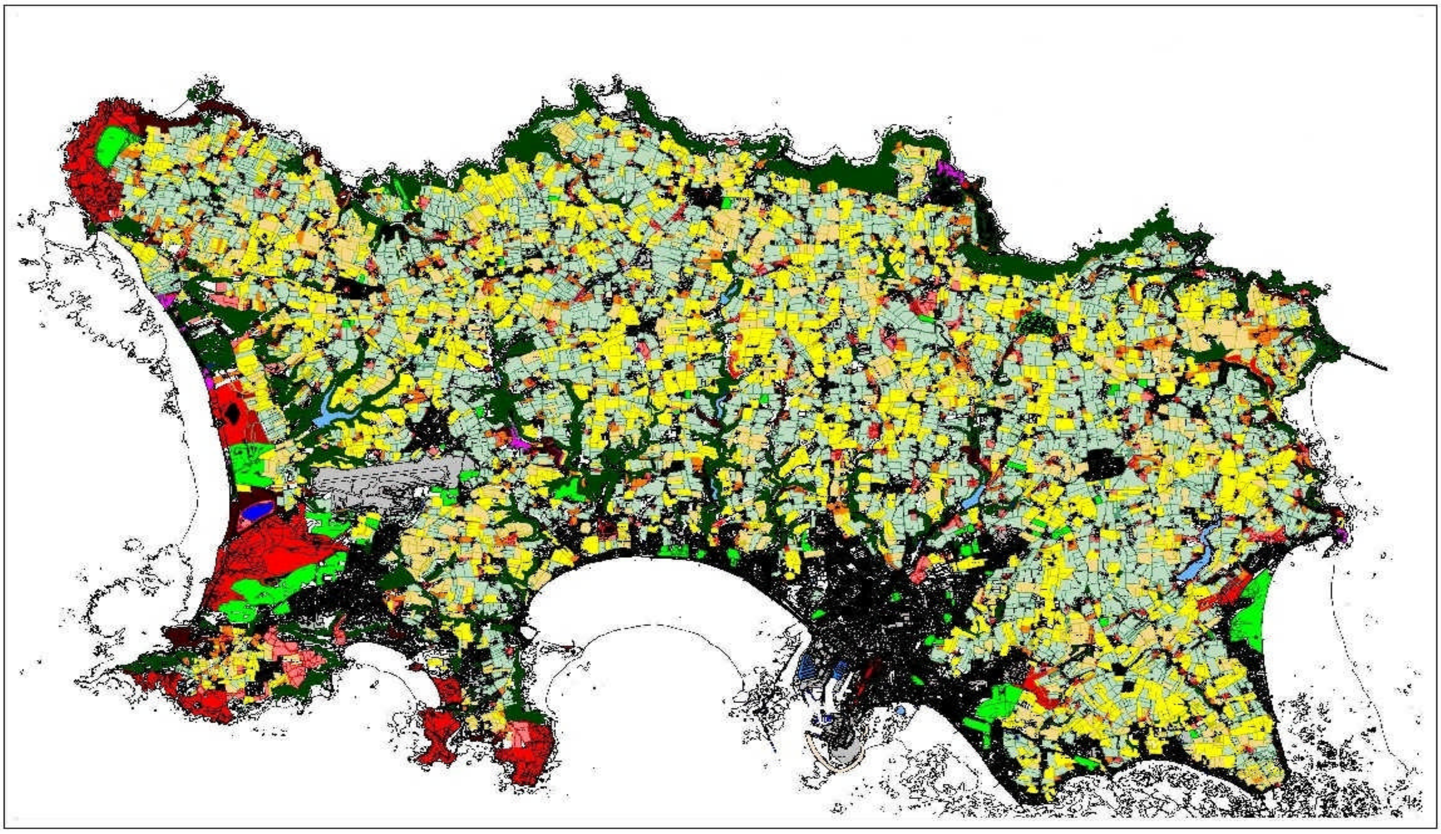
Rural Economy



Agricultural Statistics 2012

Economic Development

States of Jersey

ECONOMIC DEVELOPMENT
AGRICULTURAL STATISTICS FOR 2012

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AGRICULTURAL STATISTICS FOR 2012

Foreword

2012 has seen some positive developments in Jersey's agricultural sector, with an increase in the value of milk sold to Jersey Dairy and a continued demand for land to plant cider apple orchards for locally produced cider and spirits.

A major change to agricultural statistics for 2012 is the inclusion of mail order and plug plant production exports from Jersey. Exports within this sector were £23.4M giving a good indication of the contribution this sector makes to the rural economy.

Contrary to the previous year where we saw a relatively buoyant picture in the arable sector, the total area of outdoor fruit and vegetables saw a 2% decrease in area from 21,241 vergées to 20,766 vergées. The area of Jersey Royal potatoes remained more or less static (down 56 vg) though maincrop and other potatoes fell by 247 vergées (a 27% fall) and other fruit and vegetables fell by 173 vergées. However there were a couple of crops which increased in production area, cabbages up 110 vg and top fruit up 16vg.

The area of fruit and vegetables in organic production continued top decline albeit at a slower rate, falling from 465 vergées to 447 vergées, a fall of 4%.

In 2012 the area used to cultivate Jersey Royal potatoes contracted by 56 vg from 18,048 to 17,992 vergées, a decrease of 0.3%, though the continued run of poor seasons and the impact on returns may see a contraction in the area grown for potato production.

The gross sales value of the milk delivered to Jersey Dairy increased from £11,627,000 (91.46ppl) to £11,919,000 (94.49ppl). This represents a fall in total milk sales of 1% though an increase in sales value per litre of 3%. Jersey Dairy is continuing to develop a value added export market and this effort has improved financial returns from the market place.

