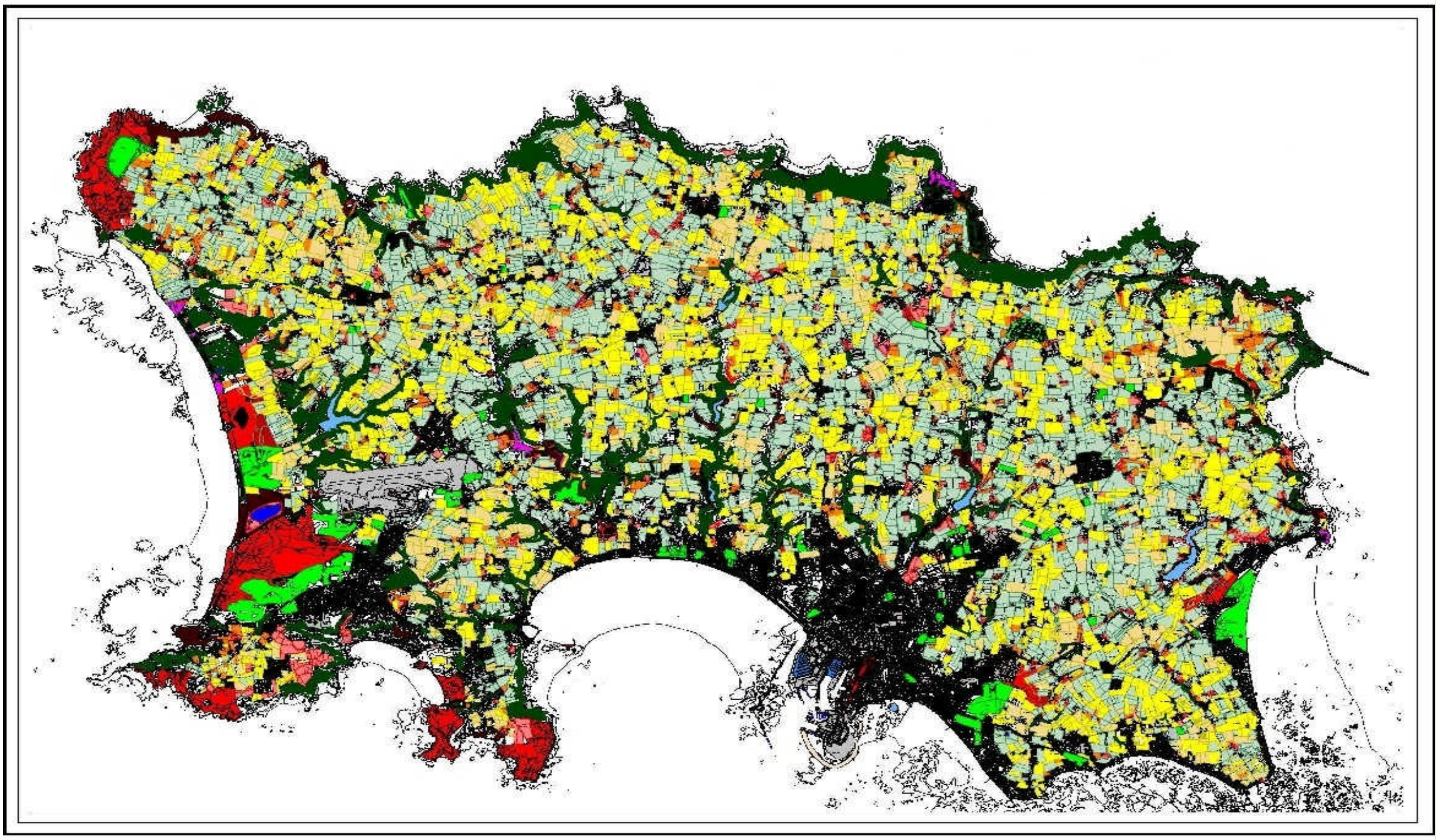
Rural Economy



Agricultural Statistics 2011

Economic Development

States of Jersey

ECONOMIC DEVELOPMENT
AGRICULTURAL STATISTICS FOR 2011

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AGRICULTURAL STATISTICS FOR 2011

Foreword

2011 has seen some positive developments in Jersey's agriculture industry, with more land devoted to growing Jersey Royals, an increase in the value of milk sold to Jersey Dairy and a growing demand for locally produced cider. We are even seeing new glass houses being built for a sector that had previously been in decline for many years.

In 2011 the area used to cultivate Jersey Royal potatoes expanded from 16,745 to 18,048 vergées, an increase of 8%. And the prevailing confidence in the future of the industry means there is still a demand for more land for potato production.

The gross sales value of the milk delivered to Jersey Dairy increased from £11,142,000 (86.4ppl) to £11,627,000 (91.46ppl). This represents a rise in total value of 4% and in sales value per litre of 6%. This increase illustrates the work Jersey Dairy has been doing to develop a value added export market. This concentrated effort has successfully prompted growth in both milk intake from dairy farmers and in financial returns from the market place.

One of Jersey's historical crops has seen a resurgence of interest in recent years and a growing demand for cider has prompted an increase in the area of land used for orchards which now stands at 134 vergées.

And in the protected crop sector 5,734 m^2 of new glass was built last year. This was the first new build for a number of years and in addition tomato production has increased by 72%.

The weather in 2011 made it a difficult growing year, with harvested yields down because of the drought conditions. However the export sales were only slightly down at £30.8M compared with £31.4M the previous year. This was because the 1,303 vergée expansion of Jersey Royals offset the lower yields.

When the Rural Economy Strategy was published last year, it stressed the importance of reducing barriers to greater productivity, protecting agricultural land, promoting collaboration in the food chain, and encouraging market focussed high value food production.

