horticultural crops)
2. Need for underdrainage
3. Land quality assessment

62 <https://www.cranfield.ac.uk/centres/soil-and-agrifood-institute/research-groups/national-soil-resources-institute>

63 <http://www.landis.org.uk/data/natmap.cfm>

4. Groundwater vulnerability e.g. to agrochemicals
5. Soil hydrological pathways - linked to NSRI's Hydrology of Soil Type (HOST) classification
6. Suitability for septic tank drainage
7. Suitability for sewage sludge, farm wastes, other wastes, animal carcasses, landfill sites etc.
8. Soil corrosion risk to metal pipes
9. Shrink-swell assessments for foundation stability
10. Habitat regeneration

STAFF & REVENUE

Agricultural Research and Development

Aim GSA 24

Agricultural Research and Development

Maintain a modest research capability to support Jersey's needs including protection of natural resources, sustainability and diversification.

KPI = Research to focus on Alternative Crops 2017 - 2021.

Policy GSA 24

*Agricultural Research and Development (EDTSC & DoE)

The Government of Jersey will continue the independent research work of the EMRE team, responding to threats, emerging issues and statutory situations. The priority over the immediate term will be to investigate alternative crops to provide product diversity and rotation opportunities in the potato sector to reduce nitrate and pesticide issues in water supplies. Alternative PCN control methods may be researched as they arise and as far as is possible, any research conducted will be in partnership with industry.

**This policy requires advisory input*

2.154 In the past the Government of Jersey provided an extensive Research and Development (R&D) service for the agricultural industry, addressing a range of crop production and economic issues.

2.155 Today some small-scale R&D work continues to be undertaken by the Plant Health Laboratory on a 'needs must' basis from a modest budget concentrating on environmental and economic issues.

2.156 A number of specific cases over the last few years have highlighted the need for a continued research capability in Jersey:

- Potato Cyst Nematode control (alternative controls and pesticide reduction)
- Oak Processionary and Gypsy Moth pheromone control (statutory organisms)
- Alternative crops (rural diversification, PCN reduction and pesticide reduction)



Figure 6 Research - Solanum sysimbrifolium was introduced to industry after Department of the Environment research

2.157 Example 1 - *Solanum sysimbriifolium* is a plant that can stimulate the hatch of PCN but does not provide feeding opportunities so the pest starves and population levels reduce. This method of biological control was identified by the Laboratory some eight years ago but extensive research was needed to establish correct husbandry and use guidelines. The method has been widely taken up by local potato growers as part of a strategy to reduce PCN levels.

2.158 Example 2 - A new garlic based nematicide product was launched onto the commercial market in 2014-15 with approval for use in carrots and parsnips. The approval holder made claims that the product was an effective PCN control agent. Research conducted in partnership with the approval holder and a major local potato farmer concluded that the product had no effect against the local PCN population.

STAFF ONLY

Alternative Crops

Aim GSA 25

Alternative Crops

To identify high value, low volume crops that complement the Jersey Royal rotation as a viable option for reducing PCN and nitrogen levels.

KPI = National Non-Food Crops Centre scoping reports 1 & 2 published Q1/2 2017. Physical planting of trials Q1 - 4 2017, results reported December each year.

Policy GSA 25

*Alternative Crops (EDTSC & DoE)

The Government of Jersey should continue research on diversifying into high value crops and processing methods for supplying alternative markets and begin field scale trials.

**This policy requires advisory input*

2.159 Jersey growers are prevented from producing many lower value crops by land competition and high export costs. However, in a strategy aiming to reduce nitrate levels, diversify cropping to reduce risk of market failures and provide a rotation opportunity in the Jersey Royal production system, alternatives should be investigated.

2.160 For a crop rotation to reduce PCN levels to be successful it is essential to investigate other high value, niche market produce such as pharmaceutical crops or plant-made pharmaceuticals (PMPs) which might maintain farm incomes and cover high land rentals allowing improved rotational practices.

2.161 PMPs are used to produce pharmaceuticals (medicines), nutraceuticals (body/skin care products) and cosmaceuticals (cosmetics) from oils extracted by pressing or distillation to enhance or form the basis of new products. There are opportunities for on-Island processing, reducing transport costs, retaining value on the Island and creating skilled employment, whilst work conducted by the National Non-Food Crops Consortium has confirmed that there is potential for production of a variety of such crops in Jersey.

STAFF & REVENUE

Alternative and Precision Farming Equipment

Aim GSA 26

Alternative and Precision Farming Equipment

To support the Water Management Plan by assessing and part-funding precision farming equipment and contribute towards a 10 - 15% target reduction in nitrogen application.

KPI = record of funding applications supported 2017 - 2019.

Policy GSA 26

Alternative and Precision Farming Equipment (DoE)

The Government of Jersey will investigate equipment, methodology and funding of precision farming techniques through Tier 3 of the Rural Support Scheme (RSS) or other sources.

2.162 To help implement the Action for Cleaner Water Group recommendations Jersey growers will be encouraged to use precision farming techniques with particular reference to fertiliser and manure application.



Figure 7 Precision agriculture may rapidly contribute to water quality

2.163 Currently, inorganic fertilisers are applied using spinning disk technology which can be difficult to accurately control due to the speed and distance of delivery of the fertiliser. New generation machinery has higher accuracy and may offer benefits to Jersey. With the increase in potato crops being machine planted there is also an opportunity for precision rather than broadcast application, placing fertiliser directly into the root zone where it is needed, whilst not applying fertiliser to headlands and other un-planted areas. Similarly, slurry application via deflector plate could be replaced with injection or dribble bar methods giving similar benefits. Slurry injection kit might also be used to dispose of potato waste to land, reducing related volunteer and PCN issues. Equipment is also available to destroy unwanted potato tubers at harvest, preventing volunteer development and reducing PCN multiplication and this should be tested in the future.



Figure 8 Alternative crops

STAFF & REVENUE

Skills Development

Aim GSA 27

Skills Development

To act as a training facilitator, identifying skills gaps and responding to industry requests, in order to up-skill industry generally.

KPI = register of training events and take-up 2017 - 2019.

Policy GSA 27

*Skills Development (EDTSC & DoE)

The Government of Jersey will offer training opportunities, beginning with a 'back to basics' approach to nutrient planning to help achieve the aims of the Action for Cleaner Water Group. Further training needs will then be identified and facilitated via Tier 3 of the Rural Support Scheme (RSS), aiming to engender a new level of professionalism within industry.

**This policy requires advisory input*

2.164 The number of new entrants seeking a skilled career in agriculture in Jersey is low compared to the demands of the industry. Depending on future immigration policy the industry may not be able to rely on the skills of migrant labour so it is essential that industry develop a local skills base.

2.165 It has already been highlighted that sustainable growth of GVA can only be achieved if:

- labour productivity per person is improved
- market value of crops increase
- industry focuses on producing higher value goods (for example diversification into niche markets)
- crop yields increase
- costs are reduced

- mechanisation is increased
- sufficient motivation and investment is available

2.166 To achieve higher productivity and attract local people to the industry will require the rural sector to invest in training for existing staff, as well as career development, apprenticeships, education and training for future entrants into the industry to address succession issues. In addition, there will be a need for further investment in higher value products, better technical performance to increase output and reduce costs and new innovations to increase economic performance which utilise a more efficient labour force.

2.167 The Government of Jersey has provided a range of training across the rural sector including British Agrochemical Standards Inspectorate Scheme (BASIS) soil and water training, crop nutrient planning, farm pollution planning, animal health and welfare and soil management etc.

2.168 Consultation with industry indicates that basic training around some areas is still required, and that soil nutrient planning skills in particular still need to be further developed, in some cases from the beginning. The advisory service has been asked to provide basic through to advanced farm nutrient planning training, enabling farmers to accurately and easily apply inorganic fertilisers within approved guidelines, and to help them with their agreed measures under the Action for Cleaner Water Group recommendations.

2.169 During this process industry members will be encouraged or assisted to develop into FACTS qualified status, with the possibility of them offering commercial advice back into industry in the future. Other specific training needs identified could be funded via Tier 3 of the RSS. Areas such as business management and marketing might also be of great benefit to the industry.

STAFF & REVENUE

3 BUDGET DEPENDENT POLICIES

3 BUDGET DEPENDENT POLICIES

Rural Initiative Scheme (RIS)

Aim BDP 1

Rural Initiative Scheme (RIS)

To provide support for productivity and innovation projects in the Rural Economy and to assist with meeting the capital requirements of the Rural Support Scheme.

KPI = record of funding applications supported 2017 - 2019.

Policy BDP 1

Rural Initiative Scheme (RIS) (EDTSC)

The Government of Jersey will reserve RIS funding for businesses entering Tier 3 of the Rural Support Scheme (RSS - See Section 2) to invest in training, precision application equipment (fertiliser placement), develop alternative cropping and continue supporting productivity, diversification, energy efficiency and rural innovation.

3.1 Businesses in the rural sector can be perceived as a high investment/low return risk by banks and other lenders due to production uncertainty and volatile markets. This coupled with the current financial situation makes it harder for rural businesses to raise capital. The RSS will aim to provide funds to promote growth in the rural economy by supporting productivity, diversification, enterprise, energy efficiency and innovation. Due to the increasing demands on a reducing rural budget, EMRE officers will prepare a case to raise further RSS funding from the Economic and Productivity Growth Drawdown Provision (EPGDP).

STAFF & REVENUE

Countryside Enhancement Scheme (CES)

Aim BDP 2

Countryside Enhancement Scheme (CES)

To provide funding for businesses (and NGOs) for biodiversity and habitat improvement projects.

KPI = record of funding applications supported 2017 - 2019.

Policy BDP 2

Countryside Enhancement Scheme (CES) (DoE)

The Government of Jersey should retain an agri-environment programme with elements of the current CES made available via Tier 3 of the Rural Support Scheme, to invest in environmental initiatives and training that will benefit the Island's landscape, habitats and wildlife. Projects will be geographically co-ordinated to provide linkage with other environmental projects in order to add value to the funds allocated.