The growing demand for cider and apple brandy is still driving the demand for planting cider orchards and the area of land used for top fruit now stands at 192 vergées.

The weather in 2012 made it a difficult growing year, with the early plantings of potatoes badly affected by frost, and very wet weather during harvest. It is felt that the poor weather affected yields and sales with exports down at to 28,600 tonnes (value £28.6M) from 30,890 tonnes (value £30.8M) the previous year.

Jersey Royal new potatoes still remain Jersey's major fresh produce export, but are closely followed by the mail order and plug plant sector with £23.4M.

In a difficult growing year agriculture continues to play its part within the rural economy, helping to safeguard Jersey's countryside, character and environment.

Deputy Carolyn Labey
Assistant Minister Rural Economy

AGRICULTURAL STATISTICS FOR 2012

This document summarises selected information collected from the agricultural returns completed in October 2012 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 2012 data.

Table 1: AGRICULTURAL STRUCTURE (revised table)

Area of Jersey = 64,612 vergées	2008	2009	2010	2011	2012
Land areas					
Owned and farmed	9,117	9,107	9,306	9,072	9,034
Rented	26,567	28,029	27,100	27,797	27,970
Of which:					
Rented or leased from directors/farm	3,102	NR[1*]	NR	NR	NR
Other rented land	23,465	NR	NR	NR	NR
Total	**35,684**	**37,136**	**36,406**	**36,869**	**37,004**
Land Percentage					
Area of agricultural land (% of Island area)	55.2	57.5	56.3	57.1	57.3
Land Owned (% of agricultural land)	25.5	24.5	25.6	24.6	24.4
Land Rented (% of agricultural land)	74.5	75.5	74.4	75.4	75.6
Number of holdings [2*]					
1 - 10 vergées	332	307	286	270	268
Above 10 < 25 vergées	127	134	125	120	121
Above 25 < 50 vergées	62	59	62	65	56
Above 50 < 75 vergées	25	25	27	24	22
Above 75 < 100 vergées	8	8	5	7	7
Above 100 < 250 vergées	24	24	26	24	28
Above 250 < 500 vergées	18	15	16	17	13
Above 500 < 1000 vergées	8	11	6	7	9
Above 1000 vergées	3	3	5	5	5
Total	**607**	**586**	**558**	**539**	**529**

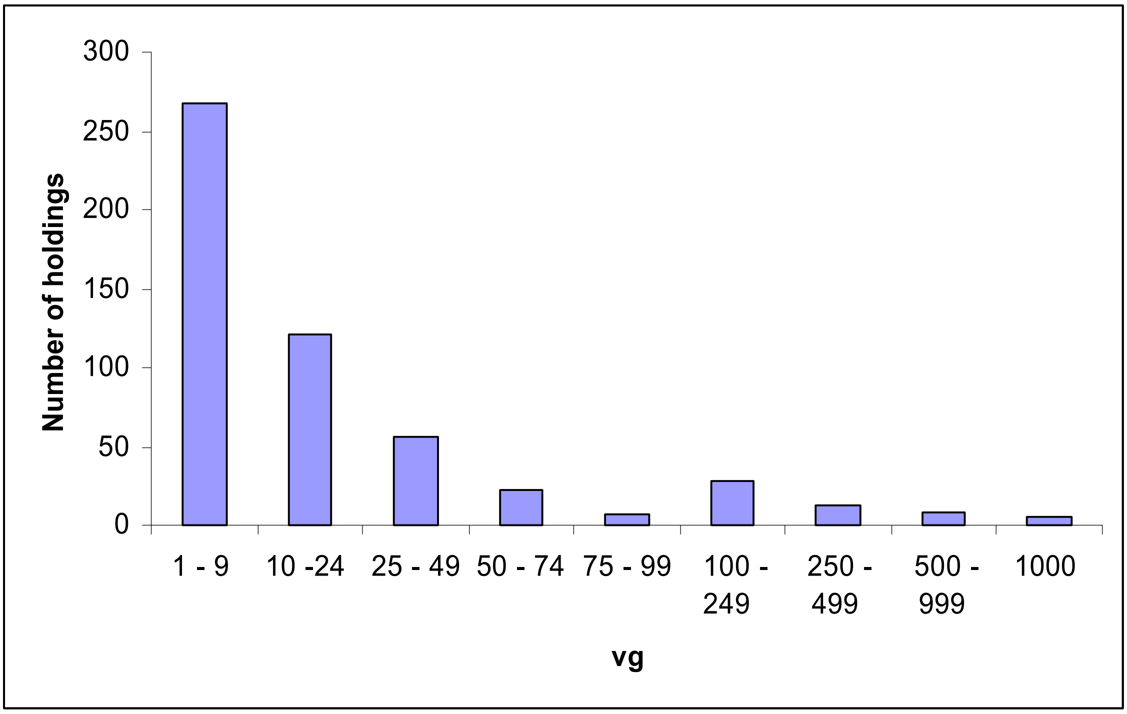
[1*] **Not recorded**

[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	2008	2009	2010	2011	2012
Average size of holding (vergées)	59	63	65	68	70
Area irrigated (vergées)	313	1,615	1,782	2,302	1,613
Uncultivated land (vergées)	2,317	2,064	2,002	1,832	1,734
Uncultivated land as a % of agricultural land	6.5	5.6	5.5	5.0	4.7