In 2011 Jersey Royal new potatoes remain Jersey's major fresh produce export, accounting for around 90% of total agricultural exports. But we are also seeing encouraging signs of growth in other sectors. Our traditional industries are part of the Island's heritage and we need to ensure that products like Jersey milk, tomatoes and cider continue to play their part in our rural economy, helping to safeguard Jersey's countryside, character and environment.

Deputy Carolyn Labey
Assistant Minister Rural Economy

AGRICULTURAL STATISTICS FOR 2011

This document summarises selected information collected from the agricultural returns completed in October 2011 by those who occupy or manage agricultural land of more than one vergée.

Agricultural Structure

Further revisions of the data has been undertaken and large gardens, woodland areas, scrubland etc have been identified and removed from the agricultural land bank in the 2011 data.

Table 1: AGRICULTURAL STRUCTURE (revised table)

Area of Jersey = 64,612 vergées	2007	2008	2009	2010	2011
Land areas					
Owned and farmed	8,865	9,117	9,107	9,306	9,072
Rented	26,250	26,567	28,029	27,100	27,797
Of which:					
Rented or leased from directors/farm	3,032	3,102	NR[1*]	NR	NR
Other rented land	23,218	23,465	NR	NR	NR
Total	**35,115**	**35,684**	**37,136**	**36,406**	**36,869**
Land Percentage					
Area of agricultural land (% of Island area)	54.3	55.2	57.5	56.3	57.1
Land Owned (% of agricultural land)	25.2	25.5	24.5	25.6	24.6
Land Rented (% of agricultural land)	74.8	74.5	75.5	74.4	75.4
Number of holdings [2*]					
1 - 10 vergées	347	332	307	286	270
Above 10 < 25 vergées	148	127	134	125	120
Above 25 < 50 vergées	61	62	59	62	65
Above 50 < 75 vergées	21	25	25	27	24
Above 75 < 100 vergées	7	8	8	5	7
Above 100 < 250 vergées	25	24	24	26	24
Above 250 < 500 vergées	16	18	15	16	17
Above 500 < 1000 vergées	7	8	11	6	7
Above 1000 vergées	3	3	3	5	5
Total	**635**	**607**	**586**	**558**	**539**

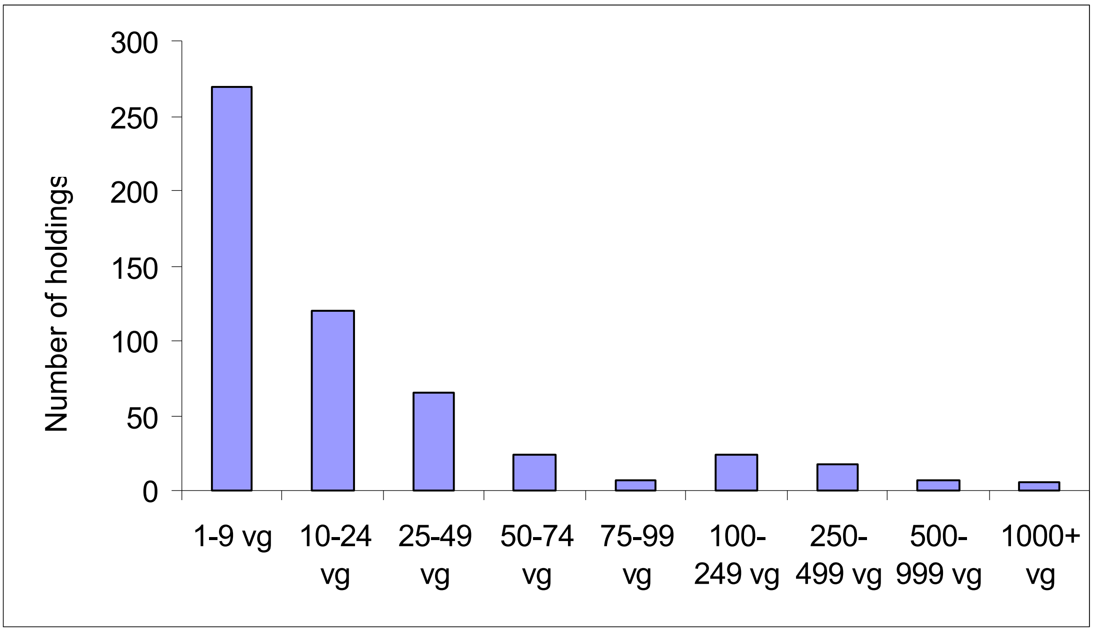
[1*] Not recorded

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

Table 2: MISCELLANEOUS DATA

Area of Jersey = 64,612 vergées	2007	2008	2009	2010	2011
Average size of holding (vergées)	55	59	63	65	68
Area irrigated (vergées)	1,782	313	1,615	1,782	2,302
Uncultivated land (vergées)	2,529	2,317	2,064	2,002	1,832
Uncultivated land as a % of agricultural land	7.2	6.5	5.6	5.5	5.0

Chart 1: Number of Holdings* 2011 – Distribution by size



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

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

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

Table 3: NUMBER OF HOLDINGS CLAIMING SAP and QMP

Holding size	2011 Total Holdings	2011 Businesses claiming SAP & QMP
1 - 10 vergées	270	1
Above 10 < 25 vergées	120	10
Above 25 < 50 vergées	65	16
Above 50 < 75 vergées	24	10
Above 75 < 100 vergées	7	4
Above 100 < 250 vergées	24	24
Above 250 < 500 vergées	17	16
Above 500 < 1000 vergées	7	4
Above 1000 vergées	5	5
Total	**539**	**90**
Total agricultural area (vg)	**36,869**	
Area on which SAP & QMP claimed (vg)		**27,342**
Area subject to SAP & QMP		**74.2 %**

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

Single Area Payment

36,869 vergées of land are classified as agricultural however not all tenants or owners of this land claim the Single Area Payment that they were entitled to.

