

Rural Economy Strategy 2011-2015



Sustaining and Growing The Rural Economy

Economic Development
Planning and Environment

States 
of Jersey

Economic Development Department
Jubilee Wharf
24 Esplanade
St. Helier, JE1 1BB

Planning and Environment Department
Environment Division,
Howard Davis Farm,
Trinity, JE3 5JP

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Email : environmenquiries@gov.je

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Foreword

Foreword

An effective Rural Economy Strategy (RES) for Jersey must deliver a number of things. Firstly, the RES needs to enhance the economic, social and environmental value of the countryside, where rural economic activity is undertaken. It must also take into account the needs and requirements of those who use and work the land: rural policy must continue to take full account of society's expectations. As such, sustainable development in the countryside requires rural businesses and Government to consider a 'triple bottom line' - profit, people and environment.

The first RES 2006-2010, focused on the need to address a decline in the rural sector, particularly in agriculture and on the need to re-define Government's relationship with rural businesses. Five years on, the fortunes of the rural economy look very different.

Clear optimism exists in the agricultural industry, demonstrated by high levels of private investment in both the arable and dairy sectors. This is on the back of consistent year on year, real term growth in Gross Value Added (GVA) within the agricultural sector since 2006. Indeed, in the recently published GVA figures for 2009, agriculture was one of the few sectors demonstrating growth in a contracting economy. This is a great achievement, which should be applauded and is a testament to the resilience and determination of the industry.

Local and export markets will continue to be challenging places to do business for 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. The new RES will focus on providing measures to consolidate economic growth, maintain key infrastructure, reduce and remove barriers to greater productivity, protect the agricultural land bank, promote collaboration in the food chain, defend the Jersey brand, encourage market focussed, high value food production and reduce market distorting mechanisms.

Our traditional industries are part of the Island's make-up. It is important not just to view the value of agriculture to Jersey in purely economic terms. Many public goods and services can be delivered by agriculture, beyond food production; the protection and stewardship of natural resources, the provision of renewable energy, greater food security, public access to the countryside beyond that provided on the coast and the maintenance of a landscape, which to a large degree makes the Island recognisable as Jersey. Our economic strategy should 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.

In response to this, businesses in the rural sector are showing great maturity, recognising that the highest environmental standards and levels of best practice not only increase the professionalism of the sector, but ultimately provide a Unique

Selling Point that has, in tandem with high welfare standards and disease free status, the potential to differentiate Jersey products in increasingly competitive markets.

Government's role is of course to protect the environment, but this role should not rely solely on regulation or be unnecessarily prescriptive or bureaucratic. The RES will provide a collaborative framework which allows farmers to take greater responsibility and ownership of their environmental obligations and aspirations, through targeted environmental planning. It will also provide support for the enhancement of the countryside, in areas where the market fails to deliver biodiversity improvements or better access and encourage the public to make a deeper connection with the countryside, wildlife and Jersey's land-based industries.

The consultation process revealed widespread support for the contents of the strategy. The process has been rigorous and at times challenging, but the real lesson is that working together in the spirit of genuine partnership and collaboration can solve common problems and deliver a common sense of purpose. This is no better illustrated than by the successful collaboration between the Economic Development Department, the Planning and Environment Department and the Economic Affairs Scrutiny Panel RES Sub-Group, chaired by Deputy Carolyn Labey, the subsequent scrutiny report having been presented to the States in October 2010.

The RES 2011-2015 is a broad ranging document. It sets a framework for decision making and outlines areas for review as well as specific policies. Ultimately, some of these may need to go back to the States and other stakeholders in due course, but we are confident that the new RES is progressive, sets the right direction of travel and strikes a good balance between the needs of the rural sector, Government and the people of Jersey.

Connétable Len Norman

Assistant Minister for Economic Development

Deputy Rob Duhamel

Assistant Minister for Planning and Environment

January 2011

Introduction

Introduction

What is the Rural Economy Strategy?

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 depends on also providing positive environmental and social benefits.

The first RES was adopted as States policy in June 2005 and implemented on 1st January 2006 for a five year period ending 31st December 2010. In the [RES 2005](#)⁽¹⁾, a commitment was given to review the RES over the course of 2009, with the view to bringing forward a new strategy for 2011-2015.

The review has helped ensure that the changing needs and requirements of the Island's rural economy are reflected and accommodated in the new RES 2011-2015.

Shaping the countryside

The Island's landscape has been formed by generations of farming. It is a landscape of cultural significance which helps support a richness and variety of wildlife that is not matched, area for area, anywhere in Europe and is rightly something to be proud of.

As such, Jersey's countryside is one of its prime assets. Successive tourism surveys have shown countryside quality to be a principle decision factor in choosing Jersey as a destination. Extensive evidence also exists to show that the appearance and ambiance of a location is a significant factor for locating businesses and attracting the quality of staff they need.

1 Rural Economy Strategy: Growing the Rural Economy, 2005. Economic Development and Planning and Environment Departments, States of Jersey.

Key sector analysis

Key sector analysis

Rural Economy

Rural Economy is defined as the cumulative revenues from business activity derived from the use of agricultural land and the countryside (i.e. businesses which derive their income from land dependent activity).

Dairy

For hundreds of years, the Jersey cow and associated dairy sector have been inextricably linked to the Island. The dairy food chain is still an important element of overall economic activity in Jersey today. The presence of the dairy industry shapes the views and landscape of Jersey as we know it - being part of the 'DNA' of the Island.

In recent times, the dairy industry's profitability has been at an historic low, resulting in a low level of on-farm investment. In 2002, the dairy received £0.8m to restructure following the collapse of the mini pot market, resulting in massive over production. The restructuring involved the removal of 4.5 million litres of milk production and 1,071 cows from the Island herd. Despite this drop in numbers, the Island-wide subsidy for cattle farmers was maintained. This meant an increase in support levels per cow, however, the industry has continued to generate a low level of profitability.

The 2003 McQueen Report⁽²⁾ was commissioned by the States to undertake a strategic review of the industry and was instrumental to the development of the Dairy Industry Recovery Plan entitled the "Road Map to Recovery"⁽³⁾ which identified key work streams whereby both the [Jersey Milk Marketing Board](http://www.jerseydairy.je/home)⁽⁴⁾ and the [Royal Jersey Agricultural and Horticultural Society](http://www.royaljersey.co.uk)⁽⁵⁾ took the lead in delivering particular objectives, e.g. dairy relocation and importation of genetics.

Also adopted in that plan was the concept of an economically sustainable industry being one that achieved an average farm EBITDA (Earnings before Interest, Tax, Depreciation & Amortisation) of 20% of turnover, which at that time became the benchmark target accepted by industry and Government.

2 McQueen, D. 2003. The Dairy Industry in Jersey: a Strategic Review

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

4 <http://www.jerseydairy.je/home>

5 <http://www.royaljersey.co.uk>

In 2007, a further reduction of 500 cows (equivalent to 2 million litres of milk) was undertaken by the industry to bring production in line with market demand. The current viability of the industry still relies on a high level of Government subsidy, the Jersey consumer paying a high price compared to the UK and maintenance of a [law](#)⁽⁶⁾ licensing the importation of liquid milk. Despite low returns, the adoption of the "Road Map to Recovery"⁽⁷⁾ has given a degree of optimism for the future, with solid plans in place for restructuring the industry into an efficient and profitable concern, which will benefit producers and consumers alike.

The relocation of the new, more efficient dairy operation to Howard Davis Farm, the ability to actively seek value added export markets for a range of premium Jersey products and efficiency improvements from imported genetics, brings the possibility of delivering greater returns to farms from the market for milk and milk products. However, it is accepted that building sustainable economic growth takes time and the efficiency improvements from imported genetics will not be fully recognised until 2018.



Figure 1 Freshly calved heifer.

The Jersey Dairy 5 Year Business Plan indicates that by 2011/12 EBITDA could reach 17% (assuming no changes to the current level of Government support during this period). This support includes the Single Area Payment (SAP), Quality Milk Payment (QMP) and dairy services support.

Arable

The local arable industry has been heavily reliant on the Jersey Royal potato for much of living memory. Despite the recent decrease in areas planted, early Jersey plantings in 2009 were up 26% at 15,969 vergées, compared with the low point in 2007.

This increased demand for potato production has resulted in strong competition for land, which has driven up both the sale and rental value per vergée and consequently has stifled some of the diversification which was starting to occur from 2007.

The dependence on a single crop, albeit with a strong brand image, creates problems in other areas, such as continuous cropping. This can lead to a build up of pests and diseases, reduces diversity and more importantly, should there be a crop or market failure, there is no fall back position or alternative crop to minimise the risk and the impact on grower profitability.

6 Customs and Excise (Import and Export Control) (Jersey) Order, 2006

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

This reliance on a single crop is also affected by the EU review of active ingredients, reducing the number of pesticides available especially herbicides. The permitted herbicides have serious consequences for the following crops and have an impact on Jersey's limited rotation whereby Jersey Royal potatoes are grown annually followed by either, vegetables, maize or cereals in the same year.

Small fields, hand planting and being an Island community means that production costs and imported materials are higher than the competition (harbour dues, freight costs, economies of scale etc). Crop production on an Island requires farming to be of a particularly high standard to protect our limited natural resources and to limit the impact caused by fertilisers and pesticides on our water supply.

However, the Jersey Royal potato remains the backbone of the arable industry, with the potato protected from foreign imitation, through the granting of a Protected Designation of Origin (PDO) and Certification Mark in 1996. Both the Jersey Royal (Logo) & Jersey Royal/Jersey Royals (words) were registered as both a certification mark and an ordinary trade mark in 2002.



Figure 2 Planting Jersey Royal potatoes by hand.

Other agricultural activities

Recently, increased competition for land as a result of competition within the private sector has raised issues around land controls, agricultural land and how 'agriculture' is defined.

In Jersey, agricultural land is defined as land being capable of use for agriculture. Of all land, approximately [50%^{\(8\)}](#) falls under the [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#), which conditions and regulates land use, effectively protecting the agricultural land bank. For land that is not subject to the Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974, there is no control on this other than planning laws.

Currently, the main issue surrounding land control is the loss of land to commercial horse liveries and orchards. However, in Jersey, these are recognised in law, as bona fide agricultural activities. The Agricultural Land (Control of Sales and Leases) (Jersey) Law 1974 does protect land in Jersey for agriculture, but it does not protect land for specific sectors of agriculture.

To use the Law to protect specific sectors of the agriculture industry could be seen as Government interference within the market place. However, it is vital that planning and land control remain flexible enough to allow the industry to adapt to the needs of their customers in order to remain competitive.

Vision for the Rural Economy

Vision for the Rural Economy

The work of the Rural Economy Strategy review has been guided by a long-term vision for the rural economy in Jersey. We imagine:

1. A profitable farming and food sector, that values skills development, can compete in international markets and that values its role as a steward of the environment, providing a good standard of living and opportunities where new entrants can build a career.
2. That through cooperation and collaboration, rural businesses have invested beyond the farm gate, receiving a fair return for the food that they produce.
3. Good communication throughout the food chain, where production, processing and marketing are integrated, operating to high environmental standards, focused to meet consumers demands and with a higher proportion of local produce finding its way into the retail food supply chain.
4. Rural businesses will continue to receive payment from the Government, but only for public goods and services that the public wants and needs. With farmers and landowners being rewarded for planning to deliver good land and environmental management and for providing an attractive countryside.
5. Some diversification in the rural economy beyond food production, but that land and expertise remain available if greater quantities of Jersey-produced food are suddenly needed.
6. The States of Jersey's relationship with the rural economy involves moving away from measures that distort markets towards facilitating and enabling business decisions and removing barriers to productivity.
7. The States of Jersey continues to have a role in creating a market for environmental goods and is responsible for food safety, animal welfare and environmental protection - wherever this is possible, as a facilitator not a regulator.

The RES is an operational five year plan. Although it suggests a vision above, it will be important to look beyond this time limited framework and consider a longer term vision, to identify, at an early stage, the challenges beyond 2015. This is necessary in order that the rural sector is in a position to face key challenges and address emergent issues. These issues include: climate change; water, energy and food security and ever increasing global competition.

Policy V 1

Rural conference

An Annual Rural Conference will be established by the Rural Economy section to discuss, debate, draft and update the long term vision for the rural economy of Jersey and to discuss and attempt to resolve ongoing and emerging issues.

Policy V1 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	3,347	3,347	3,347	3,347	3,347

Policy V 1 Budget Breakdown (£)



1 PROFIT

1 PROFIT

Measuring the contribution of the rural economy to Jersey

Performance Indicators

1.1 A simple measure of the contribution the rural sector makes, in terms of Gross Value Added (GVA) to the economy as a whole, does not take into account the specific social and environmental costs and benefits of economic activity in the countryside.