Chart 1: Number of Holdings* 2012 – Distribution by size



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

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

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

Table 3: NUMBER OF HOLDINGS CLAIMING SAP and QMP

Holding size	**Total Holdings**	**Businesses claiming SAP & QMP**
1 - 10 vergées	268	0
Above 10 < 25 vergées	121	8
Above 25 < 50 vergées	56	14
Above 50 < 75 vergées	22	7
Above 75 < 100 vergées	7	6
Above 100 < 250 vergées	28	25
Above 250 < 500 vergées	13	13
Above 500 < 1000 vergées	9	6
Above 1000 vergées	5	5
Total	**529**	**84**
Total agricultural area (vg)	**37,004**	
Area on which SAP & QMP claimed (vg)		**27,326**
Area subject to SAP & QMP		**73.8 %**

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

Single Area Payment

The number of businesses claiming SAP and QMP fell from 90 in 2011 to 84 in 2012. However the area of land on which payment fell by 16 vergées, 0.4%, to 27,326 vergées, 74% of the eligible agricultural land.

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 is paid to the person who is responsible for the agricultural management of the land and in most cases this will be the legal tenant. The SAP may exclude certain Countryside 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 2012.

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	2008	2009	2010	2011	2012
Whole Time	737	684	714	669	635
Part Time	161	191	210	205	188
Seasonal or Casual Workers	920	910	863	1073	837
TOTAL	**1,818**	**1,785**	**1,787**	**1,947**	**1,660**

* 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: Vegetable and Flower Exports (% value)

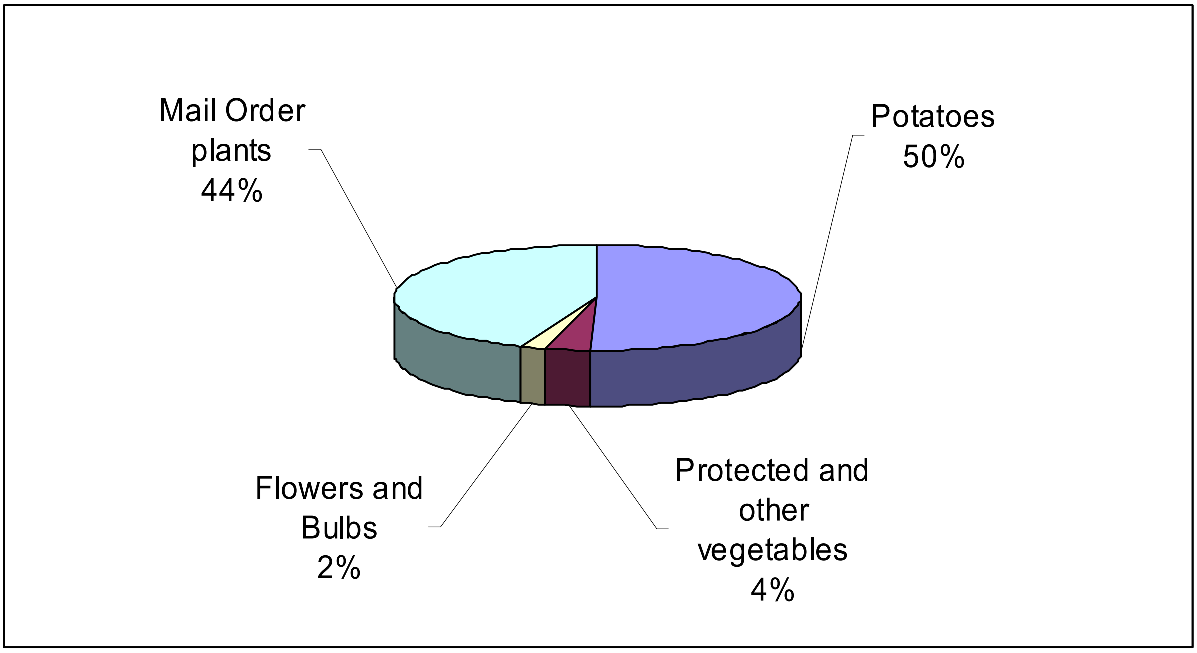


Table 5: VEGETABLE EXPORTS

	2008		2009		2010		2011		2012	
	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)
Beans	77	151,464	74	125,017	44	58,324	26	33,823	5	8,410
Cauliflower	58	88,691	68	108,982	55	96,491	58	97,974	22	38,878
Courgettes	715	678,249	1,001	789,511	591	584,106	524	423,902	569	489,308
Potatoes	28,706	24,476,056	37,631	27,141,633	30,478	31,449,761	30,890	30,837,079	28,588	27,008,402
Sweet Pepper	199	310,000	NA*2	NA	NA*2	NA	NA*2	NA	NA*2	NA
Tomatoes	2,273	3,400,000	NA*2	NA	NA*2	NA	NA*2	NA	NA*2	NA
Protected Cropping	NA	NA	349	256,093	238	199,556	264	206,923	192	174,815
Others	641	293,484	408	400,354	780	781,644	1,074	1,154,219	905	1,162,108
Total vegetables	**32,669**	**29,397,944**	**39,531**	**28,821,590**	**32,186**	**33,169,882**	**32,836**	**32,753,920**	**30,282**	**28,881,922**