Land eligible for the SAP will include all land used for agricultural activity, including livestock grazing, fields in a recognised arable rotation and fields used by commercial livery stables, provided the land user is either a bona fide agriculturalist or recognised as a smallholder. The SAP will be paid to the person who is responsible for the agricultural management of the land and in most cases this will be the legal tenant. The SAP may exclude certain Countryside Renewal Scheme (CRS) elements where there is no economic production (e.g. buffer zones) as the payment rate for these CRS components includes the loss of the SAP.

Quality Milk Payment

Dairy farms receive an additional payment which amounted to £180 per cow per in 2011.

Compliance

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

Table 4: FARM LABOUR *

Farm Labour	2007	2008	2009	2010	2011
Whole Time	678	737	684	714	669
Part Time	138	161	191	210	205
Seasonal or Casual Workers	1,031	920	910	863	1073
TOTAL	**1,847**	**1,818**	**1,785**	**1,787**	**1,947**

* Peak Season

Farm Labour

Full time employees showed a decrease of 6% to 669, part time staff decreased by 2% though seasonal and casual workers increased by 24%.

Chart 2: Exports (% value)

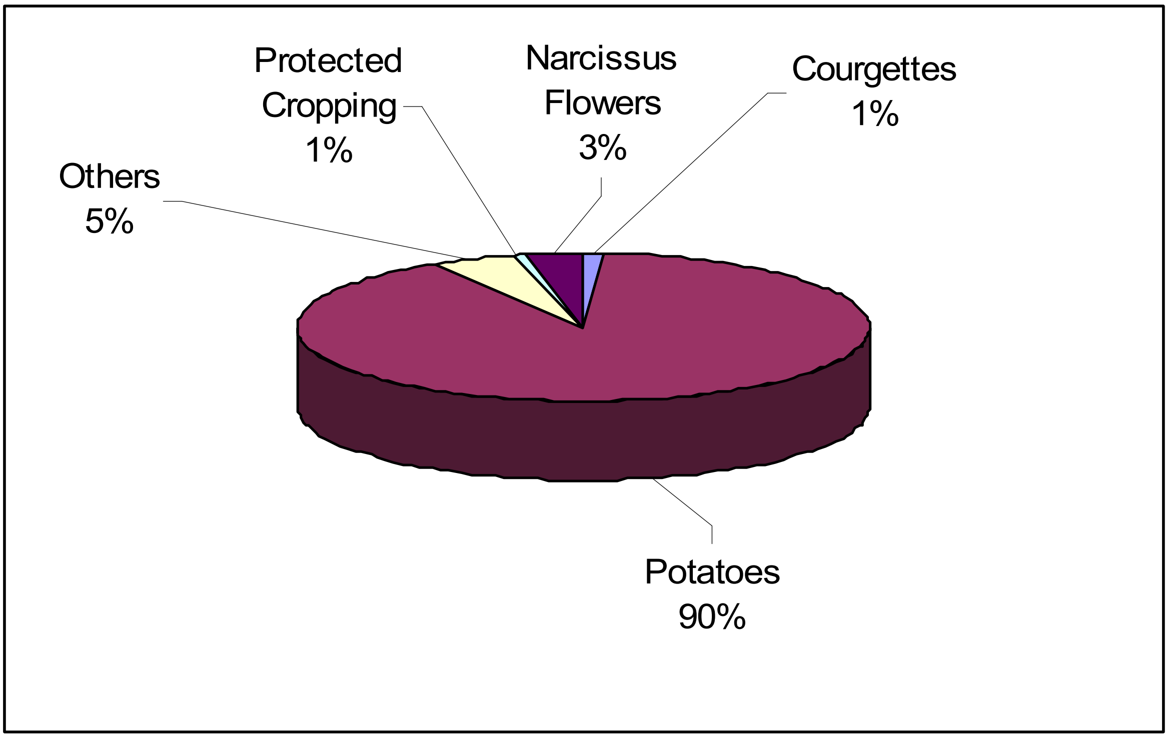


Table 5: VEGETABLE EXPORTS

	2007		2008		2009		2010		2011	
	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)
Beans	65	134,259	77	151,464	74	125,017	44	58,324	26	33,823
Cauliflower	33	30,671	58	88,691	68	108,982	55	96,491	58	97,974
Courgettes	735	695,763	715	678,249	1,001	789,511	591	584,106	524	423,902
Potatoes	32,316	23,327,774	28,706	24,476,056	37,631	27,141,633	30,478	31,449,761	30,890	30,837,079
Sweet Pepper	286	432,833	199	310,000	NA*2	NA	NA*2	NA	NA*2	NA
Tomatoes	2,941	4,081,372	2,273	3,400,000	NA*2	NA	NA*2	NA	NA*2	NA
Protected Cropping	NA	NA	NA	NA	349	256,093	238	199,556	264	206,923
Others	608	282,419	641	293,484	408	400,354	780	781,644	1,074	1,154,219
Total vegetables	**36,984**	**28,985,091**	**32,669**	**29,397,944**	**39,531**	**28,821,590**	**32,186**	**33,169,882**	**32,836**	**32,753,920**

*1 Not recorded

*2 Not available, included in protected cropping exports

Table 6: FLOWER EXPORTS

	2007		2008		2009		2010		2011	
Flowers	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**
Alstroemeria	NR	NR	513	12,502	NR	NR	NR	NR	NR	NR
Anemones	NR	NR	NR	NR	NR	NR	111	2,692	246	3,720
Carnation	1,604	31,502	NR	NR	NR	NR	NR	NR	NR	NR
Lilies	5,639	137,865	5,061	134,571	2,781	78,218	5,701	160,733	12,479	277,106
Narcissus Flowers	64,097	659,822	56,169	584,773	48,727	685,975	52,593	875,955	56,730	722,311
Pinks	NR	NR	567	10,401	469	8,410	283	5,785	NR	NR
Others	2,442	38,485	70	1,742	236	8,423	NR	NR	110	5,218
Sub total flowers	**73,782**	**867,674**	**62,380**	**743,989**	**52,213**	**781,026**	**58,688**	**1,045,165**	**69,565**	**1,008,355**