1.2 [‘The State of Jersey - A report on the Condition of Jersey's Environment,’](#)⁽⁹⁾ released in January 2005, set a baseline against which to measure progress on the implementation of a wide range of policies and legislation designed to look after the environment. The report identified twelve social and environmental considerations:

- Climate change
- Air quality
- Globally important biodiversity
- Land use patterns
- Contaminated land
- Freshwater quality and availability
- Marine water quality
- Waste management
- Local biodiversity
- Land management regimes
- Key biological populations
- Quality of life for Islanders

1.3 Activities in the rural economy have the potential to impact on all twelve of these environmental considerations. Each is closely monitored through a system of 40 environment indicators, which were identified on the basis of the pressure and impact of human activity on the environment as agreed in 2005. As well as annual monitoring of these indicators, a complete review of [‘The State of Jersey, 2005,’](#)⁽¹⁰⁾ will be conducted in 2011.

9 The State of Jersey: a Report on the Condition of Jersey's Environment. Environment and Public Services Committee, 2005. States of Jersey

10 The State of Jersey: a Report on the Condition of Jersey's Environment. Environment and Public Services Committee, 2005. States of Jersey



Policy PR 1

Performance indicators

States of Jersey to ensure that environmental indicators are reviewed and developed to reflect the current impacts of the rural economy on the environment as part of the review of '[The State of Jersey, 2005](#)'⁽¹¹⁾ which will be conducted in 2011.

Policy PR 1 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	4,420	4,420	4,420	4,420	4,420

Policy PR 1 Budget Breakdown (£)

Rural Economy - links with Europe and the United Kingdom

1.4 Jersey is neither part of the UK or of the European Union, although it does have a 'relationship' with the EU which is governed by [Protocol 3 to the UK's Act of Accession 1972](#)⁽¹²⁾. This means that although Jersey remains outside the EU and consequently, the [Common Agricultural Policy](#)⁽¹³⁾, the Island is considered as inside in relation to trade in goods. This will most likely have 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

11 The State of Jersey: a Report on the Condition of Jersey's Environment. Environment and Public Services Committee, 2005. States of Jersey

12 http://www.opsi.gov.uk/acts/acts1972/ukpga_19720068_en_1

13 http://europa.eu/legislation_summaries/agriculture/general_framework/index_en.htm

Policy PR 2

Rural Economy - links with Europe and the United Kingdom

Rural Economy officers to be represented at a newly formed, cross-governmental, Jersey-Brussels Group, that will consider:

- Strengthening representation in Brussels
- Improving coordination on EU matters in Jersey
- [Protocol 3](#)⁽¹⁴⁾ compliance
- Future options and opportunities for Jersey and Europe

Policy PR 2 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	1,875	1,875	1,875	1,875	1,875

Policy PR 2 Budget Breakdown (£)

The European and Mediterranean Plant Protection Organisation ([EPPO](#))⁽¹⁵⁾

1.5 The European and Mediterranean Plant Protection Organisation (EPPO) is an intergovernmental 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.

1.6 Founded in 1951, EPPO has grown from 15 original members to 50 member countries, including Jersey and nearly every country in the European and Mediterranean region.

1.7 EPPO serves a valuable source of technical information and training, particularly in recognition, control and eradication of key pests. It also coordinates expert monitoring and early warning systems for potentially devastating controlled organisms.

1.8 An excellent example is the annual Colorado Beetle Campaign, designed to protect Jersey's £25 million potato export industry from the threat of this pest establishing in the Island. The Campaign is a cooperative effort between Jersey, Guernsey, France and the UK.

14 http://www.opsi.gov.uk/acts/acts1972/ukpga_19720068_en_1

15 <http://www.eppo.org/>



1.9 Without EPPO membership, Jersey could be considered a 'Third Country' and as such, would have more stringent export conditions placed on produce bound for the UK or France and would also be exposed to an increased risk of the establishment of Colorado Beetle.

Policy PR 3

Links with the European and Mediterranean Plant Protection Organisation (EPPO)

States of Jersey should remain a member of the European Plant Protection Organisation in order to receive the benefits of membership.

Policy PR 3 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	30,412	30,412	30,412	30,412	30,412

Policy PR 3 Budget Breakdown (£)

Review of support payments and States of Jersey funding

1.10 The [Rural Economy Strategy, 2005](#) contained key areas of support that included:

- The [Single Area Payment](#)⁽¹⁶⁾
- The Quality Milk Payment
- The [Rural Initiative Scheme](#)⁽¹⁷⁾
- The [Countryside Renewal Scheme](#)⁽¹⁸⁾
- [Jersey Enterprise](#) grants⁽¹⁹⁾
- Marketing support for Jersey products⁽²⁰⁾

Single Area Payment (SAP)

1.11 The [Single Area Payment](#) (SAP) underpins farming activity in Jersey and ensures that the unique character of the countryside is maintained, by purchasing public goods and services. It replaced production led subsidies, decoupling

16 www.gov.je/singleareapayment

17 www.gov.je/ruralinitiative

18 www.gov.je/countrysiderenewal

19 <http://enterprise.jersey.com>

20 <http://www.genuinejersey.com>

production from subsidy, to discourage crops being grown for the subsidy they received. In this way, SAP continues to encourage market led diversification into crops and livestock, some of which previously received no subsidy.

1.12 The SAP is comparable with area payments under the Single Payment Scheme (SPS) within the United Kingdom (see Table 1).

YEAR	NUMBER OF APPLICANTS	RATE PAID PER VERGEE (£)	RATE PAID PER HECTARE (£)	TOTAL PAID (£)
2006	101	35	195	963,914
2007	104	36	200	989,893
2008	102	37	206	973,692
2009	96	37	206	1,012,440
2010	95	37	206	994,364

Table 1 Single Area Payment 2006-2010.

1.13 The receipt of the SAP is conditional (i.e. if payment conditions are not met applicants may receive a reduced payment or even lose the SAP entirely) on farmers meeting certain standards and levels of environmental performance (known as cross compliance), including relevant legislation, Codes of Good Agricultural and Environmental Practice (CGAEP), the provision of annual financial returns and the submission of an annual Farm Manure and Waste Management Plan.

1.14 The aim of the SAP therefore is to:

- Purchase, on behalf of the public, a baseline level of environmental protection for soil, water and key habitats
- Underpin a minimum level of agricultural activity, in recognition that the rural landscape is shaped by farming activity
- Encourage farmers to produce products that are required by the market and in so doing so, reduce the need for public support
- Provide an area payment that is similar to that received by EU and UK farmers, so that Jersey farmers are not put at a competitive disadvantage in their export markets



Policy PR 4

Single Area Payment (SAP)

The Single Area Payment will continue in to be available in 2011 to allow Jersey farmers and producers to remain competitive in UK and other markets. A detailed review of EU and UK rural support mechanisms will begin in 2011.

The review will consider:

- The rationale and benefits of a SAP in Jersey and whether the SAP currently provides the best use of funds in terms of supporting the Jersey farmer
- Options for modulation of area payments into broader rural development measures
- Levels of environmental compliance and the development of minimum environmental standards for farms
- Industry and market assurance schemes, to audit levels of environmental performance, to avoid duplication in the Environment Plan
- Whether the perceived need for parity with the EU and UK is justified and achievable

States of Jersey to extend cross compliance measures to include the requirement to produce an Environment Plan. It is accepted that where farms have environmental requirements under independent market and assurance schemes and other marketing agreements, that these requirements will not be duplicated in the Environment Plan.

Policy PR 4 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	1,026,076	1,026,000	930,076	924,871	924,871

Policy PR 4 Budget Breakdown (£)

Organic farming

1.15 Organic farming has an important contribution to make alongside other farming methods, as it seeks to work with natural processes to achieve a sustainable production system with limited use of external inputs. The potential for pollution and other environmental damage is lessened, as organic farming avoids the use of artificial fertilisers and synthetic pesticides. It instead emphasises the role of crop rotation, in helping to maintain soil fertility and to combat pests and disease problems and relies on the use of fertility building crops and natural fertilisers, such as animal manures.

1.16 There is some evidence from the UK that organic farming is good for certain wildlife and may address some of the reasons for declines in some species, although no specific evidence exists for Jersey.

Policy PR 5

Organic farming

States of Jersey to undertake an analysis of the benefits of organic farming in Jersey and to subsequently, review levels of support and mechanisms to encourage greater market focus. In the interim, components in the Countryside Renewal Scheme will be retained and the Rural Initiative Scheme will continue to provide support for market research and business innovation in the organic sector.

Policy PR 5 budget breakdown (£) included in Countryside Renewal Scheme.

Quality Milk Payment (QMP)

1.17 The Quality Milk Payment (QMP) is designed to provide additional temporary financial support to the dairy industry, in response to low levels of profitability. The need for the QMP was also justified in recognition of the importance of iconic grazing animals to the landscape and the historical and social importance of the Jersey cow to the Island. The 2005 McQueen report ⁽²¹⁾, together with the industry's Woodacre Report ⁽²²⁾, prompted the Jersey Milk Marketing Board (JMMB) to formulate and implement the "Road Map to Recovery"⁽²³⁾ (endorsed by the Promar Report ⁽²⁴⁾ and the Corporate Services Scrutiny Panel) which required the following:

- Use the asset value of the Five Oaks Dairy to build a new, efficient dairy and reduce debt
- Bring milk supply in line with market demand

21 McQueen, D. 2005. Review of Jersey legislation relevant to trade in the dairy and livestock sectors and related control issues.

22 Woodacre, B. 2003. Dairy Industry Profitability.

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

24 [Promar International, 2006. A Sustainable Dairy Industry in Jersey. Report prepared for the States of Jersey.](#)



- Improve on farm efficiency and profitability (mainly through the importation of bovine semen)
- Turn milk supplies that exceed the requirements of the liquid milk market into profitable high value export products, such as cream, cheese and skimmed milk

1.18 In recognition that the industry recovery plan would take time to deliver the above benefits, the [Rural Economy Strategy, 2005](#) set the QMP at approximately £195 per cow from 2005 to 2007 and then proposed a slow reduction to £155 per cow by 2010, as the benefits of new genetics and the new dairy became available to the industry. Due to delays in processing the [legislation](#)⁽²⁵⁾ to allow the importation of bovine semen and in building the new dairy at Howard Davis Farm, it has become necessary to maintain the QMP at approximately £180 per cow from 2008 to 2010 because of continued low profitability in the industry (see Table 2).

MILK YEAR ⁽²⁶⁾	AVERAGE EBITDA ⁽²⁷⁾ %	AVERAGE EBITDA £ PER COW	AVERAGE EBITDA £ PER FARM
2004/5	9.6	171	23,738
2005/6	8.6	155	21,429
2006/7	7.9	140	20,417
2007/8	4.1	68	10,748
2008/9	6.2	124	19,891
2009/10	5.9	123	19,557

Table 2 Dairy Industry Costing Scheme (2005-2009).

NB. The industry Woodacre Report set a target EBITDA for dairy farms of 20% per annum as being necessary to allow for capital repayment and future dairy farm reinvestment.

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

27 EBITDA = Earnings Before Interest, Tax, Depreciation & Amortisation

26 Annual Milk Year runs from 1st April to 31st March

1.19 In 2010, all the elements of the 'Road Map to Recovery'⁽²⁸⁾ have been put in place, with the new Dairy Industry 5-year Plan, predicting significant improvements in profitability, with optimism concerning the export trade for livestock and added value milk products to the UK.

1.20 Producers are now being asked to increase milk output for the first time in five years, with a target of a 15% increase in the second half of the current milk year (1st April 2010 to 31st March 2011). The Jersey Milk Marketing Board (JMMB) annual report and financial statement shows an improved set of trading results to 31st March 2010, with an improved operating surplus compared to 2009, a reduced level of debt and a higher milk price being paid to milk producers.

1.21 The top 50% of dairy farms, ranked on margin for investment by Kite Consulting (KC) - the dairy industries consultant of choice - averaged a 3.81 pence per litre (ppl) margin on a cost base of 45.31ppl. Previous reports from KC have highlighted the target of a margin for investment of 3ppl. This is required to give farmers the confidence to invest and build a sustainable supply of Jersey island milk over the long-term. The top 50% of producers are now achieving this level of margin.

1.22 Imported pure Jersey bull semen has been widely used, with the first calves being born in June 2009. These calves will not enter the dairy herds until 2011 and the full effects of semen importation will not be fully apparent until 2018. In short, the dairy industry has turned the corner and is now looking forward to a sustainable and profitable future.