*1 Not recorded

*2 Not available, included in protected cropping exports

Table 6: FLOWER EXPORTS

	2008		2009		2010		2011		2012	
Flowers	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**	**Packs**	**Value (£)**
Alstroemeria	513	12,502	NR	NR	NR	NR	NR	NR	NR	NR
Anemones	NR	NR	NR	NR	111	2,692	246	3,720	4	16
Lilies	5,061	134,571	2,781	78,218	5,701	160,733	12,479	277,106	1,762	44,168
Narcissus Flowers	56,169	584,773	48,727	685,975	52,593	875,955	56,730	722,311	44,542	632,072
Pinks	567	10,401	469	8,410	283	5,785	NR	NR	NR	NR
Others	70	1,742	236	8,423	NR	NR	110	5,218	NR	NR
Sub total flowers	**62,380**	**743,989**	**52,213**	**781,026**	**58,688**	**1,045,165**	**69,565**	**1,008,355**	**46,308**	**676,255**

Narcissus Bulbs (t)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)	Tonnes	Value (£)
Sub total bulbs	722	500,000	803	402,537	753	340,719	617	399,101	470	328,163
Mail Order (Plug Plants etc)*	NR	NR	NR	NR	NR	NR	NR	NR	NR	23,414,013
Total flowers and bulbs		**1,243,989**		**1,183,563**		**1,385,884**		**1,407,456**		**24,418,431***
Total value of all crops		**30,641,933**		**30,005,153**		**34,555,766**		**34,161,376**		**53,300,353***

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

Outdoor Crops

Potatoes

Table 7: POTATO AREAS

Vergées	2008	2009	2010	2011	2012
Potatoes					
Jersey Royals	14,845	15,969	16,745	18,048	17,992
(Jersey Royals under polythene)	(6,344)	(8,143)	(10,240)	(10,032)	(9,880)
Autumn Earlies	228	508	400	217	51
Other potatoes (incl. maincrop)	1,007	933	925	708	627
Total all potatoes	**16,080**	**17,410**	**18,070**	**18,973**	**18,670**

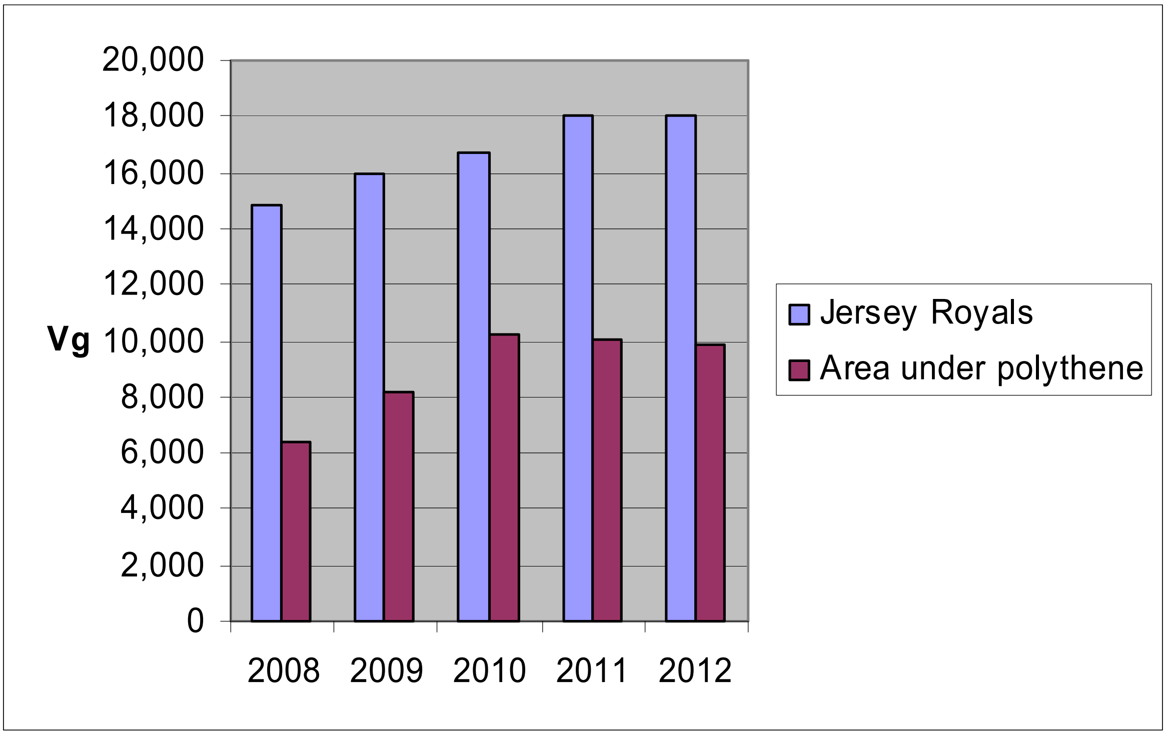
Area

The area of early Jersey Royal potatoes decreased by 0.3 % in 2012 to 17,992 vergées. The autumn early and main crop decreased by 76% and 11% respectively.

Production

Exports decreased by 2,302 tonnes, with gross returns decreasing by £3.8M. The gross return per tonne decreased from £998 per tonne to £945 per tonne, a fall of 5%.

Chart 3: Area of Jersey Royals covered with polythene



The use of polythene decreased from 56% to 55% of the total area grown.