	2007		2008		2009		2010		2011	
Narcissus Bulbs (t)	**Tonnes**	**Value (£)**	**Tonnes**	**Value (£)**	**Tonnes**	**Value (£)**	**Tonnes**	**Value (£)**	**Tonnes**	**Value (£)**
Sub total bulbs	558	275,548	722	500,000	803	402,537	753	340,719	617	399,101
Total flowers and bulbs		**1,143,222**		**1,243,989**		**1,183,563**		**1,385,884**		**1,407,456**
Total value of all crops		**30,128,313**		**30,641,933**		**30,005,153**		**34,555,766**		**34,161,376**

Outdoor Crops

Potatoes

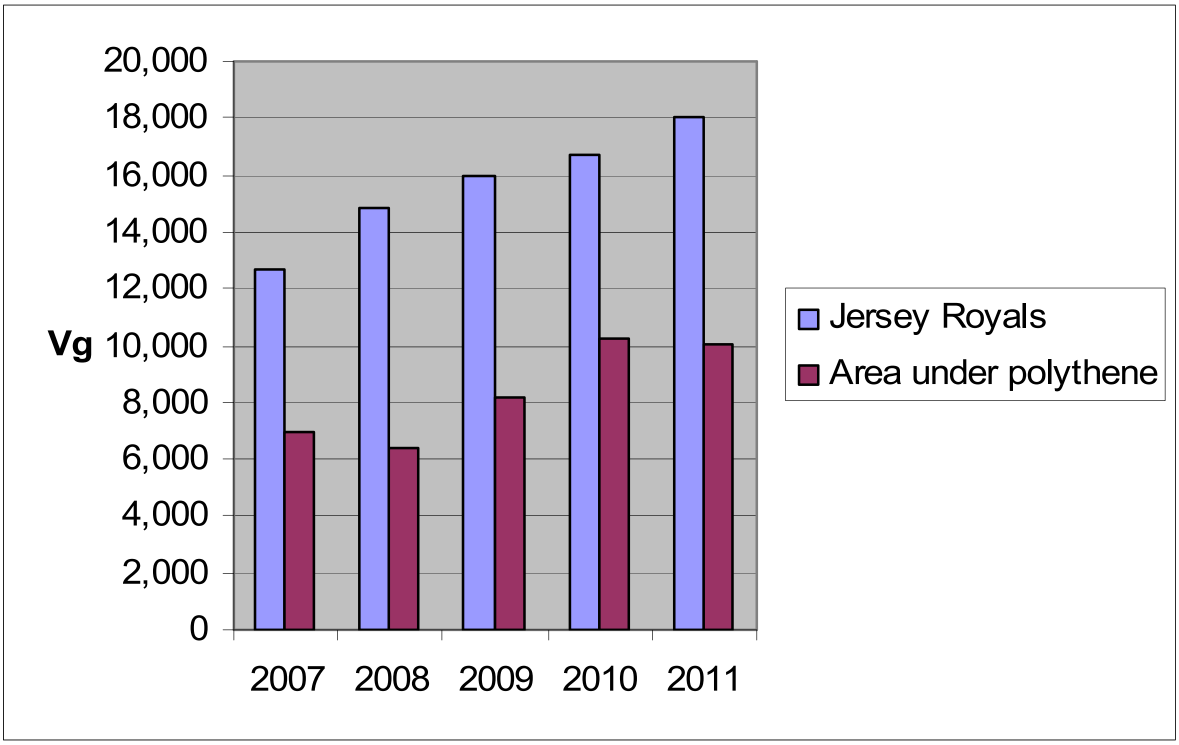
Table 7: POTATO AREAS

Vergées	2007	2008	2009	2010	2011
Potatoes					
Jersey Royals	12,721	14,845	15,969	16,745	18,048
(Jersey Royals under polythene)	(6,985)	(6,344)	(8,143)	(10,240)	(10,032)
Autumn Earlies	202	228	508	400	217
Other potatoes (incl. maincrop)	843	1,007	933	925	708
Total all potatoes	**13,766**	**16,080**	**17,410**	**18,070**	**18,973**

Area
The area of early Jersey Royal potatoes increased by a further 8% in 2011 to 18,048 vergées. The autumn early and main crop decreased by 46% and 23% respectively.

Production
Exports increased by 412 tonnes, with gross returns decreasing by £0.6M. The gross return per tonne decreased from £1,032 per tonne to £998 per tonne, a fall of 3%.

Chart 3: Area of Jersey Royals covered with polythene



The use of polythene decreased from 61% to 56% of the total area grown.

Table 8: OUTDOOR FRUIT AND VEGETABLE CROPS (Vergées)

	2007	2008	2009	2010	2011
Beans	49	51	96	47	16
Brussels Sprouts	64	74	76	96	51
Cabbage	106	98	150	226	287
Calabrese					
Spring Planted	158	179	48	169	138
Autumn Planted	86	88	43	59	29
Carrots	139	186	161	146	139
Cauliflowers					
Summer	47	71	NR	NR	NR
Autumn (maturing before 31.12)	85	117	82[1*]	161	121
Winter (maturing after 31.12)	130	114	163	180	93
Courgettes					
Spring Planted	185	207	388[2*]	349	276
Autumn Planted	208	267	NR	NR	NR
Leeks	73	86	139	227	257
Lettuce	173	163	187	129	106
Onions	127	55	37	35	22
Parsley	61	41	43	17	25
Soft and cane fruit (other)	75	70	42	39	42
Spring Greens	1	56	NR	NR	NR
Strawberries	50	39	38	39	32
Tomatoes	7	9	1	7	8
Top Fruit	90	111	152	161	176
Other	656	603	525	480	451
Total Outdoor Fruit/Vegetables	**2,570**	**2,685**	**2,371**	**2,567**	**2,269**
Total Outdoor Fruit/Vegetables (including potatoes)	**16,336**	**18,765**	**19,781**	**20,637**	**21,241**
Of which crops grown to a recognised organic standard	584	1041	854	768	465

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

Vegetables

Beans
Beans declined from 47 vergées to 16 vergées a decrease of 66%.