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



Policy PR 6

Quality Milk Payment (QMP)

Quality Milk Payment support levels are set out below for the Rural Economy Strategy 2011 to 2015 on the following basis:

- Maintenance of the current Quality Milk Payment support level (£180 per cow per annum) for a two year period 2011 to 2012
- A reduction in Quality Milk Payment support level of 6.7% in 2013, 2014 and 2015
- A review of the Quality Milk Payment will be undertaken in 2015, in order to assess levels of profitability and the effects of the importation of international bull semen
- Total Quality Milk Payment annual support 2011 to 2015 to be calculated on the number of cows held in each herd in 2008 (see Table 3). This base year will exclude any increased cow numbers that may be required to provide the growth in milk supply for the dairy product export market. As such any increase in herd size will be market driven
- Reductions in Quality Milk Payment, will, where appropriate, be re-directed into rural development activity (e.g. support for Genuine Jersey)
- To safeguard the Jersey cow in her Island home, the receipt of Quality Milk Payment will be limited to those herds which register their milking cows in the pedigree Jersey herd book administered by the [Royal Jersey Agricultural and Horticultural Society](http://www.royaljersey.co.uk)⁽²⁹⁾
- Quality Milk Payment conditionality will be based on compliance with relevant legislation and codes of practice, dairy hygiene inspections, animal welfare requirements, efficient use of animal manures and the production of an Environment Plan
- The dairy industry will be required to provide independent evidence of appropriate cost control mechanisms

Policy PR 6 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	540,545	540,545	513,795	487,045	433,545

Policy PR 6 Budget Breakdown (£)

29 <http://www.royaljersey.co.uk>

YEAR	PER ANNUM REDUCTION % ⁽³⁰⁾	QMP £ VALUE PER COW
2011	0	180
2012	0	180
2013	6.7	168
2014	6.7	156
2015	6.7	144

Table 3 Reduction of Quality Milk Payment from 2011-2015.

Dairy services

1.23 In 2010, the Economic Development Department (EDD) agreed a Service Level Agreement (SLA) with the [Royal Jersey Agricultural and Horticultural Society \(RJA&HS\)](#)⁽³¹⁾ for the provision of an artificial insemination, bull proving and milk recording service to the dairy industry. This contract runs for four years with an annual budget of £233,000 in 2010 rising to approximately £250,000 in 2013.

1.24 The SLA recognises that the above services are a vital part of a modern dairy industry and that dairy farmers' current profitability would be compromised by full cost recovery. In addition, to operate the service, the RJA&HS have been obliged to employ staff on fixed term contracts in order to attract people with appropriate skills.

1.25 In future, demand for these services is set to diminish as businesses acquire the skills to undertake their own breeding and recording needs. It is clear that there will come a time when demand for a central dairy services provision will reduce to a level where the cost of maintaining it will not be justified.

30 Percentage reduction calculated on 2011 Quality Milk Payment

31 <http://www.royaljersey.co.uk>



Policy PR 7

Dairy services

States of Jersey to honour the 2010-2013 Service Level Agreement with the Royal Jersey Agricultural & Horticultural Society for the provision of services to the dairy industry. Future service provision will be reviewed in 2013 with the twin objectives of meeting the States 'User Pays' policy and encouraging the dairy industry to deliver these services on a more self-financing basis.

Policy PR 7 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	245,220	251,220	257,220	209,720	168,220

Policy PR 7 Budget Breakdown (£)

Dairy Industry Costing Scheme (DICS)

1.26 The Dairy Industry Costing Scheme (DICS) is operated under a three year SLA between EDD and the JMJB signed in 2008. The terms of this agreement include a grant of £9,000 per annum to assist the JMJB in employing a qualified farm secretary to collect, input and maintain financial information for farmers supplying milk to Jersey Dairy.

1.27 The above information is held on a computerised recording system and made available confidentially, via a web link, to an EDD officer to enable up-to-date financial information to be compiled for individual farmers, industry representatives and States Departments.

Policy PR 8

Dairy Industry Costing Scheme (DICS)

The Service Level Agreement agreed with the Jersey Milk Marketing Board finishes on the 31st March 2011 and it is proposed that a new Service Level Agreement is agreed for 2012 to 2015, in order to allow both the industry and Government to monitor dairy industry profitability.

Policy PR 8 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	12,687	12,687	12,687	12,687	12,687

Policy PR 8 Budget Breakdown (£)

[Jersey Milk Marketing Board \(JMMB\)](#)⁽³²⁾

1.28 The Jersey Milk Marketing Board (JMMB) was established in 1954. Since that time, much has changed, both in Jersey and off the Island. In the mid 1950s there were some 1,000 dairy holdings, compared to 29 working dairy farms today. On a wider perspective, national marketing boards have been disbanded across the world, as a result of being seen as anti-competitive and favouring the producer rather than the consumer.

1.29 All milk producers in Jersey are currently under an obligation to supply their milk to the JMMB, which is considered to be inconsistent with competition legislation.

32 <http://www.jerseydairy.je/home>



Policy PR 9

Jersey Milk Marketing Board

A statutory reorganisation of the Jersey Milk Marketing Board is intended to address the tension which exists between the legislation under which the Jersey Milk Marketing Board was created in 1954, and the [Competition \(Jersey\) Law 2005](#).

Policy PR 9 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	4,695	4,695	4,695	4,695	4,695

Policy PR 9 Budget Breakdown (£)

Rural Initiative Scheme (RIS)

1.30 The Rural Initiative Scheme (RIS) is designed to promote growth in the rural economy by supporting diversification, enterprise, energy efficiency and innovation. Prior to 2005, there had been a decline in agricultural land use and land rental values and the profitability of the entire agricultural industry was at a low level. Even the potato industry was going through a fundamental restructuring programme, which saw the emergence of one dominant marketing group and many smaller businesses leaving the industry.

1.31 New ventures were envisaged to be essential in reversing the above decline in land use. It was clear then, that agricultural businesses trying to diversify would:

- pose a high investment risk when seeking bank loans
- be carrying a high level of debt owing to poor profitability levels
- lack sufficient equity against which to secure borrowing

1.32 RIS support for new business innovations was/is based on approved business plans which demonstrate that new and existing businesses will:

- Develop new higher value markets and services
- Add value and reduce costs
- Improve productivity
- Enhance employment and improve skills
- Not displace existing Jersey businesses
- Not have an adverse impact on the environment

1.33 The range of ventures in receipt of RIS grants include:

- Costs of researching new business opportunities
- Promotional activities including the [Chelsea Flower Show](#)⁽³³⁾/[Jersey Fish Festival](#)⁽³⁴⁾ etc.
- Marketing and packaging of local products
- Precision equipment for new and existing crops
- Equipment to enable local meats, fruit and vegetables to be used in value added products
- Processing facilities for the local fishing industry
- Processing equipment for small and large scale dairy businesses
- Facilities to reduce the energy and production costs involved in crop drying and storage
- Green energy generation equipment
- Development of the local honey bee industry
- Help with start up costs for other new entrants to the agricultural industry

1.34 The effect of RIS grants on the 65 applicants receiving monies from 2006 to 2010 has been monitored (see Table 4). Of the ten funded research projects three have progressed to an enterprise grant and one to an industry-wide grant, two are still ongoing with the remaining three proving unviable.

YEAR	APPLICATIONS RECEIVED	APPLICATIONS APPROVED	GRANT AWARDED (£)	APPLICANTS CLAIMING	GRANT CLAIMED (£)
2006	55	35	311,364.46	21	273,856.14
2007	32	20	102,309.25	9	83,423.10
2008	23	17	288,943.01	15	245,163.46
2009	31	16	243,770.14	13	228,820.48
2010	16	10	293,103.83	7	162,445.54
TOTAL	157	98 (62.4%)	1,239,490.69	65 (66.3%)	993,708.72

Table 4 Rural Initiative Scheme grants 2006-2010.

33 <http://www.rhs.org.uk/Shows-Events>

34 <http://www.jerseyfishfestival.com/>



1.35 Over the past two years private investments of over £20 million have been made towards potato grading, packing and marketing facilities, a new dairy at Howard Davis Farm and other small business developments. This has transformed the demand for agricultural land with competition increasing rental values to very high levels, leading to concerns over the maintenance and diminishing size of the agricultural land bank.



Figure 3 Leek harvesting: local businesses have benefitted from the Rural Initiative Scheme.

1.36 Today, the rural sector is facing new challenges including:

- Climate change mitigation and adaptation. This requires investment in energy generation (e.g. anaerobic digestion), energy efficiency, fossil fuel reduction, machinery and equipment replacement and greenhouse gas reduction measures
- A growing world population requiring greater yields and reduced food waste
- Organic farming businesses needing to become more market focused and reduce their reliance on States production subsidies
- The cattle, sheep, pig and horse industries need to develop coordinated disease strategies to enhance animal health and welfare including bio-security measures and safe animal handling facilities
- Research and development to combat crop pests and diseases and to meet increased due diligence and traceability requirements
- The need for business and environmental risk management strategies
- Identification of training and skill requirements to meet future business needs, such as cattle breeding and milk recording

1.37 There is a need to support measures that continue to encourage entrepreneurial activity, economic growth, new ideas and allow rural businesses to respond to the current and future environmental and economic challenges.

Policy PR 10

Rural Initiative Scheme (RIS)

The Rural Initiative Scheme (RIS) will be continued. The scope of the RIS will be widened to include climate change adaptation and mitigation, waste management, capital items for food processing, research and development, agri-tourism, vocational training and the implementation of best farming practice approaches. The eligibility criteria for potential applicants will be clarified and publicised. The means testing process will be strengthened and stricter funding allocation processes will be applied by the application review panel, to ensure that the applicant funds the majority of the project costs (Government will fund up to 45%) and that grants awarded are claimed within agreed timescales.

An annual report will be made public, detailing approved RIS initiatives and the support that they receive.

Policy PR 10 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	243,036	167,667	177,813	161,689	161,689

Policy PR 10 Budget Breakdown (£)

Collaborating to develop local markets and address food security

1.38 The world's population is set to grow from 6.7 to 9.2 billion by 2050⁽³⁵⁾, with a predicted need to double food production by that date. This food has to be produced by increases in yields and the reduction in waste as there is a finite area of agricultural land. The UK's Chief Scientific Advisor believes that food security will present significant future challenges. Jersey is potentially vulnerable to supply shocks and higher prices as energy and shipping costs increase and will not be isolated from the effects of predicted global shortages.

35 [United Nations, 2007. World Population prospects: The 2006 Revision, Executive Summary.](#)



1.39 The majority of the Island's produce is exported to mainland UK, with a lower proportion of produce available locally⁽³⁶⁾. Single Area Payment returns indicate that farm produce sold for local consumption was worth £20.3 m (2008), representing some 18% of local Jersey sales.

1.40 The Jersey Household Expenditure Survey (HES)⁽³⁷⁾ demonstrates the potential opportunities that exist in the Jersey market place. For example, expenditure per household on poultry, beef and pork amounts to £2.00, £1.90 and £1.00 per week respectively that equates to an annual spend of £3.7 million on poultry, £3.5 million on beef and £1.9 million on pork, of which very little of this meat is produced in Jersey. Therefore, a high quality abattoir service which meets internationally recognised regulatory requirements for slaughtering livestock for human consumption is vital, if the markets for locally produced meat are to be optimised, but this is also an essential requisite to realise EU export markets.

1.41 Striving for complete self-sufficiency in food in Jersey is unrealistic under existing consumption patterns, in an era in which we import food from around the globe, especially so on an Island where needs will fluctuate over time. However, there is a need to understand levels of demand for local food. There needs to be a stronger alliance between Government and market suppliers, consolidating the supply chain, bringing businesses together from different parts of the food chain in Jersey. This will allow businesses to work more collaboratively, ensuring that they collectively satisfy consumer demands and that every business involved from farm to point of sale has this as their objective. Such a partnership approach would improve relationships, improve transparency, take out cost, build trust and ultimately generate untapped value at that part of the chain where farming and food businesses meet.

Policy PR 11

Collaborating to develop local markets and address food security

A food security strategy, including a long term vision for Jersey will be produced addressing key challenges including climate change, energy and water security, competition for land and current and future demand for food.

The Rural Initiative Scheme will continue to support applications for research and development into innovative and more efficient production techniques and the development of new markets.

Policy PR 11 budget breakdown (£) included in Rural Initiative Scheme.

36 [Comparison of Food Prices in Jersey and the United Kingdom, 2005. Jersey Competition Regulatory Authority](#)

37 [Jersey Household Expenditure Survey, 2004/5. Statistics Unit, States of Jersey.](#)

Policy PR 12

Collaborating to develop local markets and address food security

States of Jersey to conduct a processing infrastructure survey to identify future opportunities and investment requirements to encourage the reduction in usable waste e.g. using meat or vegetables not suitable for export for added value processed products and encouraging the production of a wider range of demand driven food crops.

Policy PR 12 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	5,000	5,000	5,000	4,018	4,018

Policy PR 12 Budget Breakdown (£)

Policy PR 13

Collaborating to develop local markets and address food security

States of Jersey to commit to supporting the provision of a high quality abattoir. The interface between users of the abattoir service and the States of Jersey, as the operator, will continue to be developed through the recently formed Abattoir Users Group.

Policy PR 13 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	452,240	452,240	452,240	452,240	452,240

Policy PR 13 Budget Breakdown (£)



Policy PR 14

Collaborating to develop local markets and address food security

States of Jersey to establish and provide the secretariat for a Jersey Food and Farming Partnership (JF&FP), bringing together the business support services provided by Rural Economy, Jersey Enterprise and Genuine Jersey Products Association / Jersey Export Group, together with those businesses which market, sell and produce food in Jersey.