3.2 The CES was developed to provide funding for the delivery of a wide range of environmental projects that would otherwise not be possible due to low profitability in the agricultural industry, lack of funding from the private sector, the value of environmental goods going unrecognised in the market place and agricultural businesses having to focus on economic efficiency. This 'market failure' in the delivery of environmental 'public goods' is recognised in the 'greening' of the EU Common Agricultural Policy (CAP). Sufficient levels of funding for the delivery of rural environmental improvements should be identified and prioritised in the RES allowing Jersey to integrate business activities into environmental outcomes and better meet its international environmental obligations as well as meeting market assurance standards.

STAFF & REVENUE

Jersey Biodiversity Centre

Aim BDP 3

Jersey Biodiversity Centre

To continue to support the Jersey Biodiversity Centre as a public repository of essential data relating to Jersey's flora and fauna but to encourage the Centre to generate income through commercialising their activities to reduce the requirement for Government support.

KPI - 50% reduction in funding requirement over 5 years.

Policy BDP 3

Jersey Biodiversity Centre (DoE)

The Government of Jersey will support the local biological records centre to ensure adequate information is available to understand the condition of our local environment and assist with evidence based policy making.

3.3 Up until 2009, Jersey had scant records on which to base knowledge and actions on a wide range of wildlife issues. Such records were held by a variety of sources, in several incompatible formats. In 2010, the Jersey Biodiversity Centre was set up to act as a focal point for the collation of biological records, following best practice as defined by the UK authorities. In the four years of its existence, it has collated over 600,000 records, providing a resource that not only enables Jersey to monitor its natural environment and report accurately on progress on our international commitments but it also provides a resource for future generations, enabling them to understand changes in the natural environment over time.

3.4 In order to understand the effects of conservation efforts, impacts of industry on the natural environment, trends in populations of species and numerous other environmental factors, there needs to be a robust means to record a wide range of data on numerous issues from a wide range of sources. The maintenance of such records is essential to the accurate measurement of the state of the Islands' natural environment. The maintenance and use of such large datasets requires a dedicated resource, which is best held by a non-government organisation, enabling data to be collected from a wide range of sources. In the UK such record centres are generally self-funding, however, due to the low demand on its services from industry in Jersey, an element of funding is required to ensure continuity. The Jersey Biodiversity Centre has recently become a registered charity and it is hoped that within a few years it will be self-maintaining. Until such time funding from Government will be required.

REVENUE ONLY

Agricultural Loans

Aim BDP 4

Agricultural Loans

To assess the desirability and feasibility of the re-introduction of agricultural loans.

KPI = review complete and position paper produced Q4 2018.

Policy BDP 4

Agricultural Loans (EDTSC)

The Government of Jersey has been asked by some representatives of the farming industry to consider the re-opening of the agricultural loans and guarantees scheme. The current scheme and its effectiveness would need to be reviewed with consideration given to the feasibility of creating and capitalising a Specially Constituted Fund within Tier 3 of the Rural Support Scheme to allow for small-scale loans to be provided where it can be demonstrated that the Government is the lender of last resort.

3.5 The Agriculture (Loans) (Jersey) Law 1974 was introduced to widen the scope of States support for the agricultural industry, with the last loan approved in 2001, the Law remains on the Statute book.

3.6 The agricultural industry would welcome the reintroduction of an agricultural loan scheme, as the security, length of repayment and other terms and conditions imposed by banks since the 2008 economic crisis are said to be too onerous. In addition, the accessibility of agricultural loans could ease the pressure, in a poor growing season, of local farmers having to take on cash flow support packages from marketing companies.

3.7 Prior to the reintroduction of an agricultural loans scheme a number of issues would need to be resolved:

1. Industry claims that bank lending conditions are 'onerous', this assertion must be clarified
2. Under the current legislation an Agricultural Loans Advisory Board (ALAB) comprising nine qualified persons (with suitable financial experience) would need to be appointed, on the recommendation of the Minister, including a Chairman and Vice Chairman. The Terms of Reference under which any loans scheme should operate will need to be clear and accessible and ensure that there is adequate support to those advising on and making decisions on loans provided by the new scheme. All roles, responsibilities and mechanisms for evaluating the overall performance of the loans should be established at the outset.
3. All elements of The Agriculture (Loans) (Jersey) law 1974, the Public Finances (Jersey) Law 2005 and relevant Financial Directions will need to be reviewed prior to any loan terms being agreed.
4. The cost of administration will need to be taken into consideration when proposing any new scheme

3.8 The purpose, scope and administrative responsibilities of any new scheme will need to be considered. Appropriate legislation will need to be adopted and further operation terms of reference agreed. It is important that any such scheme fits comfortably with other business support mechanisms.

STAFF and REVENUE

Charges for Services

Aim BDP 5

Charges for Services

To review service charges ensuring they are reasonable and consistent. Charges for soil nutrient analysis will be made free of charge giving Government rights to the data, to be used in the public good, GSA 22 and 23 and contribute towards a 10 - 15% target reduction in nitrogen application.

KPI = review complete Q4 2017

Policy BDP 5

*Charges for Services (DoE)

The Environment Department will review its services applying full cost recovery where applicable. Where there is a commercial benefit from the provision, services will be charged at full cost recovery, whilst services contributing to public goods will remain or become free of charge.

**This policy requires advisory input*

3.9 The Environment Department provides a number of services to the rural sector, government departments and general public.

3.10 These are currently charged at full or partial cost recovery or provided free of charge. Under [Financial Direction No. 4.1 "Increases in States Fees and Charges"](#)⁽⁶⁴⁾ (User Pays Principle) it is recognised that there are instances where users receive services from a States Department below cost and thus subsidised by the taxpayer, and charges should be applied where possible.

64 <http://www.statesassembly.gov.je/ScrutinyReviewResearches/2007/S-32961-48467-2192007.pdf>

3.11 When considering charges for services they can be broadly categorised into three groups:

- Services providing social benefit / public goods:
 - Invasive pest and disease monitoring, rapid pest diagnoses from public samples, technical advice, research and education to reduce fertiliser and pesticide use etc.
- Statutory Services
 - Jersey has responsibilities under various MEAs which must be delivered
 - In plant and animal health terms Jersey has responsibilities under local, UK and European Law.
- Commercial or private gain
 - Advice and services with a direct effect on a business' profit or personal interests including private garden investigations, soil, water and tissue analyses, trial investigations and analyses in which clients do not wish to share results.

3.12 Financial Direction No. 4.1 states that users should pay for services although industry feels that charges are unfair and would prefer subsidised services, with particular reference to soil nutrient analysis. This specific point may prove beneficial in the drive towards reduction of nutrients in Jersey's ground water as a more robust sampling regime would yield better information on the nutrient status of Jersey's soils.

3.13 In the interest of environmental/water quality improvements, charges for soil nutrient analysis will be removed. The data generated will be passed back to growers but remain the property of Government and used in an Island-wide soil nutrient management programme.

STAFF & REVENUE

4 NATURAL ENVIRONMENT

4 NATURAL ENVIRONMENT

Coastal National Park (CNP)

Aim NE 1

Coastal National Park (CNP)

To support the National Park Interim Working Group in the development of a permanent governance model and in the development and review of the National Park Management Plan.

KPI = Review the National Park Management Plan in 2018.

Policy NE 1

Coastal National Park (CNP) (DoE)

The Government of Jersey will continue to support the CNP through membership of the Governance body, support statutory functions within the Park boundary in a way that is sympathetic to the purposes of the Park and provide specialist advice and administrative support. The Department of the Environment will lead a periodic review of the Coastal National Park Management Plan.

4.1 After nearly 50 years, Jersey and the Channel Islands have their first National Park. Officially launched in May 2016 by the Patron and Lieutenant Governor of Jersey General Sir John McColl, the momentous event marked a milestone in the heritage and protection of Jersey's beautiful landscape and coastline. Getting Jersey's National Park off the ground has been a labour of love for many people in the Island and its benefits, both environmental and economic will be widely felt.

4.2 Parts of Jersey's coast and countryside are considered to be of national and international importance for landscape and environmental quality, with St Ouen's Bay, the north coast and the Island's off-shore reefs within the park boundary and being rightly afforded the highest level of protection.



Figure 9 Offshore reefs are also given protection under the Coastal National Park



Figure 10 Coastal National Park

4.3 Recognition must be given to the impact of human intervention on the character of Jersey’s landscape; people and their activities must remain central to what the National Park is and represents.

4.4 In the UK and throughout the world, National Parks have proven to be important economic engines for local communities with visitors generating additional economic activity and supporting significant employment opportunities. People who visit parks need sign-posting to transportation, accommodation and food outlets - all of which support businesses and provide jobs in local communities.

4.5 There is strong evidence from studies in the UK and other countries of the economic contribution that National Parks can make and the different ways in which this takes place. In the US there is a return of \$10 for every \$1 the American taxpayer invests in the National Park Service; that makes good stewardship sense and good business sense.

4.6 There are a range of potential beneficial economic relationships associated with National Parks:

- Farming and land management provide opportunities for farm stays, farm diversification, local food and drink promotion
- Fishing and marine activities provide options to add value to local fish/shellfish markets/marketing, diversification options, tours, sport and environmental tourism
- People and communities can benefit from greater employment, volunteering opportunities, training provision, and enhanced local services such as improved recreational access infrastructure and interpretation

4.7 Parks also provide a sense of place and an important social link with the qualities that give an area of particular value and importance. National parks offer inspiring educational experiences and unparalleled outdoor recreation opportunities that without doubt can add to the Islands' tourism offering, providing local businesses of all types with the opportunity to use the National Park brand, which epitomises quality, to promote and grow their businesses.

4.8 Our inward investment offering is targeted at people who value quality of life; within the Park unspoilt beaches, unique, world-class views and scenery, clean and pure sea air are just as important hooks as the proximity to international business centres, and point to a relaxed lifestyle in a tranquil and secure location where the best parts of our environment are protected.