Cabbage
The area increased by 27% to 287 vergées.

Carrots
There was a 5% fall in area from 146 vergées to 139 vergées.

Cauliflowers
Summer and autumn cauliflowers decreased from 161 vergées to 121 vergées a fall of 25%. The winter crop decreased in area by 48% to 93 vergées.

Courgettes
Courgettes decreased by 21% from 349 vergées to 276 vergées.

Leeks
Leeks increased in area from 227 vergées to 257 vergées an increase of 13%.

Lettuce
The lettuce area declined from 129 vergées to 106 vergées a decrease of 18%.

Onions
The onion area fell a further 37% to 22 vergées.

Parsley
The parsley area increased by 47% to 25 vergées.

Fruit Crops

Strawberries
Strawberries decreased by 18% from 39 to 32 vergées.

Other soft and cane fruit
Other soft and cane fruit increased from 39 to 42 vergées, up 8%.

Top fruit
The top fruit area still continues to increase and now stands at 176 vergées up 9%.

Summary
The total area of outdoor fruit and vegetables saw a 3% increase in area from 20,637 vergées to 21,241 vergées. Jersey Royal potatoes increased by 1,303 vergées, maincrop and other potatoes fell by 400 vergées (a 30% fall) and other fruit and vegetables fell by 29 vergées. So, again the majority of the change was due to the amount of potatoes grown. The area of fruit and vegetables in organic production showed a considerable fall of 39% from 768 to 465 vergées.

Table 9: OUTDOOR FLOWER CROPS (Vergées)

Narcissi	2007	2008	2009	2010	2011
First Year	396	352	324	349*[1]	327
Second Year	168	323	342	355	323
Over 2 Years	268	120	155	79	70
Total	**832**	**795**	**821**	**783**	**720**
Anemones	8	14	NR	NR	NR
Pinks	8	6	NR	NR	NR
Spray Carnations	NR	2	NR	NR	NR
Other	100	65	74	61	60
Total Outdoor Flowers	**948**	**882**	**895**	**844*[2]**	**780**

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

Flower Crops

Narcissus
First year plantings down 6% at 327vg, the second year crop area was down 32 vg and 2 year plus crops down 9 vg. The total area under production was down 8% at 720 vg.

Other
The remaining crops were static at 60 vg and accounted for 8% of the outdoor flower area.

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Protected Crops

Table 10: GLASSHOUSE AREAS (m^2)

	2007	2008	2009	2010	2011
	m^2	m^2	m^2	m^2	m^2
Glasshouses under 5 years	16,484	1,300	1,300	1,300	7,034
Glasshouses 5 - 10 years	54,749	56,127	20,925	16,135	16,994
Glasshouses 10-15 years	35,342	47,214	73,011	41,222	49,411
Glasshouses over 15 years	261,275	240,246	235,413	247,931	224,039
Total area of glasshouses	**367,850**	**344,887**	**330,649**	**306,588**	**297,478**
Of which:					
Area heated	233,559	163,351	97,939	120,049	101,595
Area not cropped in last 12 months	47,534	57,303	79,746	82,629	44,107
% not cropped of production area	12.9	16.6	24.1	27.0	14.8

Glasshouse Areas

The total glasshouse area fell a further 3% to 297,478 m^2, though interestingly enough there were 5,734 m^2 of new glass built in 2011, the first for a number of years. The area of heated glass fell by 15% and the glass not cropped decreased by 38,522 m^2, a decrease of 47%, leaving the area of glass out of production at 15% of the total area the lowest level since 2008.

Table 11: GLASSHOUSE CROPPING (m^2)

	2007	2008	2009	2010	2011
Glasshouse	m^2	m^2	m^2	m^2	m^2
Tomatoes: Planted before 1st February	116,676	104,174	24,136	19,528	19,528
Planted after 1st February	5,179	6,683	10,758	8,500	28,620
Total tomatoes	**121,855**	**110,857**	**34,894**	**28,028**	**48,148**
Beans	7,167	4,524	7,340	4,538	5,122
Cucumber	7,523	8,725	10,726	8,750	9,257
Lettuce	1,780	NR	NR	NR	NR
Peppers	18,107	37,137	6,890	11,584	11,299
Potatoes: Planted before 1st November	43,650	13,005	17,471	102,166	104,845
Planted after 1st November	26,844	21,090	25,845	11,475	8,624
Strawberries	11,911	11,145	17,652	16,891	16,698
Others	19,323	20,531	23,550	13,501	12,052
Total fruit and vegetables	**136,305**	**116,157**	**109,474**	**168,905**	**167,897**
Sub-Total (Fruit, vegetables & tomatoes)	**258,160**	**227,014**	**144,368**	**196,933**	**216,045**
Ornamentals					
Bedding Plants	114,171	82,942	94,242	95,094	117,029
Carnations - Standard	7,728	2,680	NR	NR	NR
Carnations - Sprays	7,260	3,260	NR	NR	NR
Chrysanthemums	300	NR	NR	NR	NR
Iris	1,250	173	NR	NR	NR
Lilies	2,883	150	NR	NR	NR
Pot Plants	4,428	5,057	5,607	11,794	3,946
Others	16,288	22,963	11,290	13,036	5,064
Sub-Total (Ornamentals)	**154,308**	**117,225**	**111,139**	**119,924**	**126,039**
Total (Glasshouse production)*	**412,468**	**344,239**	**255,507**	**316,857**	**342,084**

* Includes double cropping

Glasshouse Cropping

Tomatoes
The area of tomatoes planted before the 1st of February remained the same at 19,528 m^2 however the area planted after the 1st of February increased by 237% to 28,620 m^2, giving an increase in tomato production of 72%.