Policy PR 14 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	5,000	5,000	2,000	2,000	2,000

Policy PR 14 Budget Breakdown (£)

Countryside Renewal Scheme (CRS)

1.42 The aim of the Countryside Renewal Scheme (CRS) is to conserve and enhance the environment and landscape of Jersey. In particular, it is there to support the maintenance and improvement of biodiversity, reduce pollution, promote environmentally sustainable farming and improve access to the countryside. The scheme was launched in the spring of 2005 and offers grants to support voluntary environmental projects.

1.43 The scheme includes a range of specific activities, such as the provision of footpaths, planting hedges, managing grassland and heathland to promote biodiversity, as well as building new slurry stores to help prevent diffuse pollution. Applicants are also able to propose their own ideas, through the 'special project' option.

1.44 Environmental monitoring is fundamental in measuring the success and impact of the scheme. The success of the CRS is assessed as part of the 'State of Jersey' monitoring programme. The most appropriate indicators to monitor land use changes and land management regimes under the CRS have been identified, in order to monitor the status, distribution, abundance and changes over time, of key groups of species, across a variety of habitats Island-wide.



Figure 4 Hedgerow creation under the Countryside Renewal Scheme.

1.45 The Environment Department is committed to reporting back in 2011, to determine environmental trends, so that Jersey can prioritise its actions in order to maintain and improve the quality of Jersey's countryside.

Policy PR 15

Countryside Renewal Scheme (CRS) development

The Countryside Renewal Scheme has now been running for five years and during 2010/11, the scheme will be reviewed in detail, covering all aspects of design, content, delivery and monitoring. In particular, the review will ensure that grants are targeted towards enhancement measures identified by the Environment Plans, States of Jersey strategic plans (e.g. Biodiversity Strategy, Energy Policy) and are consistent with the delivery of international obligations under Jersey's existing suite of Multilateral Environmental Agreements (MEAs).

An annual report will be made public, detailing approved CRS initiatives and the support that they receive.

Policy PR 15 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	2,773	2,773	2,773	2,773	2,773

Policy PR 15 Budget Breakdown (£)



Policy PR 16

Countryside Renewal Scheme (CRS) development

The Countryside Renewal Scheme (CRS) will provide new components for encouraging the development of local businesses to provide independent advice, training and contract services in relation to CRS applications. Some research, auditing and monitoring work could also be undertaken by such businesses, either as a service provided for an applicant or under a States of Jersey contract. There is a clearly identified opportunity for the development of local advisory expertise in this area.

In addition, the CRS will identify specific countryside enhancement projects that could be put out to tender, to create a market for the delivery of environmental goods and services and encourage the development of a local rural knowledge economy.

Policy PR 16 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	471,441	401,441	328,311	328,311	328,311

Policy PR 16 Budget Breakdown (£)

Supporting business growth and development

1.46 The Rural Economy Section and [Jersey Enterprise](#) both provide advice and support for business growth and development. The Rural Initiative Scheme (RIS) targets the rural economy, whilst Jersey Enterprise focuses on providing support to small and medium sized businesses in all sectors, except for the finance industry. Both the RIS and the Jersey Enterprise grants are funded by the Economic Development Department with some level of overlap in objectives and delivery with regard to the rural sector.

Policy PR 17

Supporting business growth and development

States of Jersey to review its business advice and grant provision models, in order to identify how the Rural Economy section and Jersey Enterprise can deliver the most efficient and integrated service to the rural sector, as part of the development of the new five year Enterprise and Business Development Strategy 2011-2015.

Policy PR 17 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	5,580	5,580	5,580	5,580	5,580

Policy PR 17 Budget Breakdown (£)

Marketing Support for Jersey Produce

1.47 Generic marketing support for Jersey produce continues to be provided by the States of Jersey. It is important to ensure that this support is targeted appropriately in order to achieve maximum returns from the market place. The States of Jersey supports marketing of agricultural products in many ways including:

- Protected Designation of Origin (PDO)
- Trade (Certification) marks
- Rural Initiative Scheme
- Support for Jersey Product Promotion Limited (JPPL)
- Representation at key marketing events e.g. the [Real Food Festival](#)



Figure 5 Genuine Jersey logo.

1.48 It is unclear what level of generic marketing support is required by the rural sector in the future and how this can be best coordinated. Further consideration should be given to determine how direct and indirect marketing can be best achieved and the relative roles of Government and industry.

1.49 Jersey Product Promotion Limited (JPPL) is the umbrella organisation for both Genuine Jersey Products Association (GJPA) - [Genuine Jersey](#)⁽³⁸⁾ and the Jersey Export Group (JEG).

38 <http://www.genuinejersey.com/>



1.50 The role of Jersey Product Promotion Limited, including the Genuine Jersey Products Association is valuable in supporting local businesses during their early stages of development and has a valuable role in helping to develop a Jersey Food and Farming Partnership with other key stakeholders within the industry. It is recognised that Genuine Jersey is an excellent brand, with the Genuine Jersey Logo being registered as a trade mark in the UK in June 2008 and in Jersey in October 2010. At present there are increasing pressures on many businesses and support is needed to help develop start up and small businesses within the rural sector. GJPA can continue to provide support in this area.

1.51 The Genuine Jersey concept was launched in response to a States initiative, initially designed to increase the revenue potential of local producers, particularly those in the agricultural/horticultural sector. As constituted, Genuine Jersey derives the bulk of its income from a States grant. To replace the grant would require in excess of a ten fold increase in income from members and sponsors, which is unlikely to be attainable over the life of the RES 2011-2015. However, it should be noted that income from members is projected to double from £8.5k in 2009 to £17k in 2011.

Policy PR 18

Marketing Support for Jersey Produce

Support for Jersey Product Promotion Limited will continue. It is anticipated that future expenditure will need to remain at a similar level to existing funding. However, additional income from members and sponsors will reduce the funding gap and consequently the level of States support, from its current level of £140k to £115k per annum by 2015.

States of Jersey to review the level of generic marketing support currently provided to the rural sector in order to identify future marketing needs and roles and responsibilities to ensure a fully coordinated approach.

Policy PR 18 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	138,346	133,346	128,346	128,346	118,346

Policy PR 18 Budget Breakdown (£)



Figure 6 Jersey Royal logo.

Protecting the Jersey brand

1.52 Due to the Protected Designation of Origin (PDO) and Certification Marks, only Jersey Royal potatoes grown in Jersey can be sold as Jersey Royals within Europe. Nevertheless, there is a risk to the Jersey Royal brand, as illustrated by recent applications to register names such as Cornish, Suffolk and Ayrshire Royals. The States of Jersey and the industry have invested a great deal of time and money to develop the brand image and this investment needs to be protected and where possible, advantage taken of market support from the EU for the promotion of the PDO.

Policy PR 19

Protecting the Jersey Brand

States of Jersey will defend the Jersey Royal potato Protected Designation of Origin and trade mark and seek market opportunities to exploit the benefits that Protected Designation of Origin status brings, through increasing consumer awareness of the importance of regional and speciality foods.

Policy PR 19 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	8,005	8,005	8,005	8,005	8,005

Policy PR 19 Budget Breakdown (£)



Policy PR 20

Protecting the Jersey Brand

States of Jersey to maintain the links with The Protected Food Names Association (PFNA), formed by UK producers (including Jersey) of protected regional food products. The PFNA, which boasts a combined turnover of £1 billion, will be looking at areas such as the marketing of the Protected Food Names (PFN) logos (e.g. PDO) in the UK.

Policy PR 20 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	11,250	3,130	3,130	3,130	3,130

Policy PR 20 Budget Breakdown (£)

Charges for States of Jersey services

1.53 The States of Jersey provides a number of services to a range of customers, including the rural economy, Government departments, the agricultural industry and the general public.

1.54 These services fall into two main categories: statutory services which have to be provided and non-statutory services which are discretionary. These services are currently either charged at full or partial cost recovery, or provided free of charge.

1.55 Under Financial Direction No. 4.1 "Increases in States Fees and Charges" (User pays principle), it is recognised that there are instances where a particular group receives a service from a States Department at a charge which is below cost and are subsequently being subsidised by the taxpayer. Where there is a commercial benefit or private gain these will be charged at full cost recovery (including all direct as well as overhead costs).

1.56 These services can be broadly categorised into three groups:

- Environmental/Island/public benefit
- Statutory
- Commercial/private gain

Policy PR 21

Charges for States of Jersey services - Environmental/Island/public benefit

Non-statutory pest monitoring and reporting, advisory, diagnostic and education services are to remain free of charge as they provide a source of environmental intelligence to the Environment Department and the information gathered is in the Island/public interest.

Policy PR 21 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	92,675	92,675	92,675	92,675	92,675

Policy PR 21 Budget Breakdown (£)

Policy PR 22

Charges for States of Jersey services - statutory

Statutory plant pest and animal disease monitoring/eradication will also remain free of charge. Again, in the event of an outbreak it is a legal requirement and in the public interest that they are controlled and eradicated.

Policy PR 22 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	78,877	78,877	78,877	78,877	78,877

Policy PR 22 Budget Breakdown (£)



Policy PR 23

Charges for States of Jersey services - commercial/private gain

Where there is a commercial benefit or private gain from the service provision, these will be charged at full cost recovery e.g. soil, water and tissue analyses including Potato Cyst Nematode counts. These charges will also apply, even where statutory inspections are required for business purposes, where the exporter benefits from the issuing of a certificate e.g. for issuing plant passports, phytosanitary certificates, animal health export certificates etc.

Policy PR 23 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	23,720	23,720	23,720	23,720	23,720

Policy PR 23 Budget Breakdown (£)

The need for research and development

1.57 In the past, the States of Jersey provided an extensive Research and Development (R&D) service for the agricultural industry, addressing a range of crop production and economic issues. However, the value of this R&D was questioned. Industry felt that much of the work conducted was not relevant, or that the data could be sourced elsewhere. Consequently, there is now no specific R&D programme, team or budget.

1.58 Currently some small-scale R&D work is undertaken by the Plant Health Laboratory on a 'needs must' basis from a modest budget (<£5,000 p.a). This concentrates on control measures against non-indigenous, statutory and harmful organisms which are both environmental and economic issues.

1.59 A number of specific cases over the last few years have highlighted the need to reconsider an R&D capability in Jersey. These include a wide variety of issues, some of which are currently being investigated:

- Potato Cyst Nematode control (yield related / pesticide reduction)
- Pesticide Maximum Residue Limits (statutory / public health)
- Oak Processionary Moth (statutory)
- Volunteer potato control (yield related / pesticide reduction)
- Gypsy Moth (statutory)
- Horse Chestnut Leafminer (statutory)
- Bio-fumigants (pesticide reduction)
- Alternatives to pesticides for blight control (pesticide reduction)

- Diffuse pollution
- Climate change scenarios
- Biofuels
- Carbon footprint
- Economic and environmental resilience to change

Policy PR 24

The need for research and development

States of Jersey to continue the independent work of the Plant Health Laboratory, responding to threats, emerging issues and statutory situations e.g. Oak Processionary Moth, Gypsy Moth, statutory diseases such as American Foulbrood of honey bees and research into pesticide alternatives such as *solanum sysimbrifolium* biocontrol of Potato Cyst Nematode.

States of Jersey and the rural sector to set up a Priorities Board to develop a long-term research and development strategy.

Policy PR 24 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	17,364	17,364	17,364	17,364	17,364

Policy PR 24 Budget Breakdown (£)



Indicative Budget Profit 2011-2015

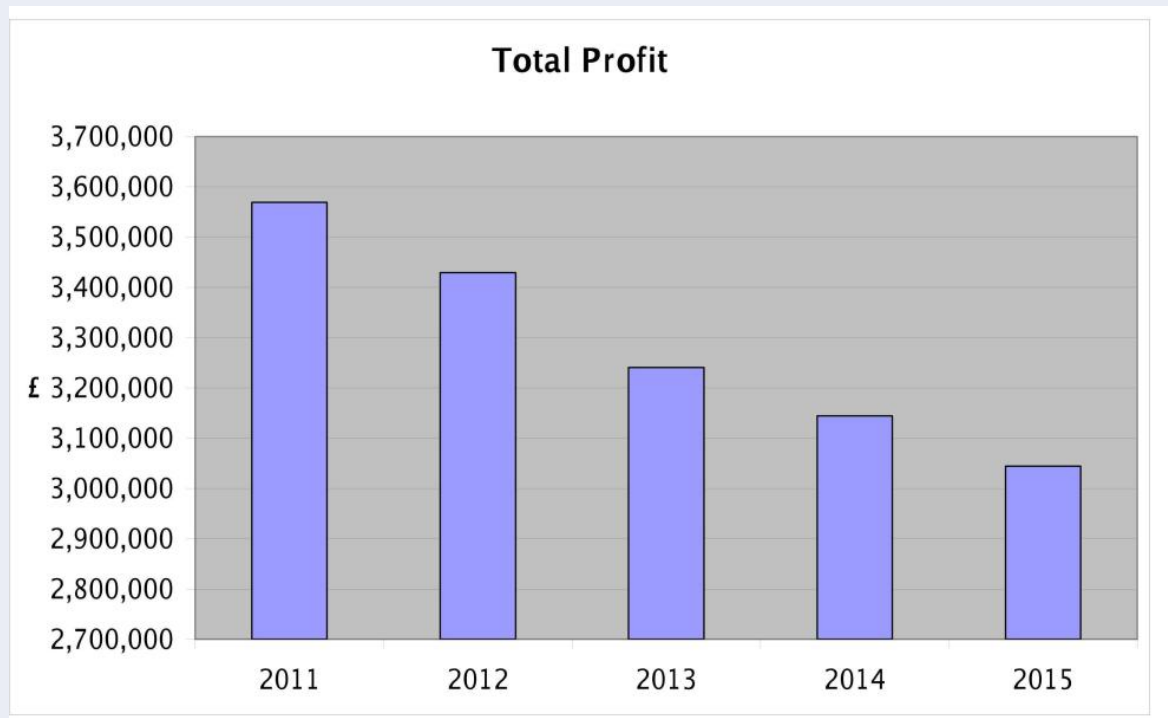


Figure 7 Rural Economy Strategy (indicative) budget forecast - Profit.