Figure 11 Our natural environment adds value and wellbeing

4.9 Under Policy NE6 of the 2011 Island Plan the Environment Minister committed to developing and adopting a management plan for the CNP to help deliver its two key objectives:

- The conservation and enhancement of the natural beauty, wildlife and cultural heritage of the National Park
- To promote opportunities for the understanding and enjoyment of the special qualities of the National Park by the public

4.10 An Interim Working Group (IWG) has been formed from volunteers involved in the CNP development consultation process and tasked by the broader stakeholder group to complete a branding exercise, produce guidance documents and agree management plans. These will be integrated into the review of the Island Plan in 2018-19 so the CNP is fully embedded into the subsequent 2021 Island Plan.

4.11 The IWG is currently composed of representatives from EDTSC, the Department of the Environment, Durrell, Chamber of Commerce, Jersey Farmers Union, RJA&HS, Jersey Motor Cycle & Light Car Club, Société Jersiaise and Visit Jersey.

STAFF & REVENUE

Biodiversity Monitoring & Evidence Based Policy Making

Aim NE 3

Biodiversity Monitoring & Evidence based policy making

Refine monitoring programmes to provide robust evidence supporting policy development across the States of Jersey, whilst ensuring an efficient delivery model using fixed observation points.

KPI = Monitoring activities coordinated and results reported regularly.

Policy NE 2

Biodiversity Monitoring & Evidence based policy making (DoE)

The Government of Jersey will continue to carry out and develop long term monitoring of Jersey's biodiversity to enable evidence based policy formation and meet MEA obligations. However, monitoring activities will be reviewed across EMRE and where appropriate, separate programmes will be combined, staff trained to undertake a broader monitoring role with fixed observation areas (Sentinel Sites) being established to ensure a streamlined and efficient approach is taken.

4.12 The Department administers Jersey's responsibility under the United Nations Convention on Biological Diversity 1992 and 25 other MEA's, requiring Government to have national plans for the sustainable use and conservation of biological resources. This is achieved in Jersey through:

- Biodiversity Strategy, 2000
- [Countryside Character Appraisal, 1999](#)⁽⁶⁵⁾
- [The State of Jersey, 2005](#)⁽⁶⁶⁾
- States Strategic Plan, 2015-2018
- The Island Plan 2011
- The Rural Economy Strategy 2011- 2015

65 <https://www.gov.je/PlanningBuilding/LawsRegs/IslandPlan/Background/Pages>

66 <https://www.gov.je/Government/Pages/StatesReports>

4.13 The Department of the Environment delivers ['The Environment in Figures'](#)⁽⁶⁷⁾ report every five years. It provides biodiversity indicators measuring changes over time, evidence on the health and quality of Jersey's environment and direction in terms of policy and legislation. The work feeds into the Policy and Awareness Team's work on the wider environment of the Island.

4.14 Robust, scientifically designed monitoring schemes provide the evidence to report on progress on our MEA commitments, ensuring the work to improve our natural environment is tested and the results enable management objectives to be changed if required.

4.15 Farmers and landowners must play a crucial role in managing, preserving and improving the rural landscape. The countryside is a working environment needing profitable sustainable businesses, whilst preserving the quality of the Island's natural resources (soil, air and water); this is a complex balancing act and is not always achieved. Industry efforts go unrewarded by the market place but are valuable as the provision of 'public goods' benefits the Island's population.

4.16 Not all agricultural landscapes in Jersey are valued or desirable. Some have been intensified and denuded of natural features; large-scale specialisation or mono-cropping, poor husbandry practice and hedgerow management can seriously impact on our landscape's ecological, aesthetic and socio-cultural character.

4.17 Whilst there has been notable recent success regarding the marsh harrier, buzzard, peregrine falcon and growth in red squirrel numbers (a result of projects including the Birds on the Edge project and increased hedgerow planting) there are a number of serious issues that need to be addressed:

- A number of farmland bird species have become locally extinct or have seriously declined (yellow hammer, skylark, song thrush, mistle thrush, cirl bunting, whitethroat, stonechat, cuckoo and turtle dove)
- A suspected decline in pollinator species
- Butterfly populations isolated in small pockets within the natural environment with an inability to interconnect using the agricultural landscape
- The Phase 1 Habitat Survey 2011 identifies that the majority of agricultural hedgerows and banks are in poor or denuded condition
- Populations of toads, agile frogs, grass snakes and bats have become increasingly rare in agricultural areas

67 <https://www.gov.je/Government/Pages/StatesReports>



Figure 12 Jersey hosts the only population of the Agile Frog (*Rana dalmatina*) in the British Isles

4.18 Jersey has a responsibility to report its MEA progress via the UK to the Conference of the Parties and there is a need to survey to understand the condition of wild animals and habitats. Regular survey of aspects of our environment can be built into a monitoring programme which not only enables us to understand what is happening in our environment but also to report on our international responsibilities.



Figure 13 The Grass Snake (*Natrix natrix*) - a jewel in local biodiversity

4.19 The Jersey Biodiversity Centre is a central tool for management of this data and through this we can determine where our conservation efforts should be targeted. Recent data identified declines in butterflies, especially those dependent on agricultural habitats. Monitoring enables us to target resources effectively and assess whether conservation management is successful or not.

4.20 The Jersey Bird red list was compiled based on data available on birds in Jersey and again this data enables us to target efforts at those species most in need of our help.

STAFF ONLY

Revision of the Biodiversity Strategy

Aim NE 3

Revision of the Biodiversity Strategy

To revise the Biodiversity Strategy to ensure it is fit for purpose and consistent with the Island's environmental commitments and revisions being made to the current wildlife legislation.

KPI = Updated draft complete Q4 2018.

Policy NE 3

Revision of the Biodiversity Strategy (DoE)

The Biodiversity Strategy should be reviewed with a new draft produced in 2017. This work will be done as efficiently as possible as many other jurisdictions have previously developed material relevant to Jersey.

4.21 The policy document 'Biodiversity - a Strategy for Jersey', is a direct response to Jersey's commitments towards conserving biodiversity under the Convention on Biological Diversity. It lists the following goal:

'To conserve and enhance biological diversity in Jersey and to contribute towards the conservation of global biodiversity when appropriate'

and objectives to conserve and where practicable to enhance:

- a) The overall populations and natural ranges of native species and range of wildlife habitats and ecosystems
- b) Internationally important species, habitats and ecosystems
- c) Species, habitats and natural and managed ecosystems that are characteristic of local areas
- d) The biodiversity of natural and semi-natural habitats where this has been diminished.
- e) Increase public awareness of, and involvement in, conserving biodiversity and to contribute to the conservation of biodiversity on a European and global scale

4.22 The Biodiversity Strategy for Jersey is linked to and forms an integral part of a number of other policies and legislation, which in turn prioritise the monitoring of terrestrial biodiversity. The Aichi targets of the Convention on the Conservation of Biological Diversity require member countries to have implemented their own biodiversity strategies and Jersey has already completed this, however, our Strategy should be reviewed to ensure that recent developments in areas such as ecosystem services are addressed in our local environment.

STAFF ONLY

Access to the Countryside

Aim NE 4

Access to the Countryside

To ensure the recommendations of the Countryside Access Strategy for Jersey are implemented.

KPI = Increased network provision by Q4 2018.

Policy NE 4

Access to the Countryside (DoE)

The Natural Environment Team has published the '[Countryside Access Strategy for Jersey](#)' which highlights plans for enhancements to the access network in order to make provisions for a wider range of locals and visitors and to ensure that this valuable asset is planned, developed and managed appropriately for future needs.

4.23 Jersey has an extensive network of paths across public and private land in some of the Island's most beautiful landscapes.

4.24 The paths are used by an estimated 100,000 people a year including both locals and tourists. They promote significant environmental, educational, health and economic benefits to the Island.

4.25 The Government of Jersey's Natural Environment Team manages 70 km of public access to the Jersey countryside, however, there are a number of other agencies that provide public access to the countryside including the National Trust for Jersey, Jersey Water and the parishes but many paths also cross land owned by private individuals.

4.26 The Jersey countryside and its associated biodiversity should be one of our most treasured assets but it is under considerable pressure. Increasing population leads to an increasing need for housing and recreational open space. Access in the countryside raises conflict between users, providers and land owners on narrow paths which are mainly unsuitable for shared use. Furthermore, a lack of funding and investment since the early 1990's has resulted in a gradually deteriorating asset and much of the infrastructure, installed at the same time as the paths were created in the 1980's, is long past its replacement date. In addition, a lack of coordinated working by access providers in the past has resulted in an ad-hoc and often confusing jumble of signs, unconnected paths and untargeted funding.

4.27 In 2014 a public consultation was undertaken to ask for people's views on the main issues surrounding use of the paths and possible options for their future management. Based on the responses, it is evident that the access network is widely appreciated and considered highly desirable by those who make use of it in order to relax, de-stress and follow their recreational, sporting and leisure pursuits.

4.28 Walking and cycling are relatively inexpensive activities, at a basic level they require no special skills and can be built into people's regular daily routine, thus providing one of the simplest ways for people to become more physically active. There are many studies showing a link between access to footpaths and green space to people's physical and mental wellbeing. The consultation responses also confirmed a strong desire by many for the provision of off-road cycling and horse riding facilities. Further results from the consultation are available to download from www.gov.je ⁽⁶⁸⁾

4.29 Countryside access in Jersey is dependent upon the goodwill of private land owners. Access to private land and farmland is fundamental in order to take the pressure of public access away from environmentally sensitive areas and to create a comprehensive Island-wide network.

4.30 The Department of the Environment needs to work with other access providers, users, and landowners to deliver safe, high quality, well maintained access to the countryside which meets the sometimes conflicting needs of the different user groups. Responsible use of the countryside needs to be encouraged for everyone to enjoy the natural environment in a sustainable way. Consistent and clear signage is vital to ensure that all information provided is easily accessible and consistently branded.