Potatoes
Potatoes planted before the 1st of November increased by 3% but the later planted crop fell by a further 25%.

Strawberries
The strawberry area fell by 1%.

Beans
Beans increased by 13% to 5,122 m^2.

Sweet Peppers
The area grown, decreased by 2% to 11,299 m^2.

Ornamentals
Other ornamentals decreased by 71% to 5,064 m^2.

The overall ornamental production increased from 119,924 m^2 to 126,039 m^2.

Table 12: POLYTHENE TUNNEL AREAS (m^2)

	2007	2008	2009	2010	2011
	m^2	m^2	m^2	m^2	m^2
Area of Multi Span	119,110	115,416	101,599	106,853	107,039
Area of Single Span	101,981	89,703	84,504	85,029	86,121
Total area of polythene tunnels	**221,091**	**205,119**	**186,103**	**191,882**	**193,160**
Of which:					
Area heated	48,984	52,956	48,108	46,853	53,631
Area not cropped in last 12 months	16,514	8,262	16,243	11,523	13,670
% of production area not cropped	7	4	9	6	7

Polythene Tunnel Areas

The total area of polythene tunnels increased slightly, by 1%, to 193,160m^2. The area of multi-span tunnels increased by 186 m^2 and the area of single spans rose by 1,092 m^2. The non-cropped area rose from 11,523 m^2 to 13,670 m^2.

Table 13: POLYTHENE TUNNEL CROPPING (m^2)

	2007	2008	2009	2010	2011
	m^2	m^2	m^2	m^2	m^2
Vegetables and fruit					
Beans	14,260	13,639	14,268	7,860	7,392
Celery	1,099	600	100	3,998	405
Courgette	1,296	1,551	1,496	1,409	40
Cucumber	1,118	820	840	1,832	790
Lettuce	7,679	4,276	4,721	2,647	646
Melons	4,595	NR	NR	NR	NR
Sweet Peppers	8,829	7,019	6,771	5,405	7,092
Potatoes	146,728	143,758	120,276	143,515	146,226
Strawberries	1,711	3,800	200	220	1,520
Tomatoes	8,950	7,054	2,914	4,272	3,240
Others	29,886	26,966	24,839	27,542	32,503
Sub-Total (Fruit and Vegetables)	**226,151**	**209,483**	**176,425**	**198,700**	**199,854**
Ornamentals					
Anemones	NR	NR	NR	401	40
Bedding Plants	16,197	15,391	14,938	13,019	17,349
Carnation - Standards	363	NR	NR	NR	NR
Carnation - Sprays	726	726	NR	NR	NR
Freesias	600	2,200	1,180	380	540
Gypsophila	2,100	NR	NR	360	500
Iris	NR	10	NR	360	540
Lilies	6,093	11,986	7,690	19,473	25,522
Narcissi	3,275	NR	NR	4,295	6,233
Nursery Stock	9,391	6,893	7,085	6,382	7,451
Pot Plants	2,026	5,470	5,470	5,540	4,252
Roses	1,170	1,170	NR	NR	NR
Others	11,580	18,856	6,710	6,219	1,492
Sub-Total (Ornamentals)	**53,521**	**62,702**	**43,073**	**56,429**	**63,919**
Total (Polythene tunnel production)	**279,672**	**272,185**	**219,498**	**255,129**	**263,773**

Polythene Tunnel Cropping

Potatoes: Potato production increased, by 2% to 146,226 m^2.

Tomatoes: Tomato area decreased 24% from 4,272 m^2 to 3,240 m^2.

Beans: Bean area decreased by 6% from 7,860 m^2 to 7,392 m^2.

Sweet Peppers: Sweet peppers were up from 5,405 m^2 to 7,092 m^2 an increase of 31%.

Ornamentals: Ornamental production increased by 13% to 63,919 $m^{2.}$

Total production: The overall production increased by 3%.

Protected Organic Sector

6,301 m^2 of organic crops were grown under protection of which 1,240 m^2 were Jersey Royal potatoes. This represents a fall in protected organic production of 23%.

Livestock

Cattle (including the dairy industry) (Table 14)
In 2010 the Agricultural Statistics showed the cattle population in Jersey at 5,204 (a 2.2% rise on the previous year) with total cows and heifers in the milking herd at 2970 this was virtually unaltered from the previous year. In 2011 total cattle numbers have decreased to 5,139 animals (a fall of 1%) with cows and heifers in milk having also fallen to 2,890 a reduction of 80 animals (a fall of 3%).

Heifers being reared as replacements for the dairy herd over the age of 12 months have again increased from 1,007 in 2010 to 1,114 in 2011 a rise of 10.6%. Heifer replacements under 12 months of age however have fallen by 10.3% year on year from 906 animals in 2010 to 813 in 2011. The increase in dairy herd replacements during 2009 and 2010 would seem to have been prompted by the import of international Jersey bull semen in 2008 and the implementation of the Dairy Industry Recovery Plan. The expectation of increased live cattle exports due to the new genetics has however not been as great as expected and the sale of export products from the new dairy has also been difficult due to trading conditions. It would therefore seem these factors have resulted in less dairy replacements being retained in the islands dairy herds in 2011.

Milk production on dairy farms supplying Jersey Dairy has fallen for the first time in 3 years to an annual intake of 12,712,000 litres for the milk year ending 31st March 2012 a fall of 185,000 litres or 1% compared to the milk year ending 31st March 2011. In 2011/12 there were 26 dairy farms supplying milk to Jersey Dairy a fall of one on the previous year. In addition there is one independent organic dairy farmer processing milk direct for sale to the public through their own farm shop.