1.60 Rural Economy Strategy (RES) Notes and Assumptions - Profit

- Grant levels are consistent with the current Comprehensive Spending Review (CSR) forecast (SAP, QMP, SLA, RIS, CRS, DICS, JPPL & abattoir)
- Includes other costs that are unallocated to policies e.g. provision of agricultural statistics, administration of agricultural loans and site management
- PR3 (European Plant Protection Organisation) membership of European Plant Protection Organisation continues for RES 2011-2015
- PR5 (Organic farming) included under Countryside Renewal Scheme (CRS)
- PR11 (Collaborating to develop local markets and address food security) included under Rural Initiative Scheme (RIS)
- PR19 (Protecting the Jersey Brand) reduction in 2012 due to retirement of UK-based representative
- Staff costs relate to civil service pay scales 2011 and exclude corporate overhead



2 PEOPLE



2 PEOPLE

Rural skills, training, advice and education

2.1 The [Jersey Annual Social Survey](#)⁽³⁹⁾ indicates that nearly half (46%) of all those involved in the rural sector are aged between 16 and 24 years. Percentages fall significantly between the ages of 25 to 44 years before rising to 32% between the age group 45 - 54 years.

2.2 There are concerns that there is a lack of long-term opportunities for individuals to remain in the industry and the adverse effect it will have on the long-term sustainability of the sector.

2.3 As part of the overall strategy of Skills Jersey to review each sector, a comprehensive examination will be undertaken on the rural economy to gather labour market intelligence, including the size of businesses, sector growth, business activity and jobs and the respective qualifications needed for these positions and salaries. It will also be important to determine the key skills shortages and recruitment problems for the sector. From the data collated, a strategy can be developed for the sector to identify current skills gaps and how this can be addressed to meet future needs.

Policy PE 1

Rural skills, training, advice and education

For those currently in the rural sector a skills specific support service will be developed that will:

- Provide a package of vocational training that will form part of continuous professional development; and
- The Rural Initiative Scheme will be expanded to provide for vocational training based on business needs.

Policy PE 1 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	4,000	4,000	4,000	4,000	4,000

Policy PE 1 Budget Breakdown (£)

39 Jersey Annual Social Survey, 2009. Statistics Unit, States of Jersey

Policy PE 2

Rural skills, training, advice and education - succession planning

States of Jersey will look at overcoming some of the issues of recruitment and develop opportunities for new entrants including:

- Working with industry and industry representative bodies to offer work placements and promote opportunities in the sector to learners and their advisors
- Developing apprenticeships and access to other vocational and academic training and qualifications e.g. working with careers advisors and teachers to investigate opportunities for 16-18 year olds to attend agricultural college in the UK
- Mentoring support from those with extensive knowledge of the industry for new entrants
- Providing assistance in developing financial frameworks, such as share farming models, to allow existing, or new entrants the possibility of buying into current businesses
- An extensive review of existing trusts and funds to be undertaken to ascertain what is available, what the support can be used for and the criteria required

Policy PE 2 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	2,191	2,191	2,181	2,191	2,191

Policy PR PE 2 Budget Breakdown (£)



Access to the countryside

2.4 Rural businesses are increasingly receiving public support for maintaining and enhancing the rural landscape. The local population, businesses and tourists derive value from being able to access an attractive countryside. Therefore, it is important to maximise the opportunities for public access. Approximately 50%⁽⁴⁰⁾ of the Island is classed as agricultural land. However, current access provision is concentrated within coastal margins and some inland valleys, with limited routes across farmland.



Figure 8 St Peter's Valley: footpath.

2.5 There is sometimes conflict between ramblers, cyclists and horse riders due in part to the current network primarily designed for one group or another. From the landowners perspective there is the issue of litter and disturbance, although there is [existing legislation](#) in place to regulate this⁽⁴¹⁾. In a small area like Jersey, it is not always possible to provide separate facilities for every individual user group. Provision for multiple users must, therefore, be a primary consideration.

Policy PE 3

Access to the countryside

States of Jersey to develop a strategic document that identifies voluntary opportunities for new and better access to the countryside, ensuring these new routes link with and improve existing access routes and are safe from working machinery and do not interfere with planted crops. This document will form the basis for the involvement of user groups and access providers in order to agree an action plan. The Countryside Renewal Scheme will be targeted towards strategic access options.

Policy PE 3 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	78,114	74,114	74,114	74,114	74,114

Policy PE 3 Budget Breakdown (£)

40 www.gov.je/AgriculturalStatistics2009

41 Policing of Parks (Jersey) Regulations 2005; Policing of Roads (Jersey) Regulations 1959; Policing of Beaches (Jersey) Regulations 1959; Planning and Building (Jersey) Law 2002.

Allotments

2.6 Allotments are a good example of community agriculture as they provide the community with an opportunity to get directly involved with the rural economy by working the land and growing food for themselves and their families. The benefits of allotments can be found in the Allotment Working Group Report, Allotment Strategy for Jersey and are supported in the [The \(Draft\) Jersey Island Plan](#)⁽⁴²⁾. There is concern that allotments may impact on the agricultural land bank, but the Allotment Working Group Report identifies a minimal requirement for 52 vergées to satisfy demand within Jersey. This should be able to be satisfied from small, non-productive areas near residential developments without having a major impact on the agriculture industry.

Policy PE 4

Allotments

States of Jersey to provide initial support for the development of allotments and to allow non bone fide agriculturalists or smallholders to occupy the land where land is subject to [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#) provided it is does not form an essential part of an agricultural holding.

Policy PE 4 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	1,000	1,000	1,000	1,000	1,000

Policy PE 4 Budget Breakdown (£)

42 <http://consult.gov.je/portal/>



Community Supported Agriculture (CSA)

2.7 Rural businesses are embedded within the community. Community Supported Agriculture (CSA) is cooperation and support between a farmer and those who eat the food they produce. It is a partnership where the responsibilities, risks and rewards of farming are shared.

2.8 The consumers commit themselves to supporting the farm and providing a fair income for the farmers and benefit by receiving fresh, healthy food, having a connection with the land and a knowledge of where their food comes from and how it is grown.

2.9 Farmers receive a more secure income and a higher return for their produce.

2.10 All the produce from the farm is shared between the supporting consumers or sold locally if there is a surplus. They therefore have closer links with their local community, develop the potential to raise working capital and financial support, ensure food is locally sourced and reduce imports.

Policy PE 5

Community Supported Agriculture (CSA)

States of Jersey to investigate the scope for Community Supported Agriculture through liaison with the industry, education (countryside classrooms) and rural skills training.

Policy PE 5 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	3,130	3,130	3,130	3,130	3,130

Policy PE 5 Budget Breakdown (£)

Nutrient budgeting and green waste compost

2.11 Green waste is composted garden waste produced by an open windrow system at La Collette. Farmland is often viewed as a place of disposal for organic manures. There is little evidence of organic manures being taken into account by the farmer when undertaking nutrient budgeting, which could lead to unnecessary fertiliser use.

Policy PE 6

Nutrient budgeting and green waste compost

States of Jersey to support the voluntary use of green waste compost, promote best practice and to introduce nutrient budgeting into the Environment Plan to ensure that:

- The nutrient value of wastes and manures are correctly measured and taken into account when calculating crop fertiliser requirements
- The risk of diffuse pollution is reduced
- Waste is recycled into a useful material i.e. a fertiliser
- Soil structure is enhanced and crop growth is improved
- There is less environmental impact (lower risk of nutrient leaching)
- There is improved disease suppression
- Less artificial fertiliser is applied to agricultural land reducing imports and therefore, reducing CO2 emissions

In addition, the Rural Economy section will liaise with Transport and Technical Services to produce a report on the nutrient value and quality assurance issues related to the use of green waste in order to make it a more attractive option for the agricultural industry.

Policy PE 6 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	6,260	6,260	6,260	6,260	6,260

Policy PE 6 Budget Breakdown (£)



Climate change - mitigation and adaptation

2.12 In order to respond to climate change Jersey requires a modern, skillful, adaptable, efficient and profitable agricultural industry which is able to implement the changes necessary for a sustainable future. Increased temperatures, drier summers, wetter winters, reduced availability and higher costs of fossil fuels and fertilisers and the need to reduce greenhouse gas emissions will all challenge current husbandry practices, presenting new problems and opportunities.

2.13 To mitigate against climate change, the rural sector will need to:

- Reduce green house gas emissions arising from agricultural practices
- Investigate fully the potential to grow biofuels
- Consider fully the anaerobic digestion of agricultural and other organic wastes to reduce fossil fuel imports
- Invest in and implement methods leading to the more efficient use of energy

2.14 The States of Jersey and the rural sector are working in the following areas:

- Green waste composting to assist the building of soil organic matter ⁽⁴³⁾
- Genetic improvements to improve the efficiency of milk production (i.e. more milk per cow)
- Diet formulations designed to reduce methane emissions from livestock
- Implementation of Codes of Good Agricultural and Environmental Practice (CGAEP)⁽⁴⁴⁾
- Long-term slurry storage to improve utilisation of greenhouse gas producing compounds and reduce reliance on inorganic fertiliser
- Green cover crops to minimise soil erosion, nutrient loss to the environment and increase soil organic matter
- Energy audits to improve energy efficiency
- Grants for energy efficiency measures
- Fertiliser recommendations to optimise use of inorganic fertiliser and to maximise the use of organic manures

2.15 Reduced energy demand and greenhouse gas mitigation measures are required to avoid the predicted increase in energy use and the growth in carbon emissions. This has led to proposed measures to bring about a 20% reduction on predicted 2030 levels of domestic, Government and industrial section use by 2030⁽⁴⁵⁾.

43 See Environment Plan and 'Water issues' section

44 See Codes of Good Agricultural and Environmental Practice sub-section under 'Biodiversity issues in the rural economy' section

45 [Energy Green paper: Fuel for Thought? Environment Department, 2007. States of Jersey.](#)

Policy PE 7

Climate Change - mitigation and adaptation

States of Jersey to promote reduced reliance on fossil fuels in the rural economy through the development of a series of best practice guidelines similar to those associated with the [Farming Futures](#) guidelines⁽⁴⁶⁾ in the UK⁽⁴⁷⁾ to help industry mitigate against and adapt to climate change and, highlight measures to reduce fossil fuel use.

Policy PE 7 budget breakdown - see Policy PE 9 Climate Change - mitigation and adaptation.

Policy PE 8

Climate Change - mitigation and adaptation

To protect and increase natural carbon storage by enhancing the amount of carbon stored in agricultural soils through evaluation of soil types and husbandry techniques, timeliness of operations and by increasing soil organic matter through use of cover crops and green manures. This evaluation will form part of the Environment Plan in addition to identifying opportunities for encouraging woodland management, tree planting, protection of wetlands, and hedgerow establishment e.g. through the Countryside Renewal Scheme.

Policy PE 8 budget breakdown - see Policy PE 9 Climate Change - mitigation and adaptation.

46 such as Genetic Modification (GM) and climate change, anaerobic digestion, ground source heat pumps, solar thermal heating etc.

47 www.farmingfutures.co.uk



Policy PE 9

Climate Change - mitigation and adaptation

States of Jersey to facilitate adaptation and/or mitigation of climate change by providing additional components and criteria within the Countryside Renewal Scheme and Rural Initiative Scheme such as:

- Improved productivity as a result of reduced energy use and a more efficient use of chemicals/fertilisers/livestock feeds
- Better management of livestock wastes through, for example, anaerobic digestion of agricultural and organic wastes to reduce fossil fuel imports

Policy PE 9 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	5,727	5,727	5,727	5,727	5,727

Policy PE 9 Budget Breakdown (£)

Genetically Modified (GM) Organisms

2.16 In 1999 the States of Jersey, took the decision for the Island to remain free from growing GM crops⁽⁴⁸⁾ however, the sale in Jersey of foods and medicines containing GM ingredients has not been outlawed. In light of the recent decision by the European Commission (March 2010) to approve the cultivation of the genetically modified potato variety "Amflora" for industrial starch production, following an extensive review of environmental and safety issues, the States of Jersey should review its stance on the growing of GMOs.