Table 8: OUTDOOR FRUIT AND VEGETABLE CROPS (Vergées)

	2008	2009	2010	2011	2012
Beans	51	96	47	16	14
Brussels Sprouts	74	76	96	51	44
Cabbage	98	150	226	287	397
Calabrese					
Spring Planted	179	48	169	138	103
Autumn Planted	88	43	59	29	39
Carrots	186	161	146	139	110
Cauliflowers					
Summer	71	NR	NR	NR	NR
Autumn (maturing before 31.12)	117	82[1*]	161	121	62
Winter (maturing after 31.12)	114	163	180	93	93
Courgettes					
Spring Planted	207	388[2*]	349	276	256
Autumn Planted	267	NR	NR	NR	NR
Leeks	86	139	227	257	188
Lettuce	163	187	129	106	80
Onions	55	37	35	22	25
Parsley	41	43	17	25	26
Soft and cane fruit (other)	70	42	39	42	48
Spring Greens	56	NR	NR	NR	NR
Strawberries	39	38	39	32	34
Tomatoes	9	1	7	8	0.3
Top Fruit	111	152	161	176	192
Other	603	525	480	451	386
Total Outdoor Fruit/Vegetables	**2,685**	**2,371**	**2,567**	**2,269**	**2,096**
Total Outdoor Fruit/Vegetables (including potatoes)	**18,765**	**19,781**	**20,637**	**21,241**	**20,766**
Of which crops grown to a recognised organic standard	1041	854	768	465	447

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

Vegetables

Beans
Beans declined from 16 vergées to 14 vergées a decrease of 13%.

Cabbage
The area increased by 38% to 397 vergées.

Carrots
There was a further 21% fall in area from 139 vergées to 110 vergées.

Cauliflowers
Summer and autumn cauliflowers decreased from 121 vergées to 62 vergées a fall of 49%. The winter crop remained static at 93 vergées.

Courgettes
Courgettes decreased by 7% from 276 vergées to 256 vergées.

Leeks
Leeks decreased in area from 257 vergées to 188 vergées a decrease of 27%.

Lettuce
The lettuce area further declined from 106 vergées to 80 vergées a decrease of 25%.

Onions
The onion area rose by 14% to 25 vergées.

Parsley
The parsley area increased 4% to 26 vergées.

Fruit Crops

Strawberries
Strawberries increased by 6% from 32 to 34 vergées.

Other soft and cane fruit
Other soft and cane fruit increased from 42 to 48 vergées, up 14%.

Top fruit
The top fruit area still continues to increase and now stands at 192 vergées up 9%.

Summary

Contrary to the previous year, the total area of outdoor fruit and vegetables saw a 2% decrease in area from 21,241 vergées to 20,766 vergées. Jersey Royal potatoes decreased by 56 vergées, maincrop and other potatoes fell by 247 vergées (a 27% fall) and other fruit and vegetables fell by 173 vergées. So, unlike the previous year, the change was mainly due to the change in fruit and vegetable production. The area of fruit and vegetables in organic production continued top decline albeit at a slower rate, falling from 465 vergées to 447 vergées, a fall of 4%.

Table 9: OUTDOOR FLOWER CROPS (Vergées)

Narcissi	**2008**	**2009**	**2010**	**2011**	**2012**
First Year	352	324	349*[1]	327	545
Second Year	323	342	355	323	315
Over 2 Years	120	155	79	70	90
Total	**795**	**821**	**783**	**720**	**950**
Anemones	14	NR	NR	NR	NR
Pinks	6	NR	NR	NR	NR
Spray Carnations	2	NR	NR	NR	NR
Other	65	74	61	60	55
Total Outdoor Flowers	**882**	**895**	**844*[2]**	**780**	**1,005**

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

Flower Crops

Narcissus
First year plantings up 67% at 545 vg, the second year crop area was down 8 vg and 2 year plus crops up 20 vg. The total area under production was up 32% at 950 vg.

Other
The remaining crops were down at 55 vg and accounted for 5% of the outdoor flower area.

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Protected Crops

Table 10: GLASSHOUSE AREAS (m^2)

	2008	2009	2010	2011	2012
	m^2	m^2	m^2	m^2	m^2
Glasshouses under 5 years	1,300	1,300	1,300	7,034	7,022
Glasshouses 5 - 10 years	56,127	20,925	16,135	16,994	14,510
Glasshouses 10-15 years	47,214	73,011	41,222	49,411	51,869
Glasshouses over 15 years	240,246	235,413	247,931	224,039	217,655
Total area of glasshouses	**344,887**	**330,649**	**306,588**	**297,478**	**291,506**
Of which:					
Area heated	163,351	97,939	120,049	101,595	90,515
Area not cropped in last 12 months	57,303	79,746	82,629	44,107	41,875
% not cropped of production area	16.6	24.1	27.0	14.8	14.4

Glasshouse Areas

The total glasshouse area fell a further 2% to 291,506 m^2. The area of heated glass fell by 11% and the glass not cropped decreased by 5%, leaving the area of glass out of production at 14% of the total area the lowest level since 2008.

Table 11: GLASSHOUSE CROPPING (m^2)

	2008	2009	2010	2011	2012
Glasshouse	m^2	m^2	m^2	m^2	m^2
Tomatoes: Planted before 1st February	104,174	24,136	19,528	19,528	18,929
Planted after 1st February	6,683	10,758	8,500	28,620	9,566
Total tomatoes	**110,857**	**34,894**	**28,028**	**48,148**	**28,495**
Beans	4,524	7,340	4,538	5,122	1,865
Cucumber	8,725	10,726	8,750	9,257	9,049
Peppers	37,137	6,890	11,584	11,299	12,361
Potatoes: Planted before 1st November	13,005	17,471	102,166	104,845	87,382
Planted after 1st November	21,090	25,845	11,475	8,624	15,505
Strawberries	11,145	17,652	16,891	16,698	12,051
Others	20,531	23,550	13,501	12,052	35,719
Total fruit and vegetables	**116,157**	**109,474**	**168,905**	**167,897**	**173,932**
Sub-Total (Fruit, vegetables & tomatoes)	**227,014**	**144,368**	**196,933**	**216,045**	**202,427**
Ornamentals					
Bedding Plants	82,942	94,242	95,094	117,029	97,844
Carnations - Standard	2,680	NR	NR	NR	NR
Carnations - Sprays	3,260	NR	NR	NR	NR
Iris	173	NR	NR	NR	NR
Lilies	150	NR	NR	NR	NR
Pot Plants	5,057	5,607	11,794	3,946	856
Others	22,963	11,290	13,036	5,064	6,645
Sub-Total (Ornamentals)	**117,225**	**111,139**	**119,924**	**126,039**	**105,345**
Total (Glasshouse production)*	**344,239**	**255,507**	**316,857**	**342,084**	**307,772**