4.31 The current revenue budget for access management will be increased as it is currently barely adequate for the scheduled cutting of vegetation to allow unhindered access and addressing priority health and safety concerns on the existing path system. The current budget is not sufficient to allow for any growth in the network or inclusion of specialist access provision.

68 <https://www.gov.je/Government/Pages/StatesReports>

4.32 The access network depends upon a range of infrastructure to enable safe access such as fences, steps, bridges etc. Infrastructure on the access network has a 5 - 10 year life expectancy, after which it may become unsafe. Sufficient capital funds are therefore required to ensure that the infrastructure is replaced before it becomes dangerous, make repairs to paths damaged by unplanned for incidents e.g. extreme storm events, vandalism etc. and to allow resilience to be built into the system for the future.

4.33 Sufficient staff and finances will be made available in order to extend and consequently maintain any growth in the use and extent of the access network.

STAFF & REVENUE

Ecosystem Services

Aim NE 5

Ecosystem Services

To conduct an initial Ecosystem Services assessment for Jersey, introducing this as a tool for evidence based decision making.

KPI = Initial report complete Q2 2017.

Policy NE 5

Ecosystem Services (EDTSC & DoE)

The Government of Jersey will undertake an ecosystem services assessment to determine the true value and benefits of the environment for use in evidence based policy-making decisions. The assessment will identify and quantify (as far as possible using existing data) Jersey's natural capital and ecosystem services, identify the providers and beneficiaries of Jersey's ecosystem services (in broad terms) and analyse trends and opportunities for enhancement.

4.34 here is a wide range of ecosystem services provided by Jersey's natural environment. These include:

- Provisioning services (e.g. food and water supply)
- Regulating services (e.g. climate regulation via carbon storage and sequestration; disease and pest regulation; detoxification and purification of air, water and soil; pollination; hazard regulation)
- Cultural services (e.g. biodiversity; aesthetic/inspiration; tourism and recreation; spiritual/religious wellbeing)
- Supporting services (e.g. soil formation, water cycling, nutrient cycling)

4.35 Jersey's ecosystem services have not been systematically assessed although a wide range of work has been undertaken by the Department of Environment which relates to specific elements such as biodiversity, landscape, water, marine resources and climate.

4.36 A comprehensive assessment of Jersey's ecosystem services and the natural capital which provide these services is an important first step to help determine how an ecosystem approach could be applied in Jersey and guide future policy and action. It will also establish a baseline against which changes and progress can be monitored in the future, linking with data gathered at the Jersey Biodiversity Centre.

4.37 The data used for the assessment will be drawn largely from existing strategies, plans, maps and other data held by the Department of the Environment. Where appropriate, proxy data and approaches from elsewhere may be used (e.g. from the UK National Ecosystem Assessment), where these can reasonably be applied to Jersey. A key output of the project will be to identify gaps in existing data to inform future research and data gathering.

STAFF ONLY

5 OUTSOURCED ACTIVITIES

5 OUTSOURCED ACTIVITIES

Protected Designation of Origin (PDO) and Certification Trademark

Owing to recent and near-future retirements the EMRE section will no longer have capacity or skills to offer the following marketing and promotional services. Additionally, it is believed that the activities listed in this section do not fit the Environment portfolio and would be conducted with a greater level of efficiency by Jersey Products Promotions Ltd (JPPL) in collaboration with Jersey Business as they have specific skills sets in these areas.

Jersey Products Promotions Ltd (JPPL)

5.1 Jersey Products Promotion Limited is an umbrella organisation, grant supported by the Department of Economic Development, Tourism, Sport and Culture and consists of the Genuine Jersey Products Association (GJPA) and the Jersey Export Group (JEG). The latter will ultimately be developed into 'Farm Jersey' which will encourage collaboration to further develop the Genuine Jersey and Jersey export brands in order to increase local sales for members of the Genuine Jersey Products Association, as well as new export initiatives for Island producers. The development of a common marketing and export strategy across the rural sector, will help create a critical mass and variety of world class products and that will help make local produce more available and more attractive to critical new markets overseas. Working in closer partnership with Jersey Business and Visit Jersey, Farm Jersey will help to better connect consumers to producers, promote local food production, showcasing the best that Jersey has to offer, whilst creating ambassadors to promote the Island's other industries and encourage inward investment

5.2 JPPL is responsible for on and off-Island marketing initiatives and continuing to develop the Genuine Jersey and Jersey Export brands in order to increase local sales for members of the GJPA, plus export initiatives for Island producers under the JEG.

Aim OA 1

Protected Designation of Origin (PDO) and Certification Trade Mark

Outsourcing of marketing and promotional services to Jersey Products Promotion Limited in light of staff changes and organisational review.

KPI = hand-over to JPPL complete Q4 2017.

Policy OA 1

Protected Designation of Origin (PDO) and Certification Trademark (EDTSC & DoE)

The Government of Jersey will consolidate brand development and protection within Jersey Products Promotion Limited (JPPL) and JPPL should seek further market opportunities to exploit PDO and Trade Mark benefits. Regulation of PDO activities will remain with the Agricultural Inspectorate.

5.3 The Agriculture and Fisheries Committee was granted a Protected Designation of Origin (PDO) for the Jersey Royal in 1996 meaning that the Jersey Royal potato must be grown in Jersey as its uniqueness comes from the local seed, the Jersey climate, location and growing methods; its qualities and characteristics are essentially derived from the Island.

5.4 A PDO ensures that the product is protected from imitation throughout the European Union (EU) and gives the consumer confidence that they are buying a quality product with a known provenance. It gives the producer a Unique Selling Point (USP) which differentiates, in this case, the Jersey Royal from other early potatoes which is important as there is intense and growing competition in the early potato market. Jersey Royal potatoes are recognised as a niche, high value, premium product within the marketplace.

5.5 A PDO has no owner as such and anyone who complies with the PDO specification can use it. However, the inspection body (the Agricultural Inspectorate) must agree that the product conforms to the registered specification. The PDO is therefore paramount in ensuring that Jersey Royals exported from the Island have been grown according to the specification.

Promotion

5.6 From 2016 Defra will be using Protected Food Names (PFN) and the UK Protected Food Names Association (UKPFNA) to actively support, promote and develop sales of produce by using PFN as a flagship in the Great British Food Campaign.

Certification

5.7 A new framework agreement for local authorities operating as inspection bodies in respect of various regulations in relation to quality schemes and agricultural products and foodstuffs is also being produced. In our case this role is provided by the Government of Jersey through the Agricultural Inspectorate.

5.8 For Jersey, this framework agreement will specify the arrangements to be put in place and implemented by the Government of Jersey, with the Agricultural Inspectorate acting as an inspection body for the purposes of EC Regulation 1151/2012 on quality schemes for agricultural products and foodstuffs.

5.9 This will ensure that there is a legally enforceable agreement for the provision of certification activities clearly outlining the responsibilities of the certification body (Government of Jersey) and the producer.

Marketing of Agricultural Produce - PDO

5.10 In the Protected Designation of Origin application the Jersey Royal Potato is described as:

"First early grown for early production in Jersey. Produces yields of uniform long oval tubers. Medium - low dry matter. Firm cooked texture. Market - new season ware".



Figure 14 Protected Designation of Origin official logo

5.11 For many years the main Jersey Royal season has been from the beginning of April to the end of June (subject to weather). This was extended with the introduction of the autumn early crop and the very early protected (poly-tunnel and glasshouse) crop. Recently there has been even further extension of the product range (away from the PDO specified early salad potato) and marketing period, with the introduction of Jersey Royal Jacket potatoes and Jersey Royals being sold as late as the first week of August 2014 (Lidl - Ireland).

5.12 A number of commentators view these developments as diluting the premium brand which the Government of Jersey in conjunction with its growers have developed

over the past 130 years. The main reason, alluded to above, is that the consumer is no longer being supplied with an early, salad potato.

Monitoring and compliance

5.13 Monitoring of the PDO has identified a number of issues where grower actions have given cause for concern:

1. The attempted import of International Kidney seed from Scotland (no link to the original Jersey Royal clone grown and raised in Jersey) and to grow it on as a crop of Jersey Royals (2006/7).

This did not comply with the PDO and the imported seed was destroyed so as to safeguard the PDO.

2. The repeated multiplication and bulking up of Jersey Royal seed in England and Scotland after virus treatment.

Virus treatment

5.14 Viruses in seed potatoes can have a significant impact on crop quality (both seed and ware). Potatoes can be freed from viruses through *in vitro* meristem tip culture.

5.15 This process is carried out on behalf of the Department of the Environment at the Science and Advice for Scottish Agriculture (SASA), a Division of the Scottish Government Agriculture, Food and Rural Communities Directorate, facility in Edinburgh.

5.16 The resultant plants are maintained by SASA until required for bulking up and growing on for seed production.

5.17 This second example is more complicated and was felt to have the potential to undermine the brand image of Jersey Royal potatoes because there was the risk that the consumer may feel that extending the period the Jersey Royals were grown in the UK would not comply with the specification. The loss of PDO status would have repercussions with regards to the brand image of the Jersey Royal as no doubt it would initiate a "good press" story.

5.18 To minimise this risk discussions were held with the industry to;

1. Limit imports of virus reduced seed potatoes to 1.5% of the stock required for the planting of each companies scheduled area of production, and that bulking up/multiplication be for no more than 5 years from the initial freeing from virus.
2. Ensure that imported seed must be either labelled as certified Jersey Royal seed by SASA or have paperwork demonstrating full traceability back to the original Jersey Royal clonal material.

Certification Marks and Trade Marks

5.19 In order to further protect the Jersey Royal brand, The Jersey Royal (Logo) & Jersey Royal/Jersey Royals (words) have also been registered as both a certification mark and an ordinary trade mark in the UK and Jersey. Both (logo and words) were filed with the UK patent office on 21 June 2002 and have been duly granted. They were also registered under the Trade Marks (Jersey) Law, 2000 on 23 July 2007.