2.17 The approach being taken in the UK is informative; "GM, like nanotechnology, is not a technological panacea for meeting the varied and complex challenges of food security, but could have some potential to help meet future challenges. Safety must remain our top priority and the Government will continue to be led by science when assessing the safety of GM technologies. The Food Standards Agency (FSA) is taking forward a programme of consumer engagement which will provide an opportunity to discuss with consumers their understanding of GM, their interpretation of the potential benefits, and their concerns"⁽⁴⁹⁾.

48 [Deputy A.S. Crowcroft Proposition on Genetically Modified Organisms \[P33/99\]](#)

49 [Food 2030. Department for Environment, Food and Rural Affairs, January 2010 p.61](#)

2.18 GM crops and technology could remove barriers to adapting to climate change impacts, such as wetter winters and drier summers, providing that safety remains the top priority and could also underpin sustainable growth and localised food production.

Policy PE 10

Genetically Modified (GM) Organisms

States of Jersey to evaluate its position on GM crops to ensure the Island's Government and agricultural industry have given full and proper consideration to the latest technology.

Policy PE 10 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	3,130	3,130	3,130	3,130	3,130

Policy PE 10 Budget Breakdown (£)

Amenity value of the countryside

Agri-tourism

2.19 Agri-tourism is a valid form of diversification for the farming industry and provides welcome additional income to the individual business and in certain communities, considerable benefit to the rural economy⁽⁵⁰⁾.



Figure 9 Managed footpaths are both attractive and valued by the public.

2.20 Jersey was the first holiday destination in the world to be given Green Globe status in recognition of its contribution to 'green' tourism, involving such schemes as coastal footpaths, cycle tracks and the green lane network. The Green Globe was developed in 1994 in response to the Rio Earth Summit, and is an environmental management programme for travel and tourism companies and tourism destinations, that has members in around 100 countries. Jersey Tourism promotes the Island as a tourist destination based on, amongst other attractions, the beauty of the countryside.

50 [The Draft \(Jersey\) Island Plan supports amenity value of the countryside in Objective EVE 1 Tourism; Policy EVE 3 Tourism Support Facilities in the Countryside, and Policy NE 8 Access and Awareness.](#)



2.21 Developing agri-tourism can promote the Island’s rural landscape and traditional farming practices and provide additional revenue for the Island and farmers. The Tourism section of the Economic Development Department is keen to promote and encourage:

- Farm stay developments, such as self-catering in farm style accommodation (for example; ‘[Featherdown Farm](http://www.featherdownfarm.co.uk)’ in Ireland / UK⁽⁵¹⁾)
- Farm tours, such as food trails and walks and horse-riding etc.
- Local products through small-scale producers

Policy PE 11

Agri-tourism

States of Jersey to consider the development of an agri-tourism strategy and action plan for Jersey.

Policy PE 11 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	313	313	313	313	313

Policy PE 11 Budget Breakdown (£)

Policy PE 12

Community Supported Agriculture (CSA) supporting agri -tourism

There is an opportunity to combine Community Supported Agriculture with agri-tourism. E.g. Hamptonne Country Life Museum could be developed as a traditional mixed working farm providing accommodation for people to enjoy working holidays, tending crops and caring for the animals, similar to the Willing Workers On Organic Farms (WWOOFers) scheme.

Policy PE 12 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	1,000	1,000	1,000	1,000	1,000

Policy PE 12 Budget Breakdown (£)

51 <http://www.featherdownfarm.co.uk>

Indicative Budget People 2011-2015

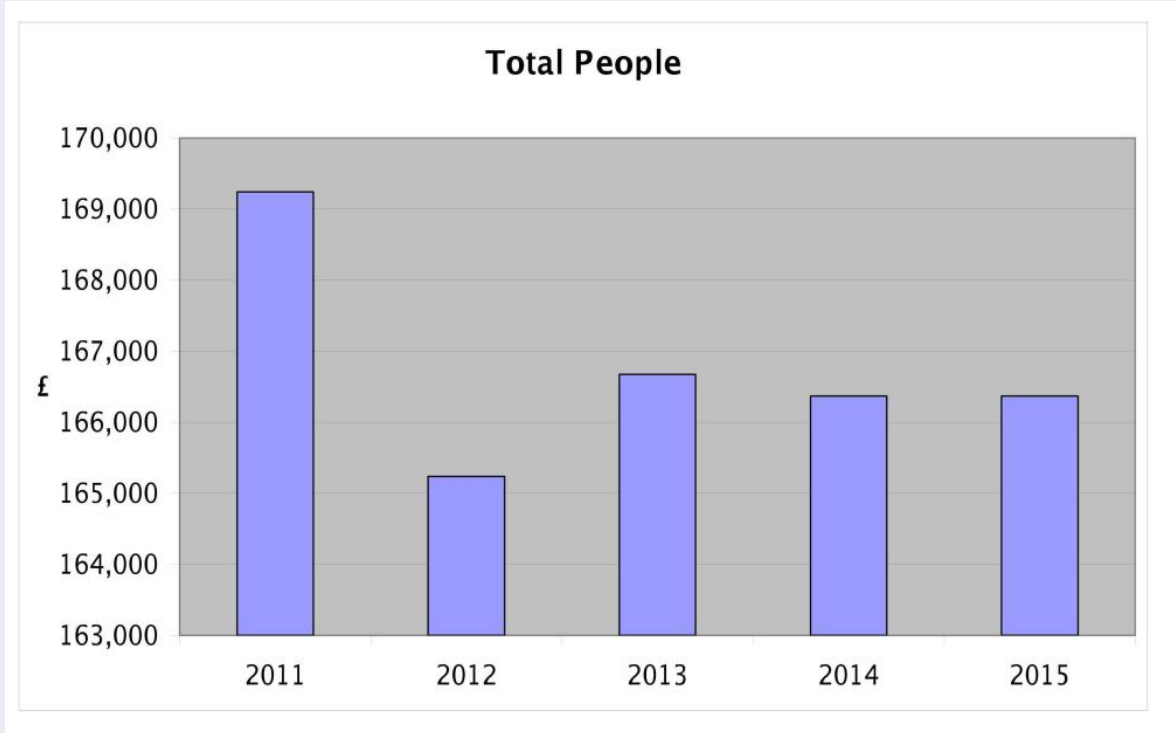


Figure 10 Rural Economy Strategy (indicative) budget forecast - People.

2.22 Rural Economy Strategy (RES) Notes and Assumptions - People

- PE3 (Access to countryside) Higher expenditure in 2011 due to development of access strategy
- PE6 (Nutrient budgeting and green compost waste) and PE7,8 & 9 (Climate change and mitigation) amalgamated into single budget line
- Staff costs relate to civil service pay scales 2011 and exclude corporate overhead



3 ENVIRONMENT

3 ENVIRONMENT

Biodiversity issues in the rural economy

3.1 Biodiversity is the variety of living things and can be used as a measure of the environmental health of our own Island. The United Nations Conference on Environment and Development (the 'Earth Summit') held in Rio de Janeiro in 1992 was the largest ever gathering of world leaders, it was testament that environmental issues should receive the highest priority on the world's political agenda.

3.2 150 Heads of State signed the [United Nations Convention on Biological Diversity, 1992](#), which requires Governments to draw up national plans and programmes for the sustainable use and conservation of biological resources. Jersey's semi-natural areas provide the backbone for the Island's biodiversity and are prioritised within the:

- [Biodiversity Strategy, 2000](#)⁽⁵²⁾.
- [Countryside Character Appraisal, 1999](#)⁽⁵³⁾.
- [The State of Jersey, 2005](#)⁽⁵⁴⁾.
- [States Strategic Plan, 2009-2014](#)⁽⁵⁵⁾.

3.3 Consequently, nature conservation is beginning to emerge more clearly in Jersey, through the development of the Countryside Renewal Scheme (CRS) the continuing designation of ecological Sites of Special Interest and the identification of Environmentally Sensitive Areas⁽⁵⁶⁾.

3.4 Despite its small size, Jersey is highly prized for its rich and diverse habitats and the particular mix of wildlife is unique. Coastal heath and cliff slope, woodlands, meadows, wetlands, sand dunes and the marine and inter-tidal zones represent key habitat types in the Island and need to be protected from the effects of development or economic activity in the countryside.

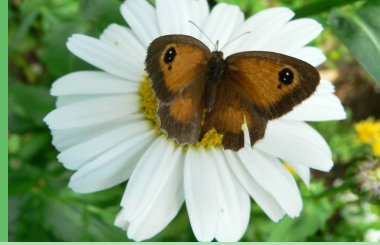
52 Biodiversity: A Strategy for Jersey. Planning and Environment Committee, 2000. States of Jersey

53 Jersey Island Plan Review: Countryside Character Appraisal. Planning and Environment Committee, 1999. States of Jersey

54 The State of Jersey: a Report on the Condition of Jersey's Environment. Environment and Public Services Committee, 2005. States of Jersey

55 States Strategic Plan 2009-2014. States of Jersey, 2009.

56 [The Draft \(Jersey\) Island Plan recognises the issues and challenges facing the natural environment over the next ten years and beyond in Objective NE 1 Natural Environment; Indicator NE 1 Natural Environment; Policy NE 1 Conservation and Enhancement of Biological Diversity; Policy NE 2 Species Protection; and Proposal 6 Landscape Management Strategy.](#)



3.5 Farming has a significant impact on biodiversity. Many farmers are providing a range of habitats for wildlife on farmland through farming activities and through the CRS. Farming provides the landscape within which we live and, the rich cultural heritage that we benefit from and the produce that we require.

3.6 The States of Jersey has committed itself to international agreements⁽⁵⁷⁾ to protect biological diversity and should integrate consideration for biological diversity into all local decision making.

3.7 Modern farming techniques, the impact of larger agricultural equipment on roads and infrastructure, use of pesticides and intensive methodologies have the potential to have a negative affect on the natural environment. However, the use of modern farming techniques and technology can go hand-in-hand with modern biodiversity conservation techniques.

Policy E 1

Best practice in farming

States of Jersey to develop and implement a comprehensive range of best practice guidance specific to the protection of roads and infrastructure, the maintenance and enhancement of biodiversity on farms to comply with both Jersey's local and international agreements and obligations⁽⁵⁸⁾.

Policy E 1 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	0	0	4,550	9,100	9,100

Policy E 1 Budget Breakdown (£)

57 e.g. [United Nations Convention on Biological Diversity, 1992](#).

58 See Codes of Good Agricultural and Environmental Practice sub-section

Codes of Good Agricultural and Environmental Practice (CGAEP)

3.8 Codes of Good Agricultural and Environmental Practice (CGAEP) are practical guides to help farmers and growers meet their legal obligations. They explain the legislation and provide advice on best practice. Implementing the advice contained within Codes of Good Agricultural and Environmental Practice ensures that environmental impact is minimised whilst allowing agricultural development to continue.

Policy E 2

Codes of Good Agricultural and Environmental Practice

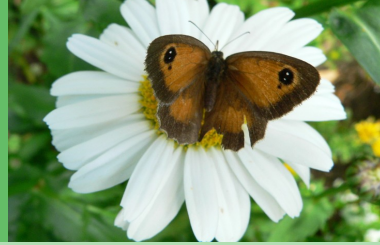
States of Jersey to develop Codes of Good Agricultural and Environmental Practice (CGAEP) to include the above and to require documentary evidence from those receiving public support that the CGAEP are being complied with.

Policy E 2 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	4,640	4,640	4,640	4,640	4,640

Policy E 2 Budget Breakdown (£)

Timetable:

- Water Code updated in 2009
- Soil Code Consultation 2010-2011
- Air Code Consultation 2011



Environment Plan: rural businesses improving biodiversity through targeted farm management

3.9 Farmers and landowners play a crucial role in managing, preserving and improving all aspects of the rural landscape. Jersey's countryside is home to a wide range of plants, insects, reptiles, amphibians, birds and mammals which can be affected by inappropriate habitat management. The quality of life of the Island's human population is enhanced through enjoyment of a well managed countryside where they can relax; enjoy fresh air, wildlife and a beautiful landscape.

3.10 The countryside is also a working environment from which those employed in the sector seek to produce profitable sustainable businesses, whilst preserving the quality of the Island's natural resources such as soil, air and water. This is a complex balancing act, requiring farmers and landowners to acquire a wider range of knowledge and skills and to plan in order to ensure their businesses remain viable, whilst maintaining and enhancing the quality, biodiversity and beauty of the environment in which they work.

3.11 For each farm and land area, there is a need to identify what is most important - key environmental features - and how best to manage them. This will help to target support in the most beneficial places and ensure that the farm is managed with regard to the best environmental practice.