Herd numbers and size (Table 15)
The average size of registered dairy herds has increased slightly from 106 in 2010 to 107 in 2011 the average milk yield per cow has risen again year on year from 4,342 litres in 2010 to 4,399 litres per cow in 2011 a rise of 1% year on year. The rise in individual milk output per cow over the last 2 years is thought to be attributed to the improvement gain from imported genetics and the increasing feeding efficiency implemented by managers of the islands dairy farms. The largest recorded milking herd in Jersey holds approximately 285 milking animals.

There are 16 commercial dairy herds holding less than 100 cows in Jersey which in total contain 724 cows or 25% of the Island herd (average herd size 45 cows). There are 11 herds holding over 100 cows containing 2,166 cows or 75% of the Island herd (average herd size 197 cows). The above figures illustrate how the industry is polarised between the smaller one man units and the larger commercial dairy herds.

The gross sales value of the milk delivered to Jersey Dairy increased from £11,142,000 (86.4ppl) to £11,627,000 (91.46ppl) as at the 31st March, a rise in total value of 4% and in sales value per litre of 6%. This increase in the value of gross sales illustrates the effort Jersey Dairy is putting in to develop a value added export market with growth in both milk intake from dairy farmers and in returns from the market place.

The price paid to conventional producers by Jersey Dairy has risen year on year from 44.2 in 20010/11 to 44.5ppl in 20011/12. The above increase in producer prices by Jersey Dairy was paid in recognition of increases in the price paid by dairy farms for concentrates feeds, fertilisers and land rental charges and in an effort to boost farm profitability.

Other Livestock (Table 16)
Beef
The import of Aberdeen Angus bull semen in 2008 to inseminate the native Jersey cow has stimulated growth in the production of beef animals for the local market. The Aberdeen Angus genetics has produced cross bred animals which have a better feed conversion, carcase quality and meat yield thus reducing the costs of production and increasing sales value when compared to a pure bred Jersey cattle. The first cross bred animals were slaughtered in 2010 at 18 months old with the meat being well received by the local meat trade and customers who support local production.

The economics of local beef production using the Aberdeen Angus sires would now seem to favour future growth in this sector and this is demonstrated by the growth of the number of beef animals registered in the 2011 agricultural statistics. There are 95 beef animals on Jersey farms over the age of 12 months and 135 beef animals under 12 months of age which is good news regarding the increased use of the EU approved Jersey abattoir.

Poultry
Egg production from laying hens is the largest poultry sector in Jersey however the number of laying hens had decreased for five years in a row down from 19,120 in 2005 to 15,254 in 2009 a drop of 20.2%. In 2010 this steady decline in egg production reversed with an increase in the number of laying hens, year on year, to 18,376 in 2010 a rise of 20%. In 2011 the number of laying hens again increased to 18,882 hens an increase of 3%.

Meat production from broiler chickens made a dramatic rise from 1,550 birds in 2007 to 5,501 birds in 2008 but has fallen back sharply to only 30 birds in 2011. It has been estimated that over 500,000 broiler chickens are sold in Jersey retail outlets on an annual basis however the economics of small scale local production has proved costly making it difficult for the local producer to make a reasonable return from the market place. Meat birds produced from ducks, geese and turkeys have also fallen in 2011 to 967 down from a high of 1,792 in 2008 (44%) for the same economic reasons as the downturn in broiler production.

Goats
The number of goats in Jersey is very small however there has been a continuing decline from the 23 animals in 2008 to 11 in 2011. The market for goat milk and milk products sold in Jersey however would seem to be growing and it is understood a considerable amount of goat meat is also imported into Jersey.

Pigs
This was a growing sector in the rural economy up to 2007 however the amount of pigs held on farms has declined steadily from 832 held in that year to 427 in 2011 down 48.7%. The local market for pig meat is quite large but again the cost of imported food and current land rental market put local production at a disadvantage compared with the imported product. The decline in pig numbers seems set to continue as the number of sows kept for breeding has declined again to 65 animals from a high of 114 in 2007 down 43%.

Sheep
There is increasing interest from the local meat trade for local, quality lamb and this is reflected in the increase in total sheep numbers over the last few years up from 551 in 2007 to 972 in 2011, up 76% over the period. Continued growth in sheep numbers in Jersey may however be curtailed by the high cost of imported feed and the reduced availability of affordable land as higher rental values are being driven by the demand for land for other enterprises.

Equines (kept on farms) (Table 17)
Horses that are owned by farmers, and kept on farms, have decreased from 503 in 2010 to 478 in 2011. In 2010 there were 350 horses at livery on farms in Jersey this number has fallen to 343 in 2011. The total number of equines, owned or kept at livery on farms in Jersey therefore has fallen slightly by 4% down from 853 in 2010 to 821 in 2011. The number of donkeys owned by farmers has dropped to a low of 25 animals; donkeys at livery and mules on farms have not been recorded in Jersey since 2008.