Regulation

5.20 The certification marks “Jersey Royal” and “Jersey Royals” are the property of the Government of Jersey and permission to use the marks is granted by the Certification Authority (EDTSC). Businesses can be granted permission to use the trade mark and/or logo provided that they meet specified criteria and pay the appropriate fees (in the case of non-potato goods). Should these criteria be met and approval given a licence agreement will then be issued and signed on behalf of EDTSC (“Licensor”) and by the applicant.

5.21 The guidelines make it clear that use of the Jersey Royal words and/or logo add value to the product that they are used on and that a fee will be paid to reflect this added value.

Vodka and gin

5.22 Applications have already been received to use the words Jersey Royal in association with both vodka and gin but to date no licence has been issued due to failure to agree mutually acceptable terms and conditions.

Jersey Royal Potatoes

5.23 Unusually the Jersey Royal potato is subject to both a PDO and Trade Mark, the PDO was granted for the uniqueness of the product and a trademark on the recognisable words and historic usage of the Jersey Royal brand. The Jersey Royal potato is not a recognised variety in the EU because it does not feature in the [European Cultivated Potato Database](#)⁽⁶⁹⁾, if it did it would have had the trademark application refused because a recognised variety cannot be trade marked.

5.24 This dual protection has caused issues because although the Government of Jersey controls the use of the Certification (Trade) Marks it does not control the use of the PDO. This means that whilst it can stop anyone using the words 'Jersey Royal' on goods it cannot stop the use of the words 'Jersey Royal' when used on Jersey Royal potatoes grown in Jersey according to the registered PDO specification.

Monitoring and compliance

5.25 There have been attempts to diversify potato product ranges by UK companies using names like Pembroke/Ayrshire/Cornish Royals, and recently in Jersey with names such as Jersey Jems, Jersey Pearls, Jersey Jackets and Jersey Amber. The former was successfully challenged but the use of the prefix 'Jersey' in relation to the different products does not contravene the PDO or Trade Mark.

69 <https://www.europotato.org/menu.php?>

5.26 There have also been a number of infringements in the UK market place where a number of nationally recognised companies have been selling International Kidney seed potatoes by inferring that they are the same product as grown in Jersey.

5.27 Spoor and Fisher (specialists in international intellectual property law) act on behalf of the Government of Jersey and in addition to taking successful action against the above, they have also been in discussion with Amazon, Google and Tesco about wording of adverts on their websites.

Jersey Products Promotion Limited (JPPL)

5.28 JPPL also has experience with trademarks having successfully applied for the Genuine Jersey mark and words in both Europe and China and it also has an ongoing application in the USA for a collective mark.

5.29 Having responsibility for agriculture related trademarks sitting within two areas of government (the present situation) is inefficient and JPPL is well placed to manage the Protected Designation of Origin (PDO) and the Jersey Royal (words and logo) trademark for the Jersey Royal potato. These are well recognised brands and the expertise to protect and develop these brands should sit within JPPL rather than across a number of Departments. Consolidation within JPPL will improve cost effectiveness and operational efficiency.



Figure 15 Genuine Jersey logo

5.30 However, it is recognised that there may be a perceived risk where JPPL is seen to be promoting these brands but is expected to police them at the same time. Here the role of the Agricultural Inspectorate is important in relation to the PDO as it is the nominated inspection body which ensures that the rules relating to use of the logo and labelling requirements are met and the product specification is adhered to, in order to meet the requirements of Article 37 of Regulation (EU) No 1151/2012. Therefore there is a clear division of responsibilities between promotion and protection.

5.31 There is less of an issue where the Trade Mark is concerned, in that potential issues are usually identified by a third party and referred (in future by JPPL) to Spoor and Fisher for further comment, and appropriate action is then taken following discussions between Spoor and Fisher and the Department.

5.32 Jersey Products Promotion Limited has a major role to play in the development of the Jersey brand through the interplay between its skills and local high quality agricultural produce.

BREXIT implications

5.33 It is understood that products having been approved by the EU will continue to have protection within the EU, provided there is a reciprocal arrangement in the UK. If EU law no longer applies to the UK, the PFN's would otherwise lose their protection in the UK unless such an arrangement is in place. Any such new relationship would need to be capable of applying to Jersey where the Island would wish to be included. The UK Government could remedy this by passing similar legislation and Defra were already drafting a Statutory Instrument for the enforcement and monitoring of PFN's in the UK at the EU's insistence before BREXIT. Until the UK exits the EU, the protection for PFN's would continue giving the UK Government time to introduce PFN legislation.

5.34 A country does not have to be a member of the EU to have its products protected within the EU. Colombia is an example where although clearly not a member of the EU, its coffee 'Colombian Coffee' has PFN status within the EU. The arrangement has to be reciprocal with EU products being protected in Columbia.

STAFF AND REVENUE

Benefits of Local Food Production

Aim OA 2

Benefits of Local Food Production

Outsourcing of marketing and promotional services to Jersey Products Promotion Limited in light of staff changes and organisational review.

KPI = hand-over to JPPL complete Q4 2017.

Policy OA 2

Benefits of Local Food Production (EDTSC & DoE)

The Government of Jersey will consolidate all promotional work related to agricultural produce within JPPL and Genuine Jersey. Genuine Jersey should promote local food production and consumption and highlight the benefits to the community and economy. It should identify, in conjunction with Jersey Business, the needs of hospitality professionals and Government of Jersey procurement and connect producers to consumers directly.

5.35 Farming faces mounting pressures through competition from cheaper imports and changing consumer tastes. More recently questions have been asked about the provenance of our food as a result of a number of food related scares (horse meat in processed food, *E.coli* contamination of fresh salads and *salmonella* contamination of local food).

5.36 The total market value for fresh produce in Jersey is approximately £15 million per annum.

5.37 Approximately 80% of locally consumed produce is imported from the UK including the M & S franchise which does not utilise local suppliers.

5.38 Waitrose sells approximately £10m (2014) worth of local products in its three Jersey stores and has the stated aim of increasing this to at least £20m. The sourcing and selling of local agricultural produce is a key part of the proposed increase and it is anticipated that this will be sourced from a local grocery 'hub'. As such, the local 'Hub' proposal with the backing of the Jersey Farmers Union and in cooperation with other smaller existing arable farmers, presented a real opportunity to profitably increase the output and sale of local fresh vegetables and capture a significantly increased level of the potential market.

5.39 A survey by the New Economics Foundation in 2001 found that £10 spent on local food in the UK is worth £25 for the local area, compared with just £14 when the same amount is spent in a supermarket on imported food: the same amount is worth more with local schemes as it stays in the area where its value increases as it is reinvested. Local initiatives help support a sustainable local industry, reduce imported produce and help diversification by providing an alternative to growing crops for export. These figures may be different for Jersey and the data slightly old but the underlying principle remains the same: that expenditure spent on local products circulated in Jersey and reinvested is more beneficial to the local economy.

Local food production under-pinning Jersey agriculture

5.40 Jersey struggles to compete on production and export of commodity produce against other jurisdictions due to economies of scale and prohibitive transport costs. Only niche, branded and protected produce such as Jersey Royal potatoes and Jersey milk products can be exported at profit. This means that local consumption of local produce is vitally important to maintaining the existing agricultural product mix.

5.41 A diverse local production base would assist in strengthening rotational practices by reducing soil nutrient enrichment and improving water quality. The loss of local food production would trigger a loss of industry expertise, skills and crop diversity.

5.42 The dairy industry has a distinct advantage over the local arable industry; it is protected from outside competition and market volatility by the licensing of liquid milk imports and so has a captive local market. The arable sector has no such protective measures and is at the mercy of dominant supermarkets, with entire teams dedicated to pursuing economies of scale and pushing down prices. This applies to exported Jersey Royal potatoes but is felt more keenly in the less profitable vegetable sector.

Signposting

5.43 Signposting local food is important. The National Farmers Retail and Markets Association (FARMA) and Waitrose define local food in terms of miles to market and use 30 miles as a guideline. There is also a clear need to differentiate between local and imported produce in store.

5.44 Food miles and carbon footprint can influence shopper decisions on food purchases and here local Jersey produce has a major advantage over its imported competition and much more could be made to highlight this fact.

Messages used to promote local food include:

- 'Buying local food cuts down on unnecessary transport'
- 'Local food travels shorter distances, needing less protective packaging, with less waste to recycle or to send to landfill'
- 'Fruit and vegetables are more likely to be seasonal if they're local, and it takes less energy to produce them'
- 'Local food retailers offer an outlet for the produce from smaller and mixed farms, helping them to survive and contribute to the beauty and diversity of the local countryside'

5.45 However, signposting and branding can only really help when there is a wide local offering but as local production has become more depressed by supermarket competition and cheap imports, local production has dwindled and many consumers including restaurateurs, a potentially huge market, complain that they cannot source what they require locally and are forced to buy imported produce.

Genuine Jersey Market Research

5.46 Market research undertaken in 2014 by Genuine Jersey shows that the desire to buy local is increasing. Although price will always be important, the survey finds that the number of people who value buying local is at its highest since the recession began in 2007. Other key findings are that 40% of those questioned said that knowing a product was local would exert a strong influence on their product choice and that 55% of local retailers felt that 'locally produced' was 'very important' (up from 24% in 2010).

Food Security

5.47 The subject of food security, along with water and energy security are rising as priorities for governments globally and particularly in locations geographically isolated or reliant on complex transport links. The Government of Jersey has started exploring the issues around food security for Jersey and perhaps unsurprisingly the majority of fresh fruit and vegetables purchased on the Island are imported.

5.48 Food security remains high on the agenda, as food production is now seen as strategically important given the rising world population and food price volatility. A draft Food Security Strategy was prepared for consideration by the Council of Ministers which sets out four main objectives:

1. Securing the availability of food
2. Securing the affordability of food
3. Securing the ability to produce food
4. Securing against supply shocks

[Jersey Annual Social Survey \(JASS\)](#)⁽⁷⁰⁾

5.49 The Department of the Environment included a section of questions in the 2014 Jersey Annual Social Survey (JASS) to inform the development of a Food Security Strategy for Jersey.