Policy E 3

Environment Plan

Each farmer and/or landowner receiving public support is required to produce a plan detailing how they will implement Codes of Good Agricultural and Environmental Practice (CGAEP), best practice guidelines, safeguard the Island's natural resources, mitigate against climate change and enhance biodiversity on their land holdings.

Each farm and holding will have different features, habitats, resource issues and biodiversity building a picture of the Island's countryside, stating its current condition and identifying opportunities for improvement. This document will be called an 'Environmental Plan' (EP) and will include mandatory items such as the protection of soil and water. In addition, it will include voluntary options for environmental enhancement.

Policy E 3 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	4,695	4,695	7,825	7,825	7,825

Policy E 3 Budget Breakdown (£)

Identifying key features within an Environment Plan

3.12 Measures to protect soil and water and to ensure high welfare⁽⁵⁹⁾ standards will be mandatory. However, the Environment Plan will also identify and provide recommendations for the maintenance and enhancement of key features on land covered by the plan. This will include areas of woodlands, wetlands, wet meadow and other permanent grassland, ponds, marsh, dunes, heathland, cliff slope and boundary features (banks, hedges, trees and ditches). In addition to, species protected by [law](#), Biodiversity Action Plans, opportunities to create wildlife corridors, potential links to the current countryside access network and to assist in the restoration of damaged features.

Policy E 4

Environment Plan - better targeting of grants

The work required in developing Environment Plans will be supplemented through the development of a Countryside Renewal Scheme (CRS) component, these funds to be available to all farmers and landowners for two years after the adoption of this policy. This Countryside Renewal Scheme component would contribute to the cost of employing individuals and/or companies with relevant expertise, and a full knowledge of the States wildlife and biodiversity objectives, to help survey the holding and compile the Environment Plan documentation.

Following completion of this initial work, it is proposed that annual updating of the Environment Plan would become conditional on the receipt of rural aid payments. Countryside Renewal Scheme funding will then be targeted at the optional environmental enhancement projects identified in the Environment Plan, in order to improve targeting of public money into areas that deliver the greatest benefit and value for money. Similarly, Rural Initiative Scheme funds will be targeted at the energy efficiency and climate change mitigation projects.

See Countryside Renewal Scheme.

⁵⁹ see Livestock health planning section



Wildlife corridors

3.13 Semi-natural areas and areas of high biodiversity are fragmented in Jersey and therefore, require links that allow for wildlife to move between them (i.e. connectivity). Valley-side woodland, valley-bottom meadow, marsh and wetland areas, hedgerows and walls and banques are all defined as being valuable in a local context. Opportunities for improving habitat condition and connectivity such as enhancement or provision of hedgerows, field margins or land parcels should be supported.

Policy E 5

Wildlife corridors

[The Draft \(Jersey\) Island Plan](#)⁽⁶⁰⁾ identifies potential habitat corridors, which could be used to target management regimes.

States of Jersey to continue and develop the Countryside Renewal Scheme components, regarding boundary features. Increasing connectivity provides wildlife corridors and target applications that increase connectivity between semi-natural areas and areas of high biodiversity to enhance ecological processes.

Policy E 5 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	616	616	616	616	616

Policy E 5 Budget Breakdown (£)

⁶⁰ <http://consult.gov.je/portal/>

Understanding wildlife in the countryside

3.14 Research into the Island's local ecology is essential. Research ensures that management of biodiversity, conservation policy and legislation is appropriate and adheres to international obligations. Regular monitoring is necessary to identify changes within the rural environment to ensure that Jersey's local and international obligations are being met and to demonstrate a successful response from industry.



Figure 11 Jersey butterflies are used as indicator species to monitor the state of Jersey's environment (Gatekeeper butterfly).

Policy E 6

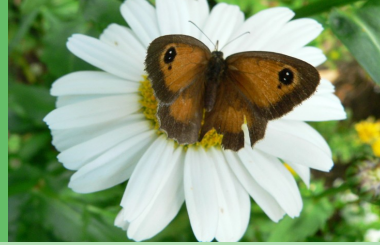
Monitoring changes in biodiversity

[The State of Jersey, 2005](#)⁽⁶¹⁾ will be supported by an annual Rural Habitat Statement (due to be published in 2011). The Rural Habitat Statement outlines key issues in the rural environment relating to Biodiversity.

Policy E 6 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	148,372	148,372	148,372	148,372	148,372

Policy E 6 Budget Breakdown (£)

61 The State of Jersey: a Report on the Condition of Jersey's Environment. Environment and Public Services Committee, 2005. States of Jersey



A Biological Records Centre

3.15 A large number of people use the countryside on a daily basis and these people could potentially be helpful in building a picture of the Island's wildlife, by recording what they see. More information is needed on the precise status of species and habitats in the wider countryside. The development of simple methods for recording species and habitats would allow the users of the countryside (including farmers) to provide valuable data that would add to the natural history knowledge base in Jersey and, to greatly assist in the development of informed decisions to promote and enhance biological diversity across the Island's countryside.

Policy E 7

A Biological Records Centre

States of Jersey to investigate the likely costs involved in the development of the local records centre a) in conjunction with the other Channel Islands and b) an independent Jersey local records centre.

Develop simple wildlife recording methods and protocols that can be used by anyone interested in collecting information to record data on wildlife and local ecology.

Policy E 7 Budget Breakdown	2011	2012	2013	2014	2015
Total estimated costs	10,000	10,000	10,000	10,000	10,000

Policy E 7 Budget Breakdown (£)

Water issues

Tackling diffuse pollution from agricultural sources

3.16 A plentiful supply of good quality water is essential for human activities and for the health of local ecosystems. As a sector, agriculture is the largest land user in Jersey and therefore, has a key role to play in the protection and enhancement of our shared water resource.

3.17 Jersey, in common with many places in the rest of Europe, has elevated nitrate levels in streams and groundwater. Studies have shown that although not the sole contributor, agricultural activities are a major contributor of nitrate in surface and groundwater. At certain times of year, Jersey Water is unable to comply with the 50 mg per litre limit of nitrate⁽⁶²⁾ in the public mains water supply because of nitrate contamination in ground and surface water supplies.

3.18 As well as having a detrimental effect on the environment, losses of fertiliser, soil and pesticides can be costly for farmers, and are unsustainable. Increasingly, the market is also demanding that food is produced in a sustainable and environmentally friendly manner.

Policy E 8

Tackling diffuse pollution from agricultural sources

A Diffuse Pollution Project (DPP) will work with land owners and users to better understand the issues and define and implement practical agricultural best management practices in several water catchments in the Island. Water quality in these areas will be monitored throughout to assess the impact that these changes have.

Policy E 8 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	3,130	3,130	4,695	4,695	4,695

Policy E 8 Budget Breakdown (£)

62 [Water \(Jersey\) Law 1972](#)



3.19 The DPP will be a voluntary scheme that will use a participatory approach with the local farming community. By identifying good practices, piloting the introduction of management measures and facilitating skills updates, the DPP will also contribute to and underpin preparations for the requirement for an Environment Plan for each farm as set out elsewhere in this document⁽⁶³⁾.

3.20 In the trial areas, at the same time as best management practices are being planned and implemented, targeted water quality data will be collected to assess the impact of the best management practise interventions. The lessons learned from the pilot scheme will then be used to develop strategies for Island-wide implementation. This scheme will also be integrated with the Countryside Renewal Scheme, so that any additional components introduced into the CRS are compatible with the DPP scheme objectives.



Figure 12 An adequate supply of good quality water is essential for all.

3.21 In the longer term, if these voluntary measures prove to be unsuccessful, the designation of Water Catchment Management Areas under the Water Pollution (Jersey) Law, 2000 will be considered. Under these provisions, it would be possible to 'specify conditions for the prevention, control, reduction or elimination of pollution or of the risk of pollution in controlled waters'.

Livestock health planning

3.22 Livestock health planning has developed considerably over the last few years but can vary hugely ranging from a single sheet of paper from an agricultural merchant to a detailed veterinary plan. The benefits of producing a comprehensive health plan include animal health and welfare becoming a high priority for farm staff with production improved through adherence to a structured plan.

3.23 Improved animal health leads to improved welfare, decreased use of medicines and improved productivity. Farm health planning includes identifying problems and solutions e.g. calf diarrhoea, Johne's control, liver fluke control or possibly proving herd freedom from specific diseases e.g. Bovine Viral Diarrhoea (BVD), Infectious Bovine Rhinotracheitis (IBR) and Leptospirosis.

3.24 Health planning includes reviewing current status by reference to records such as production and mortality, diet, blood sampling and/or faeces sampling. Information is reviewed to identify knowledge gaps, as well as identifying areas for improvement, setting targets, agreeing actions e.g. routine vaccinations and other treatments e.g. milk fever control.

63 See Environment Plan in 'Biodiversity issues in the rural economy' section

Policy E 9

Livestock health planning

States of Jersey in conjunction with the Veterinary profession, to assist dairy and livestock producers in producing comprehensive animal health and welfare plans for their farms. This would be achieved by inviting suitable qualified professionals to provide Continuing Professional Development and training opportunities for livestock owners and the veterinary profession. Investigate training provision with Guernsey.

Policy E 9 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	3,130	3,130	3,130	1,399	1,399

Policy E 9 Budget Breakdown (£)

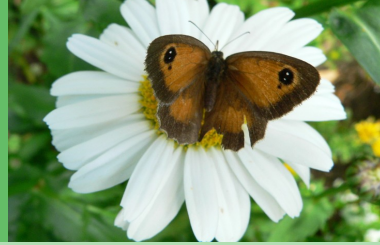
3.25 A lack of adequate safe livestock handling facilities is a disincentive to routine inspection and treatment of farm animals e.g. footcare, vaccination, and dagging sheep. The inability to handle stock and provide treatment quickly and efficiently in order to relieve pain and suffering is unacceptable. Good handling facilities are welfare friendly for stock, safe for stockhandlers and should be an essential item of farm equipment. Provision of suitable handling facilities will increase livestock productivity, reduce the time taken to handle and treat stock, safeguard farm staff and improve the health and welfare of farm animals.

Policy E 10

Improving livestock handling and animal welfare

States of Jersey to implement, with the livestock industry and veterinary profession, a review of farm facilities and husbandry practices with reference to improving livestock handling and animal welfare. In addition, in consultation with the livestock industry, update the Jersey Codes of Practice for the Welfare of Farm Animals, including items such as, the possible elimination of the use of tethers; routine vaccinations and unnecessary mutilations (e.g. tail docking pigs); handling facilities and bobby calf facilities and care.

Policy E 10 budget breakdown - see Rural Initiative Scheme.



3.26 The health of farm livestock in Jersey has long been recognised as being of a very high standard compared to other countries. Maintenance of these high health standards has involved import restrictions on live animals and certain animal products to ensure diseases are not imported. Clinical history and sporadic testing indicate that IBR, BVD and Leptospirosis are not present in the Island. However, Jersey would have to undertake a testing programme and apply to the EU for official recognition.

3.27 The current interest in exporting cattle from Jersey would be greatly assisted if the Island is designated free from the above diseases. Where possible, this can be via EU Decision or may be by self declaration to the OIE (Office International des Epizooties, the World Organisation for Animal Health).

Policy E 11

Disease free status and cattle exports

States of Jersey to continue to work in partnership with the livestock industry to achieve recognition of herd freedom from Infectious Bovine Rhinotracheitis, Bovine Viral Diarrhoea and Leptospirosis in order to promote disease free status and assist cattle exports.

Policy E 11 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	1,565	1,565	1,565	1,565	1,565

Policy E 11 Budget Breakdown (£)

Agricultural industry planning needs

Safeguarding the agricultural land bank

3.28 The appearance of Jersey's countryside is largely a product of human intervention, mainly through farming. Agriculture has been going through changes for several decades, due to changing technologies and economic forces. Tourism is targeting a 'greener', more discerning visitor, and leisure and recreation are making new demands on rural areas. In addition, there is increasing demand for land for housing, light industry, community or social uses which are also putting the agricultural land bank under considerable pressure. However, the ratio of land that comes into the land bank through transactions versus that which is lost through change of use is 10:1 (see Figure 13).