* Includes double cropping

Glasshouse Cropping

Tomatoes
The area of tomatoes planted before the 1st of February decreased from 19,528 m^2 to 18,929 a fall of 3% and the area planted after the 1st of February decreased by 167% to 9,566 m^2, giving an overall fall in tomato production of 41%.

Potatoes
Potatoes planted before the 1st of November decreased by 17% but the later planted crop increased by 80% to 15,505 m^2.

Strawberries
The strawberry area fell by 28%.

Beans
Beans decreased by 74% to 1,865 m^2.

Sweet Peppers
The area grown, increased by 9% to 12,361m^2.

Ornamentals
Other ornamentals increased by 31% to 6,645 m^2.

The overall ornamental production decreased from 126,039 m^2 to 105,345 m^2.

Table 12: POLYTHENE TUNNEL AREAS (m^2)

	2008	2009	2010	2011	2012
	m^2	m^2	m^2	m^2	m^2
Area of Multi Span	115,416	101,599	106,853	107,039	109,088
Area of Single Span	89,703	84,504	85,029	86,121	64,686
Total area of polythene tunnels	**205,119**	**186,103**	**191,882**	**193,160**	**173,781**
Of which:					
Area heated	52,956	48,108	46,853	53,631	33,859
Area not cropped in last 12 months	8,262	16,243	11,523	13,670	19,484
% of production area not cropped	4	9	6	7	11

Polythene Tunnel Areas

The total area of polythene tunnels decreased, by 10%, to 173,781 m^2. The area of multi-span tunnels increased by 2,049 m^2 and the area of single spans fell by 21,435 m, a fall of 25%. The non-cropped area rose from 13,670 m^2 to 19,484 m^2.

Table 13: POLYTHENE TUNNEL CROPPING (m^2)

	2008	2009	2010	2011	2012
	m^2	m^2	m^2	m^2	m^2
Vegetables and fruit					
Beans	13,639	14,268	7,860	7,392	3,468
Celery	600	100	3,998	405	332
Courgette	1,551	1,496	1,409	40	210
Cucumber	820	840	1,832	790	990
Lettuce	4,276	4,721	2,647	646	1,980
Sweet Peppers	7,019	6,771	5,405	7,092	19,801
Potatoes	143,758	120,276	143,515	146,226	120,061
Strawberries	3,800	200	220	1,520	4,771
Tomatoes	7,054	2,914	4,272	3,240	2,576
Others	26,966	24,839	27,542	32,503	38,277
Sub-Total (Fruit and Vegetables)	**209,483**	**176,425**	**198,700**	**199,854**	**192,466**
Ornamentals					
Anemones	NR	NR	401	40	40
Bedding Plants	15,391	14,938	13,019	17,349	11,046
Carnation - Sprays	726	NR	NR	NR	NR
Freesias	2,200	1,180	380	540	352
Gypsophila	NR	NR	360	500	NR
Iris	10	NR	360	540	NR
Lilies	11,986	7,690	19,473	25,522	2,712
Narcissi	NR	NR	4,295	6,233	6,545
Nursery Stock	6,893	7,085	6,382	7,451	8,301
Pot Plants	5,470	5,470	5,540	4,252	920
Roses	1,170	NR	NR	NR	NR
Others	18,856	6,710	6,219	1,492	1,426
Sub-Total (Ornamentals)	**62,702**	**43,073**	**56,429**	**63,919**	**31,342**
Total (Polythene tunnel production)	**272,185**	**219,498**	**255,129**	**263,773**	**223,808**

Polythene Tunnel Cropping

Potatoes: Potato production decreased, by 18% to 120,061 m^2.

Tomatoes: Tomato area decreased 20% from 3,240 m^2 to 2,576 m^2.

Beans: Bean area decreased by 53% from 7,392 m^2 to 3,468 m^2.

Sweet Peppers: Sweet peppers were up from 7,092 m^2 to 19,801 m^2 an increase of 179%.

Ornamentals: Ornamental production fell by 51% to 31,342 $m^{2.}$

Total production: The overall production fell by 15%.

Protected Organic Sector

12,713 m^2 of organic crops were grown under protection of which 6,968 m^2 were Jersey Royal potatoes. This represents a rise in protected organic production of 102%.

Livestock

Cattle (including the dairy industry) (Table 14)
In 2012 total cattle numbers in Jersey increased by 13 to 5,152 animals (a rise of 0.25%). Cows and heifers in the milking herd have also risen from 2,890 in 2011 to 2,931 in 2012 (up 41 animals) a rise year on year of 1.4%.

Milk production on dairy farms supplying Jersey Dairy has fallen for the 2nd year in succession to an annual intake of 12,613,000 litres during the milk year ending 31st March 2013 a fall of 99,000 litres or 0.8% compared to the milk year ending 31st March 2012. In 2012 there were 24 dairy farms supplying milk to Jersey Dairy a fall of two 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.