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

Table 14: CATTLE (Numbers)

	2007	2008	2009	2010	2011
Total cows and heifers in milk	**3,571**	**3,050**	**2,979**	**2,970**	**2,890**
Heifers over 24 months	281	197	247	244	278
Heifers 12 to 24 months	805	719	686	763	836
Heifers under 12 months	746	797	906	906	813
Bulls over 24 months	49	24	30	25	22
Bulls under 24 months	25	33	44	54	38
Beef animals over 12 months	237	144	78	43	95
Beef animals under 12 months	124	77	43	136	135
Other	61	51	80	63	32
Total	**5,899**	**5,092**	**5,093**	**5,204**	**5,139**
Milk sold to Jersey Milk (Litres)	13,347,688	11,799,000	12,561,000	12,897,000	12,712,000
Gross value of milk & milk product sales (£)	10,175,000	10,528,000	10,656,000	11,142,000*	11,627,000

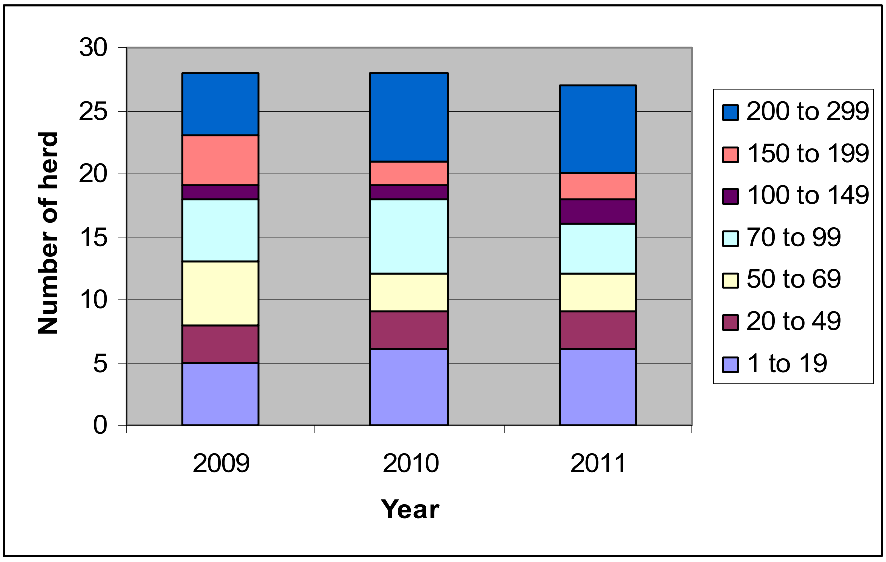
*amended 2012

Table 15: HERD NUMBERS AND SIZE

Classification of Herd (cows and heifers in milk)	**2006**		**2007***		**2008***		**2009***		**2010**		**2011**	
	Herds	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**
1-19	21	120	6	78	7	68	5	48	6	60	6	65
20-49	2	55	4	147	5	192	3	101	3	116	3	114
50-69	6	362	2	129	2	124	5	296	3	189	3	188
70-99	7	592	9	756	5	390	5	445	6	533	4	357
100-149	4	484	1	140	2	233	1	129	1	132	2	242
150-199	4	714	4	743	3	545	4	734	2	335	2	356
200-299	3	706	5	1247	6	1498	5	1226	7	1605	7	1568
300+	1	330	1	331	NR	NR	NR	NR	NR	NR	NR	NR
Total milking animals												
Herds and animals	48	3363	32	3571	30	3050	28	2979	28	2970	27	2890
Average number cows and heifers per herd	70		112		102		106		106		107	

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

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



*Registered producers only from 2007

Table 16: OTHER LIVESTOCK

	2007	2008	2009	2010	2011
Pigs					
Sows for Breeding	114	67	90	80	65
Boars in Service	13	14	10	10	7
Other Pigs	705	534	523	344	355
Total Pigs	**832**	**615**	**623**	**434**	**427**
Poultry					
Fowls from 1 day old to the point of laying	421	778	2,674	1,454	1,875
No. of laying hens	17,649	16,752	15,254	18,376	18,882
Broilers (for killing up to 10 weeks of age)	1,550	5,501	460	243	30
Other Chickens	594	918	1,107	1,001	517
Other Table Fowl (ducks, geese, turkeys)	1,768	1,792	1,061	958	967
Total Poultry	**21,982**	**25,741**	**20,556**	**22,032**	**22,271**
Sheep	**551**	**703**	**861**	**949**	**972**
Goats	**15**	**23**	**20**	**15**	**11**
Other livestock	**6**	**245**	**816**	**66**	**37**

Table 17: EQUINE ANIMALS

Equine					
Horses at Livery	185	315	334	350	343
Horses Owned	376	428	438	503	478
Donkeys at livery	6	NR	NR	NR	NR
Donkeys Owned	29	31	29	26	25
Mules	1	NR	NR	NR	NR
Total Equines	**597**	**774**	**801**	**879**	**846**

Table 18: GRASS AREAS (vg)

	2007	2008	2009	2010	2011
Grass (at 1st October)					
Total area of grassland	18,595	14,539	16,241	16,918	18,895
Of which grown to a recognised organic standard	822	1,147	1,210	1,242	915
Of which grown as part of organic conversion process	697	191	0	0	0
Area cut for hay					
1st Cut	1,745	1,126	1,212	962	851
2nd Cut	469	201	162	183	235
3rd Cut	15	64	0	30	95
Area cut for silage					
1st Cut	2,679	2,448	2,068	4,150	3,234
2nd Cut	1,319	1,364	1,379	1,723	2,104
3rd Cut	210	359	313	571	746
Haylage					
1st Cut	303	318	662	523	655
2nd Cut	209	295	213	145	231
3rd Cut	193	150	46	50	100
Forage Maize	1,465	1,865	2,187	2,173	2,328
Other Stock Feed Crops	280	195	91	193	282
Other Crops for Green Cover	16	NR	NR	NR	NR
Green Manure/Cover Crops	3,588*	5,377	4,504	5,045	4,855

* Amended figure

Table 19: CEREAL AREAS (vg)

	2007	2008	2009	2010	2011
Barley (harvested for grain)	946*	743	741	786	670
Oats (harvested for grain)	28	44	11	13	61
Wheat (harvested for grain)	108	323	299	184	321
Cereals grown for straw only	266	356	506	720	581
Rye	18	NR	NR	NR	NR
Total cereals	**1,366***	**1,466**	**1,557**	**1,703**	**1,633**

* Amended figure