5.50 Although a small proportion (3%) of people were unsure how long it would be before their household ran out of food at home, a third of people (32%) judged that their household would run out of food in 'a few days', and a slightly higher proportion felt they would last 'about a week'. A fifth (18%) thought they would have enough food to last around two or three weeks, whilst less than one in twenty (3%) had enough food to last a month or more, and a similarly small proportion had enough for 'a day or less'.

70 <https://www.gov.je/News/2014/pages/JerseyAnnualSocialSurvey2014>

5.51 The majority of people (85%) thought that the main supermarkets in Jersey would be able to keep their shelves stocked for about a week or less, if they suddenly didn't receive any deliveries from outside of Jersey. An additional 8% felt supermarkets would be able to keep their shelves stocked for 'around two or three weeks' under those circumstances.

5.52 In terms of where people felt the responsibility for making sure food is *affordable* should lie, there were higher proportions agreeing at some level that it is up to the Government to make sure food is affordable (90%), compared to those who agreed at some level that it was up to the supermarkets to make sure food is affordable (77%).

5.53 However, in terms of where residents felt the responsibility should lie for making sure food is *available* for Islanders day to day, a higher proportion felt that this was up to the supermarkets in Jersey (91%) compared to those who agreed it was up to the Government (73%). Although in an emergency situation, for example, if supplies were unable to get to Jersey, more people agreed that it would be up to the government to make sure there was enough food available for Islanders to buy. Three-fifths (59%) of residents thought that the Government of Jersey should have a stockpile of non-perishable foods for Islanders to buy in an emergency situation. When asked how long they felt this supply should last for, a range of opinions were given from one in ten (9%) saying up to a few days, a third (33%) suggesting 'about a week', and around a quarter suggesting 'around two or three weeks' (25%) or 'a month or more' (27%).

5.54 Few people (5%) felt that all the food needed to feed Jersey residents should be grown in Jersey rather than imported, although half (50%) thought that 'most' of the food needed should be grown in Jersey, with some imports for variety. Two-fifths (39%) thought that 'some' of the food should be grown in the Island, with most being imported. Less than 1% felt that 'none' of the food needed should be grown in Jersey.

5.55 A quarter of households (27%) in Jersey reported growing some of their own vegetables and about a fifth (18%) grew some fruit. One in eight (13%) fished (including for shellfish) for their own consumption. Much smaller proportions of households (around one in a hundred) kept animals for eggs, meat or milk.

5.56 The majority of the public felt that that the Government of Jersey should have a stockpile of non-perishable foods for Islanders to buy in an emergency situation (2014 JASS). Agricultural land for local production should be given the highest level of protection and the implementation of the Food Security Strategy would help in securing the availability and ability to produce food locally to secure against supply shocks and help protect local farming. Should local production fall away, this will result in Jersey becoming almost totally reliant on imported food and potentially vulnerable to supply shocks.

STAFF & REVENUE

Organic Farming Action Plan

Aim OA 3

Organic Farming Action Plan

To provide assistance to the organic farming sector in the delivery of their Organic Action Plan.

KPI = hand-over to JPPL complete Q4 2017.

Policy OA 3

*Organic Farming Action Plan (DoE)

The Government of Jersey should pass coordination of the Organic Action Plan to JPPL to be implemented in collaboration with the organic sector and Jersey Business, as much of the emphasis is on market/business initiatives. Collectively they should explore and promote production efficiency, cooperation and a market focused approach. The Environment Department will provide technical input as required. In addition to this organic farmers will receive financial support and access to resources similar to other rural industries via the Rural Support Scheme (RSS).

**This policy requires advisory input*

5.57 The area of organic and 'in-conversion' land in Jersey increased from approximately 1300 vergées in 2005 to a peak of 2479 vergées in 2008 and declined to 890 vergées in 2015 (2.6% of the agricultural area in Jersey). The above growth was driven by generous Government conversion payments (£100 per vergée for the two year conversion period) followed by five year organic management agreements (£50 per vergée per year). These organic agreements ended in 2014 and much of the organic area created has reverted back to conventional production.

5.58 Organic support payments were delivered as part the Countryside Renewal Scheme (CRS) with approximately 25% of its annual budget being spent on organic conversion and maintenance agreements. In 2012 the CRS was replaced by the Countryside Enhancement Scheme (CES) with organic conversion payments transferred to the Rural Initiative Scheme (RIS), based on sound business planning. However, the five year organic maintenance agreements were discontinued as the environmental benefits they had purchased were lost by the reversion of much of this land back to conventional production.

5.59 The Jersey Organic Association (JOA), concerned about the above development and for the future of organic farming in Jersey, requested that a review of the sector be undertaken in relation to the current support it receives in comparison to its competitors in neighbouring jurisdictions. The Strategic Review of Organic Farming funded by the CES was completed in January 2013 and an “Action Plan to support Organic Farming 2014” was developed from that report and published in December 2013 as a result of co-operation between the Jersey Organic Association, Jersey Business and the Government of Jersey Environment and Economic Development departments.

STAFF & REVENUE

Farming Conference and Paris Salon International de l'Agriculture (SIA)

Aim OA 4

Jersey Farming Conference and Paris Salon International de L'Agriculture (SIA)

To outsource the coordination of Jersey’s attendance at the SIA and the Jersey Farming Conference to Jersey Product Promotion Limited in light of staff changes and organisational review.

KPI = hand-over complete Q1 2017.

Policy OA 4

*Jersey Farming Conference and Paris Salon International de L'Agriculture (SIA) (EDTSC & DoE)

The Annual Farming Conference should be continued but coordinated by JPPL as its annual forum with a wider remit covering technical, marketing and societal issues.

The Paris SIA should in turn be used by JPPL to showcase Jersey rural products and initiatives.

**This policy requires advisory input*

5.60 The first Jersey Farming Conference took place on 10 November 2011 with over 100 delegates attending. The conference has continued to be popular under the themes 'Vision for the Future', 'Investing for the Future', 'Technology and Innovation', 'Growing the Rural Economy', and 'Keep Jersey Farming' in 2015, in conjunction with the JEP's campaign, gaining wide local media coverage. In 2016, the conference was entitled 'Sustainable Farming' and was used largely to launch this document and the Rural Support Scheme.

5.61 The objective of the conference is to:

- Discuss and update the vision for Jersey's rural economy
- Acknowledge the local and international challenges faced by Government and rural businesses in Jersey
- Address the issues surrounding the sustainable use of the Island's natural resources
- Empower industry members to comment on Government policy in an open forum

5.62 The conference is maturing into a valuable forum for open discussion, with farmers and growers becoming less reticent to comment and question. It also gains good press coverage highlighting rural issues and pushing these up the political agenda.

5.63 It is suggested that it be allowed to evolve further into a cross-industry event and be used as a platform for discussion on processing infrastructure, marketing and promotion and encouraging linkages between producers and users. With this in mind JPPL will be better placed to take this forward.

STAFF & REVENUE

Processing Infrastructure

Aim OA 5

Processing Infrastructure

To identify business needs, capital equipment and training requirements in order to facilitate added value processing activities on Island, rather than off-Island.

KPI = hand-over to JPPL complete Q4 2017.

Policy OA 5

Processing Infrastructure (EDTSC & DoE)

The Government of Jersey should expand the remit of Genuine Jersey to work in conjunction with Jersey Business to identify business needs, capital equipment, training requirements, mentoring and funding requirements and investigate whether the Government of Jersey should emulate the [Courtauld Commitment](#)⁽⁷¹⁾.

5.64 The previous Rural Economy Strategy recommended the Government of Jersey conduct a processing infrastructure survey to identify opportunities and investment requirements to encourage the reduction in useable waste and to encourage the production of a wider range of demand driven food crops’.

5.65 In the meantime the Courtauld Commitment 3 was launched in May 2013 which ran until 2015. This is a voluntary agreement aimed at improving resource efficiency and reducing waste within the UK grocery sector. It supports the UK governments’ policy goal of a ‘zero waste economy’ and objectives to reduce greenhouse gas emissions as part of plans for climate change mitigation and adaptation.

71 <http://www.wrap.org.uk/node/14507>

5.66 The draft report on the processing infrastructure was produced at the beginning of 2014. The main findings were:

- There are few potential users of food infrastructure but those that do exist have a broad range of differing needs
- Bringing producers, retailers and service providers together within a Jersey Food and Farming Conference would provide a platform through which their ongoing business support needs could be identified
- The infrastructure to utilise these waste streams is in place; what is missing, in many ways, is the incentive

5.67 The facilities are adequate but there needs to be a co-ordinating body to determine need and to facilitate networking between producers and operators of the infrastructure.

5.68 It is suggested that JPPL and/or Genuine Jersey could be the coordinating body and the already established annual Jersey Farming Conference would provide a vehicle for the discussions needed.