Heifers being reared as replacements for the dairy herd over the age of 12 months have decreased by approximately 10% from 1,114 in 2011 to 1,004 in 2012 a decline of approximately 10% reversing the growth in numbers in 2011. Heifer replacements under 12 months of age have declined for a 2nd year falling from 813 in 2011 to 796 in 2012 a fall of 12% since 2010. The decline in the rearing of dairy herd replacements in 2011 and 2012 would seem to have been prompted by the difficulties experienced in building a sustainable export market for live cattle, since the import of international Jersey bull semen in 2008, due to transport costs and ferry scheduling to France.

Herd numbers and size (Table 15)
The average size of registered dairy herds has increased slightly from 107 in 2011 to 117 in 2012 the average milk yield per cow has however fallen back year on year from 4,399 litres per cow in 2011 to 4,303 litres per cow in 2012 a fall of 2.2%. The fall in individual milk output per cow over the course of 2012 can attributed to the extreme wet weather, poor grazing conditions and lower forage quality over the winter period.

There are 13 commercial dairy herds holding less than 100 cows in Jersey which in total contain 631 cows or 21.5% of the Island herd (average herd size 48.5 cows). There are 12 herds holding over 100 cows containing 2,300 cows or 78.5% of the Island herd (average herd size 191.7 cows). The above figures illustrate how the industry is polarised between the smaller one man units and the larger commercial dairy herds. The largest recorded milking herd in Jersey holds approximately 280 milking animals.

The gross sales value of the milk delivered to Jersey Dairy increased from £11,627,000 (91.46 ppl) in March 2012 to £11,919,000 (94.5 ppl) a rise in total value of 2.5% and in sales value per litre of 3.3%. This increase in the value of gross sales illustrates the effort Jersey Dairy is putting in to developing a value added export market with product now being exported to Spain, India, Japan and potentially other countries in the near future. Growth in exports should lead to increased milk production from the islands dairy herds improving future farm income and profitability.

The price paid to conventional producers by Jersey Dairy has risen year on year from 44.5 in 20011/12 to 44.7ppl in 20012/13. The above increase in producer prices by Jersey Dairy was paid in recognition of low profitability due to increases in the price paid by dairy farms for concentrates feeds, fertilisers and land rental charges and the extreme weather which reduced milk output on many farms.

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 24 months old with the meat being well received by the local meat trade and customers who support local production.

The economics of local beef production using the Aberdeen Angus sires would 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 2012 agricultural statistics. There are 139 beef animals on Jersey farms over the age of 12 months and 170 beef animals under 12 months of age, a rise of 46% and 26% respectively since 2011. These animals will increase supplies of local beef to consumers and increase the use and efficiency 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 18376 a rise of 20.5%. In 2011 the number of laying hens again increased to 18,882 hens an annual increase of 2.75%. In 2012 the number of laying hens rose steeply to 25,418 (up 34.6%) due to a shortage of imported eggs, following the EU amending its regulations concerning the size of battery hen cages, the market for which has now been filled by local free range eggs.

Meat production from broiler chickens rose to 5501 birds in 2008 but has fallen back sharply to only 5 birds in 2012. 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 2012 to 823 down from a high of 1,792 in 2008 (down 45.9%) for the same economic reasons as 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. In 2012 however this decline halted with an increase to 20 animals mainly due to one owner expanding his herd with a desire to start milk production. The market for goat milk and milk products sold in Jersey seems to be growing and it is understood a considerable amount of goat meat is also imported into Jersey and therefore we could see more goats in Jersey in future.

Pigs

This was a growing sector in the rural economy up to 2007 however the amount of pigs held on farms had 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 to the imported product. The number of pigs kept in Jersey in 2012 has however risen to 452 animals in 2012 with the number of sows kept for breeding also having risen from 65 in animals in 2011 to 73 sows in 2012 up 12.3%. This rise in local pig production is encouraging and hopefully numbers will continue to rise in future.

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 703 in 2008 to 1,074 in 2012 a growth of 52.8% over this 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 growth in potato production.

Equines (kept on farms) (Table 17)

Horses that are owned by farmers, and kept on farms, have decreased from 503 in 2010 to 457 in 2012 a fall of 9.1%. In 2010 there were 350 horses at livery on farms in Jersey this number has fallen to 315 in 2012 down 10%. The total number of equines, owned or kept at livery on farms in Jersey therefore has fallen by 9.5% in the last 2 years down from 853 in 2010 to 772 in 2012.

Donkeys owned by farmers have dropped to a low of 24 animals in 2012. Donkeys at livery and mules on farms have not been recorded in Jersey between 2008 or 2012.

Other

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)

	2008	2009	2010	2011	2012
Total cows and heifers in milk	**3,050**	**2,979**	**2,970**	**2,890**	**2,931**
Heifers over 24 months	197	247	244	278	235
Heifers 12 to 24 months	719	686	763	836	769
Heifers under 12 months	797	906	906	813	796
Bulls over 24 months	24	30	25	22	26
Bulls under 24 months	33	44	54	38	36
Beef animals over 12 months	144	78	43	95	139
Beef animals under 12 months	77	43	136	135	170
Other	51	80	63	32	50
Total	**5,092**	**5,093**	**5,204**	**5,139**	**5,152**
Milk sold to Jersey Milk (Litres)	11,799,000	12,561,000	12,897,000	12,712,000	12,613,000
Gross value of milk & milk product sales (£)	10,528,000	10,656,000	11,142,000*	11,627,000	11,919,000

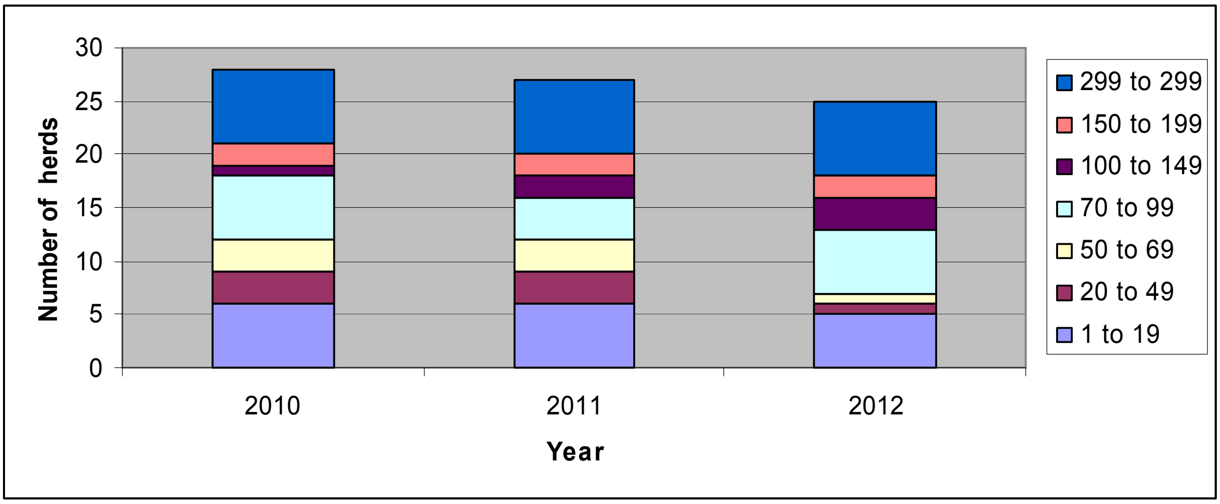
*amended in 2012

Table 15: HERD NUMBERS AND SIZE

Classification of Herd (cows and heifers in milk)	**2007***		**2008***		**2009***		**2010**		**2011**		**2012**	
	Herds	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**	**Herds**	**Cows**
1-19	6	78	7	68	5	48	6	60	6	65	5	48
20-49	4	147	5	192	3	101	3	116	3	114	1	48
50-69	2	129	2	124	5	296	3	189	3	188	1	53
70-99	9	756	5	390	5	445	6	533	4	357	6	482
100-149	1	140	2	233	1	129	1	132	2	242	3	348
150-199	4	743	3	545	4	734	2	335	2	356	2	362
200-299	5	1247	6	1498	5	1226	7	1605	7	1568	7	1590
300+	1	331	NR	NR	NR	NR	NR	NR	NR	NR	NR	NR
Total milking animals												
Herds and animals	32	3571	30	3050	28	2979	28	2970	27	2890	25	2931
Average number cows and heifers per herd	112		102		106		106		107		117	

*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

	2008	2009	2010	2011	2012
Pigs					
Sows for Breeding	67	90	80	65	73
Boars in Service	14	10	10	7	7
Other Pigs	534	523	344	355	372
Total Pigs	**615**	**623**	**434**	**427**	**452**
Poultry					
Fowls from 1 day old to the point of laying	778	2,674	1,454	1,875	496
No. of laying hens	16,752	15,254	18,376	18,882	25,418
Broilers (for killing up to 10 weeks of age)	5,501	460	243	30	5
Other Chickens	918	1,107	1,001	517	570
Other Table Fowl (ducks, geese, turkeys)	1,792	1,061	958	967	823
Total Poultry	**25,741**	**20,556**	**22,032**	**22,271**	**27,312**
Sheep	**703**	**861**	**949**	**972**	**1,074**
Goats	**23**	**20**	**15**	**11**	**20**
Other livestock	**245**	**816**	**66**	**37**	**2**

Table 17: EQUINE ANIMALS

	2008	2009	2010	2011	2012
Equine					
Horses at Livery	315	334	350	343	315
Horses Owned	428	438	503	478	457
Donkeys at livery	NR	NR	NR	NR	NR
Donkeys Owned	31	29	26	25	24
Mules	NR	NR	NR	NR	NR
Total Equines	**774**	**801**	**879**	**846**	**796**

Table 18: GRASS AREAS (vg)

	2008	2009	2010	2011	2012
Grass (at 1st October)					
Total area of grassland	14,539	16,241	16,918	18,895	19,004
Of which grown to a recognised organic standard	1,147	1,210	1,242	915	997
Of which grown as part of organic conversion process	191	0	0	0	0
Area cut for hay					
1st Cut	1,126	1,212	962	851	1,178
2nd Cut	201	162	183	235	221
3rd Cut	64	0	30	95	40
Area cut for silage					
1st Cut	2,448	2,068	4,150	3,234	3,275
2nd Cut	1,364	1,379	1,723	2,104	1,836
3rd Cut	359	313	571	746	588
Haylage					
1st Cut	318	662	523	655	647
2nd Cut	295	213	145	231	63
3rd Cut	150	46	50	100	66
Forage Maize	1,865	2,187	2,173	2,328	1,891
Other Stock Feed Crops	195	91	193	282	316
Green Manure/Cover Crops	5,377	4,504	5,045	4,855	5,483

* Amended figure

Table 19: CEREAL AREAS (vg)

	2008	2009	2010	2011	2012
Barley (harvested for grain)	743	741	786	670	1,021
Oats (harvested for grain)	44	11	13	61	12
Wheat (harvested for grain)	323	299	184	321	260
Cereals grown for straw only	356	506	720	581	477
Total cereals	**1,466**	**1,557**	**1,703**	**1,633**	**1,770**

* Amended figure