STAFF ONLY

Appendix I: Multilateral Environmental Agreements and Conventions

Appendix I: Multilateral Environmental Agreements and Conventions

	Convention	Relevant local legislation or policy
AEWA	African-Eurasian Water bird Agreement (AEWA) - Treaty extended	Conservation of Wildlife (Jersey) Law 2000 - all species of wild birds under AEWA protected under this law. Jersey Island Plan 2011 and Protected Areas Strategy (in draft)
ASCOBANS	Agreement on the Conservation of small cetaceans of the Baltic, North East Atlantic, Irish and North Seas (ASCOBANS) - Agreement extended but not Amendment	The Coastal Zone Management Strategy 2009
BASEL	Basel Convention of the Control of Transboundary Waste, Movements of Hazardous Wastes and their Disposal - Treaty & Amendment extended but not Protocol	Updates to Law made in 2012 to refer to updated EU legislation (Waste Shipment Regulation 259/93 has been revoked and replaced by Regulation 1013/2006; Waste Framework Directive 75/442/EEC has been revoked and replaced by EC Directive 2008/98/EC)
BERN	Convention on the Conservation of European Wildlife and Natural Habitats (Bern)	Jersey Island Plan 2011 and Protected Areas Strategy (in draft) Conservation of Wildlife (Jersey) Law 2000 Planning and Building (Jersey) Law 2002
BONN		Island Plan 2011 - National Park Conservation of Wildlife (Jersey) Law 2000
CBD	Convention of Biological Diversity (CBD) - Treaty extended but not Protocol	Biodiversity Action Plans and Land Management Plans Planning & Building (General Development)(Jersey) Order 2011

	Convention	Relevant local legislation or policy
		Island Plan 2011 Nagoya agreements (CoP10) Conservation of Wildlife (Jersey) Law 2000
CITES	Convention on International Trade in Endangered Species (CITES)	Endangered Species (Jersey) Law 2012
CLRTAP	UNECE Convention on Long Range Transboundary Air Pollution and Associated Protocols (CLRTAP)	
CMS	Convention on the Conservation of Migratory Species of Wild Animals (Bonn) Treaty extended	Jersey Island Plan 2011 Conservation of Wildlife (Jersey) Law 2000 Biological Monitoring Strategy Planning & Building (General Development)(Jersey) Order 2011
ESPOO	Convention on Environmental Impact Assessment in Transboundary Convention (ESPOO) - Treaty extended but not the 2 Amendments or Protocol	PP1 Jersey Island Plan 2011
EUROBATS	Agreement on the Conservation of European Bats (EUROBATS) - Agreement & 2 Amendments (1995 & 2000)	Jersey Island Plan 2011
GRANADA	Convention for the Protection of the Architectural Heritage of Europe (Granada) - Treaty extended	Revised designation of historic assets ref
IPPC	International Plant Protection Convention	Jersey Plant Health Law and Order

	Convention	Relevant local legislation or policy
KYOTO (UNFCCC)	United Nations Framework Convention on Climate Change Kyoto Protocol to above Convention	Pathway 2050:Energy Plan approved May 2014 outlining plans to meet 80% emissions reduction target; Energy Partnership formed August 2014; Climate Change adaptation strategy commenced development Q4 2014
London	Convention on the Prevention of Marine Pollution by Dumping of Wastes and other Matter 1972 - Treaty & Protocol	FEPA 1987 provides framework for licensing of deposits in the sea.
Migratory Birds	Memorandum of Migratory Birds of Prey in Africa and Eurasia	
OSPAR	Convention for the Protection of the Marine Environment of the North East Atlantic (OSPAR)	
OSPAR	Annex 1	Water Pollution Law (Jersey) Law,2000
OSPAR	Annex 2	Water Pollution Law (Jersey) Law,2000
OSPAR	Annex 3 - N.B. currently articles are complied with via Marpol and London Dumping convention. Potential future issue if offshore renewables are developed.	Marine Resources Strategy WFD assessment of St Aubin's Bay
OSPAR	Annex 4	Marine Resources Strategy WFD assessment of St Aubin's Bay
OSPAR	Annex 5 - unclear if extended to Jersey. DoE currently working to this as good practice.	Marine Resources Strategy WFD assessment of St Aubin's Bay
RAMSAR	Ramsar Convention on Wetlands of International Importance especially as a Waterfowl Habitat - Treaty, Amendment & Protocol extended	Ramsar management Plans

	Convention	Relevant local legislation or policy
VIENNA Treaty and MONTREAL protocol	UN Vienna Convention for the Protection of the Ozone layer - Treaty & Protocol below extended Montreal Protocol to above Convention	<p>As R22 (Chlorodifluoromethane) is classified as a substance that depletes the ozone level under Annex 1 or II of EC Regulation 1005/2009, its importation or exportation into and out of Jersey is restricted by the Customs and Excise (Import and Export Control (Jersey) Order 2006</p> <p>The notification procedure under the Waste Management (Jersey) Law 2005 and EC Regulation 1013/2006 on shipments of waste must be followed for waste refrigerant gasses to be exported from Jersey lawfully. The destination sites for these gasses will either recover or destroy such gasses depending on the market and timing, which will be affected by the EU ban on the use of R22 gasses for plant servicing and maintenance that comes into force on 1st January 2015 across EU Member States</p>

Table 14 Multilateral Environmental Agreements and Conventions

Appendix II: The Convention on the Conservation of Biological Diversity's Aichi Targets

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Target 3

By 2020, at the latest, incentives, including subsidies, harmful to biodiversity are eliminated, phased out or reformed in order to minimize or avoid negative impacts, and positive incentives for the conservation and sustainable use of biodiversity are developed and applied, consistent and in harmony with the Convention and other relevant international obligations, taking into account national socio economic conditions.

Target 4 - By 2020, at the latest, Governments, business and stakeholders at all levels have taken steps to achieve or have implemented plans for sustainable production and consumption and have kept the impacts of use of natural resources well within safe ecological limits.

Target 7

By 2020 areas under agriculture, aquaculture and forestry are managed sustainably, ensuring conservation of biodiversity.

Target 14 - By 2020, ecosystems that provide essential services, including services related to water, and contribute to health, livelihoods and well-being, are restored and safeguarded, taking into account the needs of women, indigenous and local communities, and the poor and vulnerable.

Target 15

By 2020, ecosystem resilience and the contribution of biodiversity to carbon stocks has been enhanced, through conservation and restoration, including restoration of at least 15 per cent of degraded ecosystems, thereby contributing to climate change mitigation and adaptation and to combating desertification.

Target 19

By 2020, knowledge, the science base and technologies relating to biodiversity, its values, functioning, status and trends, and the consequences of its loss, are improved, widely shared and transferred, and applied.

Target 20

By 2020, at the latest, the mobilization of financial resources for effectively implementing the Strategic Plan for Biodiversity 2011-2020 from all sources, and in accordance with the consolidated and agreed process in the Strategy for Resource Mobilization, should increase substantially from the current levels. This target will be subject to changes contingent to resource needs assessments to be developed and reported by Parties.

Appendix III: Laws Administered

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Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974

Agricultural (Loans and Guarantees) (Jersey) Law 1974

Agricultural (Loans) (Jersey) Regulations 1974

Agricultural Returns (Jersey) Law 1947

Animal Health (Jersey) Law 2017 (soon to be enacted)

Animal Welfare (Jersey) Law 2004 (as amended)

Animal Welfare (Poisons) (Jersey) Order 2007

Artificial Insemination of Domestic Animals (Jersey) Law 1952

Artificial Insemination of Domestic Animals (Bovine Semen) (Jersey) Order 2008

Artificial Insemination of Domestic Animals (Jersey) Order 2008

Blight Disease (Jersey) Order 1982

Certificates of Origin (Produce of the Soil) (Jersey) Law 1961

Conservation of Wildlife (Jersey) Law 2000

European Communities Legislation (Implementation) (Jersey) Law 1996

European Communities Legislation (Implementation) (Cattle Identification) (Jersey) Regulations 2002

Community Provisions (Animal Feeding) (Jersey) Regulations 2005

European Communities Legislation (Implementation) (Bovine Semen) (Jersey) Regulations 2008

European Communities Legislation (Bluetongue) (Jersey) Regulations 2008

Fertilizers and Feedstuffs (Jersey) Law 1950 and subordinate legislation

Food and Environment Protection Act 1985 (Jersey) (Amendment) Order 1997

Planning and Building (Jersey) Law 2002

Medicines (Jersey) Law 1999

Food Safety (Jersey) Law 1966

Milk and Dairies (General Provisions) (Jersey) Order 1992

Pesticides (Jersey) Law 1991

Pesticides (General Provisions) (Jersey) Order 1991

Pesticides (Maximum Residue Levels in Food) (Jersey) Order 1991

Plant Health (Jersey) Law 2003 (Appointed Day) Act 2005

Plant Health (Jersey) Order 2005

Protection of Agricultural Land (Jersey) Law 1964

Slaughter of Animals (Jersey) Law 1962

Stem and Bulb eelworm (Jersey) Order 1971

Veterinary Surgeons (Jersey) Law 1999 and subordinate legislation

Waste Management (Jersey) Law 2005

Water Pollution (Jersey) Law, 2000 (Inc. Water Code (Jersey) 2009)

Water Resources (Jersey) Law 2007

Weeds (Jersey) Law 1961

Appendix IV: Nitrate Working Group Recommendations

Appendix IV: Nitrate Working Group Recommendations

The group made the following recommendations and findings. The group have made it clear that the recommendations should be taken together as a package of measures.

How best to achieve a nitrate level (NO₃) in groundwater and surface water of less than 50mg/l.

A. General measures to inform, encourage and incentivise and codes of good practice

- i. A code of good practice should be introduced for everyone who discharges domestic waste water to a private system. This could replace the current system of (non-mandatory) discharge permits.
- ii. Bio-solid production and spreading to land on the Island should comply with sewage sludge regulations and the safe sludge matrix. All applications must be recorded in commercial user's nutrient management plans.
- iii. The Code of Good Agricultural Practice for the Protection of Water should be updated by the States of Jersey. Adherence to the Water Code is currently a condition for the receipt of Single Area Payment (or future States agricultural support) and this should continue to be a condition of any States of Jersey financial support to agriculturalists.
- iv. The States of Jersey should continue to invest in the sewerage network and facilities and the extension of mains drains.
- v. All imports, sales and use of inorganic fertilisers and lime should be recorded. This will include non-agricultural commercial activity such as golf courses, garden centres, TTS Parks and Gardens etc.
- vi. Advice and training on good practice should continue to be provided for farmers.
- vii. Uptake of precision agricultural systems (especially fertiliser placement machinery) designed to help increase productivity and protect the environment by minimising nutrient use and leaching should be encouraged.
- viii. An advisory leaflet for domestic users of herbicides, pesticides and fertilisers should be produced (to be distributed via retail outlets).
- ix. The catchment protection measures recommended by the Nitrates Working Group should be monitored (this increased compliance checking to be supported by SOJ & JW).
- x. Where voluntary measures are insufficient then regulation/legislation to achieve the desired outcome should be considered.

B. Cultivations and land use

- i. Autumn agricultural cultivations should only be carried out prior to planting an autumn sown crop.
- ii. Cover crops or second crops should be sown or planted as soon as possible after harvest.
- iii. Selected vulnerable water courses that are permanently grazed and accessed directly by cattle should be fenced off.

C. Soil Testing

- i. Representative Soil Mineral Nitrogen testing prior to the planting season for the Jersey Royal potato should be continued so that the available soil nitrogen is assessed in a number of fields.
- ii. Soil testing on all fields/areas used by commercial agricultural and commercial non-agricultural users of fertilisers and/or organic manures should be undertaken once every three years to provide an analysis of the soil pH, P and K indices.

D. Nutrient Management and Planning

Comprehensive nutrient and soil management and planning is essential to reduce nitrogen usage and to minimise nitrates in Jersey's water.

- i. The pH of Jersey soils is generally below the optimum for nutrient uptake by plants. The pH of local agricultural soil needs correcting with lime applications to achieve a pH of at least 5.5, preferably 6 to 6.5 for optimum nutrient availability and efficiency of use.
- ii. Nutrient management planning and recording is currently a requirement for all those claiming Single Area Payment (SAP). Organic manure management planning and recording is currently a requirement for those claimants of the SAP who import or produce and utilise organic wastes but is not being carried out effectively by some. This should be extended to a requirement for ALL commercial producers and appliers of organic manures and wastes to land to record and account for production and disposal/spreading.
- iii. It is recommended that in Jersey all commercial users (e.g. SOJ Parks and Gardens, Golf Courses, Agriculturalists etc.) of nutrients should be planning and recording nutrient use annually including any organic manures applied. Evidence should be provided as to how the amount of fertiliser applied to each field/area was calculated under good practice guidelines (e.g. crop need using RB209). This plan will include a requirement for record keeping for 3-5 years and records of actual applications.

iv. Precision use of Nitrogen. There is no advantage to applying more than the economic optimum to potatoes or any other crop. The response of crop production to fertiliser N and P is relatively flat in the region of the economic optimum but over-fertilising has a disproportionately great impact on N leaching losses. There is an opportunity to make a small reduction in N fertilisation that would have little impact on the economic return but reduce the risk of inadvertent over fertilisation and subsequent nitrogen leaching. The industry has proposed to adopt a target to reduce applied nitrogen by between 5 and 10% over the next 3 years. It is recommended that this is done by working out the whole farm fertiliser requirement from the nutrient management plan (NMP), including taking into account organic manure application, and then apply 95% of that for the 2015-16 season. This amount to decrease to 90% of an individual users NMP being applied by 2018/2019.

E. Precision Fertiliser and Organic Manure applications

Precision application is key to reducing Nitrogen losses and making sure the fertiliser or manure is applied in the right place, at the right time in the right quantity. Targeted, planned and integrated organic manure application is key to good use of nutrients and avoiding losses to water.

- i. There should be a move to fertiliser placement rather than spinning disc application where the crop is suitable for this method.
- ii. All current fertiliser spreaders should have deflector plates fitted, properly trained drivers and all commercial spreaders should have a regular (annual) calibration certificate.
- iii. A 5m 'no spread' buffer strip for fertiliser should be introduced in areas next to watercourses (a 10m buffer already applies to manures and wastes)
- iv. A 1m 'no spread' buffer strip for fertiliser spreading next to banks and hedges should be introduced.
- v. Splash plates for slurry application should be checked and calibrated annually to ensure the spread pattern and quantity are calculated correctly.
- vi. Slurry, FYM and other organic manures should be incorporated within 24-48 hours except when applied to a growing crop.
- vii. A maximum field application limit of 170kgN/Ha per annum for animal manure should be introduced.
- viii. Closed period. All the evidence from Europe points to a closed autumn period for the spreading of liquid manures being necessary for nitrate pollution reduction. The recommendation is that Jersey continues with the closed period. There may be some negotiation possible for flexibility dependant on October weather conditions as long as stores are empty at the start of the closed period.

ix. No slurry applications to loafing paddocks and other heavily grazed fields as deposition loading is high on these fields.

f. Organic Manure Storage Facilities

i. There should continue to be a periodic review of slurry storage capacity by all producers to ensure storage is adequate for livestock numbers as part of their manure management planning process.

ii. Limits to storage facilities should not lead to applications to land of organic manures (OM) (FYM, sewage sludge, compost, WTW sludge, slurry) in unsuitable conditions e.g. when the soil is waterlogged or compacted.

iii. Field storage of commercially produced organic manures (OM). Organic manure to be stored for a maximum of 12 months at the same location. Within 2 years of removal from that location, new heaps must not be placed at the same location. The producer or holder of the OM should maintain annual records of the heaps. The records should include information of the period of storage and location at the fields.

Appendix V: EPPPO and Colorado Beetle Local History

Appendix V: EPPO and Colorado Beetle Local History

Colorado Beetle (CB) (believed to originate from South America) was first detected in Europe in Germany in 1877 but was eradicated. It established around WWI military bases in Bordeaux probably having arrived in freight from the USA. It then spread through France and Spain reaching Belgium and the Netherlands by WWII. By 1933 the Governments of the Channel Islands were becoming anxious at the close proximity of the pest and began preparation to protect Jersey's valuable 3000ha potato industry and Guernsey's 250ha outdoor tomato industry. Both jurisdictions wished to remain free of CB and continue to export crops to the English mainland, so began education of growers and the public of the risks of local CB establishment whilst stock piling lead arsenate and carbon disulphide pesticides.

Jersey remained CB free until an isolated outbreak in 1939, despite its prevalence on the adjacent Cotentin Peninsula, but with the onset of Occupation in WWII controls could not be maintained and CB became established in Jersey in 1943.

At Liberation in May 1945 there were 45 established colonies in the Island and steps were taken to successfully eradicate these and re-establish exports of potatoes; legislation was adopted to licence potato production, prevent planting in private gardens and introduce mandatory inspections and pesticide treatments.

May 1947 saw the first sea-born invasion of CB from the Cotentin enabled by climatic conditions; hundreds of live beetles were deposited onto growing potato crops and thousands of dead beetles were washed ashore across the Channel Islands at the height of the potato season. The effects for Jersey were serious and costly; harvest was stopped, labour diverted to control and eradication measures and exports halted.

At this time there was no link with French authorities but this was achieved after the formation of the European Colorado Beetle Committee in 1947-1948 aiming to coordinate control and warning measures. The Committee formed close relationships with relevant personnel across the Channel Islands and France, receiving whole-hearted approval from all Governments.

The European Colorado Beetle Committee evolved into the European Plant Protection Organisation (EPPO) with Jersey, Guernsey, France and the UK becoming contributing members in 1951. EPPO has grown to encompass 50 member countries, including nearly every country in the European and Mediterranean region, serving as a valuable source of technical information and training, particularly in recognition, control and eradication of emerging threats.

The historic Channel Islands Colorado Beetle Campaign remains cited as one of the most successful collaborative insect pest control and eradication efforts ever conducted, and continues to this day.

Appendix VI: Abbreviations

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BAP Biodiversity Action Plans

BASIS British Agrochemical Standards Inspection Scheme

BSE Bovine Spongiform Encephalopathy

CAP Common Agricultural Policy

CGAEP Codes of Good Agricultural and Environmental Practice

CIBO Channel Islands Brussels Office

CITES Convention on International Trade in Endangered Species

CES Countryside Enhancement Scheme

CNP Coastal National Park

CRS Countryside Renewal Scheme

DICS Dairy Industry Costings Scheme

DFI Department for Infrastructure

DoE Department of the Environment

EBITDA Earnings Before Interest Tax, Depreciation, and Amortisation.

EDTSC Department of Economic Development, Tourism, Sport and Culture

EMRE Environmental Management and Rural Economy

EPGDP Economic and Productivity Growth Drawdown Provision

EPPO European Plant Protection Organization

EU European Union

FACTS Fertiliser Advisers Certification and Training Scheme

FARMA The National Farmers Retail and Markets Association

FHP Farm health planning

FMD Foot and Mouth Disease

GAEP Good Agricultural and Environmental Practice

GJPA Genuine Jersey Products Association
GMO Genetically Modified Organisms
GVA Gross Value Added
HSSD Health and Social Services Department
IPPC International Plant Protection Convention
JASS Jersey Annual Social Survey
JEG Jersey Export Group
JFU Jersey Farmers Union
JLO Jersey London Office
JMMB Jersey Milk Marketing Board
JOA Jersey Organic Association
JPPL Jersey Products Promotions Limited
LEAF Linking Environment and Farming
MTFP Medium Term Financial Plan
MEA Multi-lateral Environmental Agreement
NATMAP National Soil Map
NSRI The National Soil Resources Institute
NPTC National Proficiency Training Council
NRoSo National Register of Sprayer Operators
PCN Potato Cyst Nematode
PDO Protected Designation of Origin
PFN Protected Food Names
PMPS Plant-Made Pharmaceuticals
QMP Quality Milk Payment
R&D Research and Development

RES Rural Economy Strategy

RIS Rural Initiative Scheme

RJA&HS Royal Jersey Agricultural & Horticultural Society

RSS Rural Support Scheme

SAP Single Area Payment

SASA Science and Advice for Scottish Agriculture

SIA Paris Salon International de L'Agriculture

SLA Service Level Agreement

SSI Sites of Special Interest

SSP States Strategic Plan 2015-18

SVO States Veterinary Officer

TB Tuberculosis

WTO World Trade Organization

UK United Kingdom

UKPFNA United Kingdoms Protected Food Names Association

USP Unique Selling Point