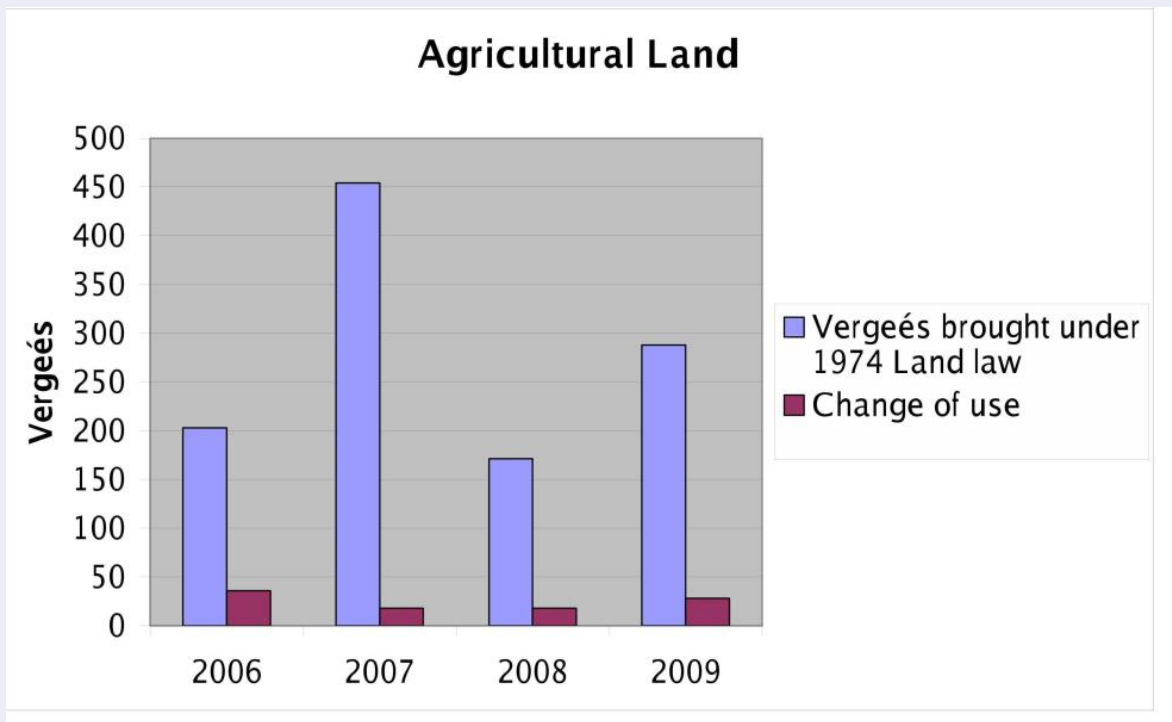


Figure 13 Agricultural Land controlled under the Agricultural Land (Control of Sales and Leases) Law, 1974 from 2006-2009.

3.29 Currently only about 50%⁽⁶⁴⁾ of agricultural land is subject to the [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#). Under this law "agricultural land" means land, including land under glass, used or capable of being used for any purpose of agriculture or horticulture, but does not include any dwelling house or outbuilding. Therefore, land use is determined by Planning Legislation (on approximately 18,500 vergées), where there is no requirement for it to be occupied by an agriculturalist or a smallholder.

64 www.gov.je/AgriculturalStatistics2009



3.30 Land owned by the States, the Crown and the Parishes is exempt from the [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#).

3.31 It is therefore essential that the [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#) is properly enforced. The [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#) allows for the imposition of conditions regarding the use and occupancy of agricultural land which protects agricultural land and restricts occupancy though these conditions can be amended by the Minister.

3.32 This is important in order to:

- Maintain a viable agriculture industry
- Keep brown cows in green fields
- Allow legitimate diversification
- Underpin the Rural Economy (support local industries)
- Protect the countryside
- Provide environmental benefits
- Support tourism

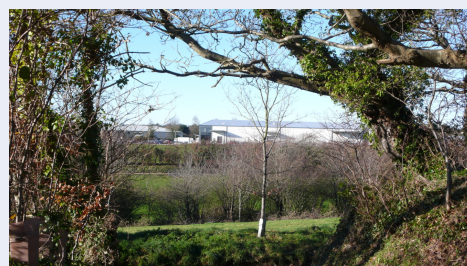


Figure 14 New agricultural building: Jersey Dairy, Trinity.

3.33 However, planning and land control need to be flexible enough to allow the industry to adapt to the needs of their customers in order to remain competitive, but robust enough to prevent the erosion of a valuable and finite resource. The call for no future development on agricultural land may be counter productive, as agricultural or rural businesses may need to invest in further infrastructure to meet customer demands.

3.34 The argument that allowing a free market for land use will enable the land to be put to its best economic use is considered unrealistic in Jersey and it is felt that this could result in land being removed from the agricultural land bank.

3.35 Changes within the industry in recent years, have driven an increased demand for land for potato production, dairy farming and other agricultural activities. (What constitutes an agricultural activity has been defined following advice from the Solicitor General and as such commercial liveries and orchards are recognised agricultural activities). Policies are required in order to retain land for commercial agriculture.

Policy E 12

Safeguarding the agricultural land bank - Maintenance of the Agricultural Land (Control of Sales and Leases) (Jersey) Law, 1974

The [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#) will be maintained in its present form to regulate the use of agricultural land until the review of the range of agricultural conditions which can be imposed under the Law is completed (see policy E14).

Policy E 12 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	51,043	51,043	51,043	51,043	51,043

Policy E 12 Budget Breakdown (£)

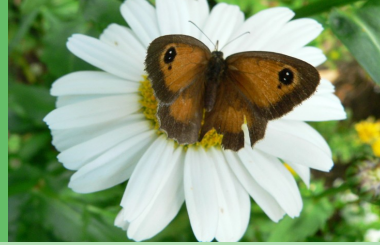
Policy E 13

Safeguarding the agricultural land bank - Enforcement of the Agricultural Land (Control of Sales and Leases) (Jersey) Law, 1974

The [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#) will be enforced through the Land Controls and Development Section, through routine monitoring of land use with appropriate action being taken where the law is not being complied with. In addition, the criteria for smallholder and bone fide agriculturalists will be reviewed, including the right for ex bone fide agriculturalists and smallholders to continue to occupy agricultural land.

Policy E 13 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	54,602	54,602	54,602	51,904	51,904

Policy E 13 Budget Breakdown (£)



Policy E 14

Ensuring land is retained for commercial agriculture

The States of Jersey will review the range of agricultural conditions which can be imposed under the [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#) (a, b, c, d, e, f, g and h) to ensure that land is retained for commercial agriculture where the need can be demonstrated.

The review will include the use of agricultural land for domestic curtilage, leisure and sport and the case for a separate register of horses and equine use.

Policy E 14 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	28,650	28,650	28,650	28,650	28,650

Policy E 14 Budget Breakdown (£)

Policy E 15

Safeguarding the agricultural land bank - Ensuring all land not subject to the Agricultural Land (Control of Sales and Leases) (Jersey) Law, 1974 is incorporated under the Law

The States of Jersey will investigate the possibility of extending The [Agricultural Land \(Control of Sales and Leases\) \(Jersey\) Law 1974](#) to incorporate all agricultural land currently not subject to the Law.

Policy E 15 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	1,565	1,565	1,565	1,565	1,565

Policy E 15 Budget Breakdown (£)

New agricultural buildings and extensions, change of use, horticultural structures and strategic planning⁽⁶⁵⁾

3.36 Currently there is no strategy identifying the future infrastructure needs of the rural sector. However, the Agricultural Buildings Capacity Study provides information on agricultural buildings and their use.

3.37 As part of the Rural Economy Strategy 2005, a web page allowing businesses to advertise for sale or lease any agricultural land or buildings that they no longer require is now available at www.gov.je⁽⁶⁶⁾. This web page allows the industry to voluntarily provide information on the availability of agricultural buildings and land continuously for a three month period. This will help identify vacant premises which may meet an existing business requirement without the need to construct a new agricultural building. The site addresses concerns that the current practice of advertising in the Jersey Evening Post for three nights within a three month period is insufficient for both landlords and tenants.

Policy E 16

New agricultural buildings

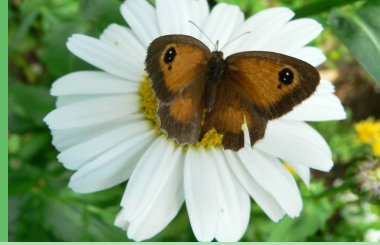
Maintain and expand the agricultural buildings capacity database and identify short/medium and long-term strategies for development of the Rural Sector in consultation with the industry.

Policy E 16 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	1,565	1,565	1,565	1,565	1,565

Policy E 16 Budget Breakdown (£)

65 [Draft \(Jersey\) Island Plan has a strong presumption against proposals for new agricultural buildings, extensions and horticultural structures in Policy ERE 6 New Agricultural Buildings, Extensions, and Horticultural Structures unless it can be demonstrated that the proposed development will contribute to the viability of the agricultural industry.](#)

66 www.gov.je/agbuildings



Derelict and redundant glasshouses⁽⁶⁷⁾

3.38 Due to decisions taken by the industry and supported by the Rural Economy Strategy 2005, a number of glasshouses are now empty giving rise to potentially redundant sites. There are also areas of dilapidated glass which are seen as having potential for development. Therefore, it is essential that before glasshouses are allowed to be removed or developed, consideration should be given to the needs of any future rural economic enterprises.

Policy E 17

Modern glasshouses

Modern glasshouses should be (in order of priority):

- Kept as production units
- Be given planning permission for other agricultural use
- Be returned to a green field site

Policy E 17 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	616	616	616	616	616

Policy E 17 Budget Breakdown (£)

67 [Draft \(Jersey\) Island Plan Policy ERE 7 considers derelict and redundant glasshouses.](#)

Policy E 18

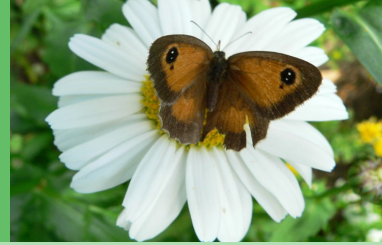
Derelict or non-viable glasshouses

Derelict or non viable glasshouses should be (in order of priority):

- Be given planning permission for other agricultural use
- Considered for partial development to fund the cost of returning to a green field site
- Be returned to a green field site

Policy E 18 Budget Breakdown (£)	2011	2012	2013	2014	2015
Total estimated costs	616	616	616	616	616

Policy E 18 Budget Breakdown (£)



Indicative Budget Environment 2011-2015

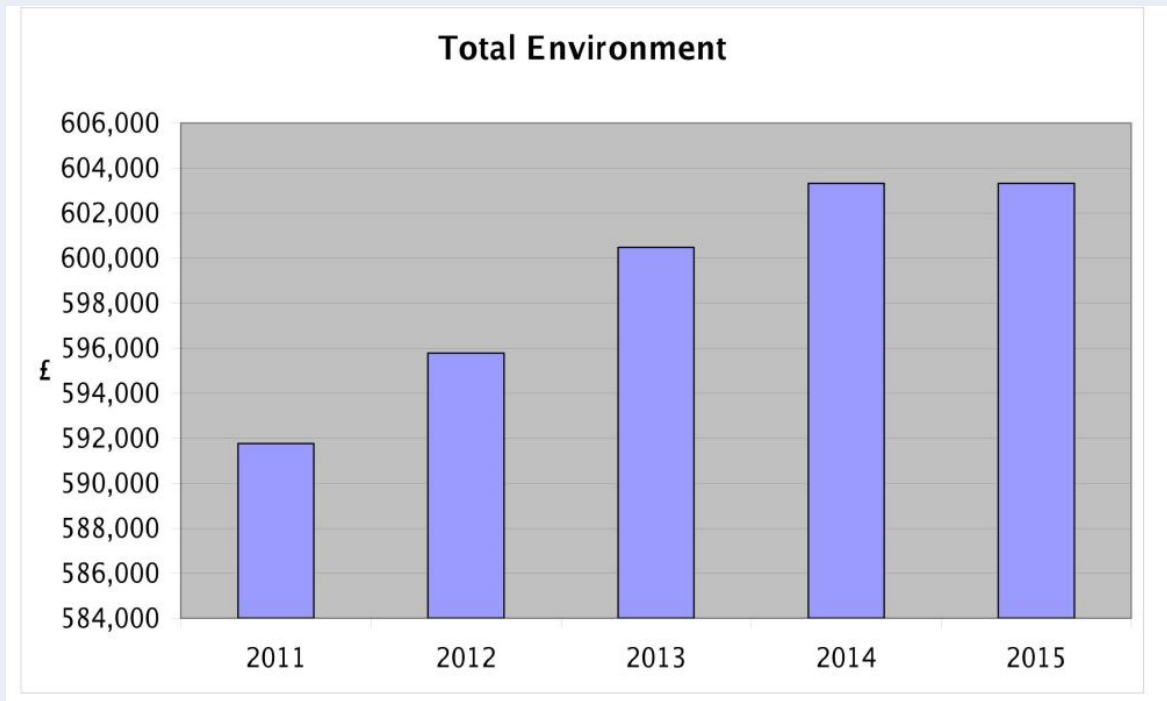


Figure 15 Rural Economy Strategy (indicative) budget forecast - Environment.

3.39 Rural Economy Strategy (RES) Notes and Assumptions - Environment

- E1 (Best practice in farming) best practice guidance specific to the protection of roads and infrastructure and maintenance of biodiversity developed from 2013
- E4 (Environmental Plan - better targeting of grants) included under Countryside Renewal Scheme (CRS)
- E10 (Improving livestock handling and animal welfare) included under Rural Initiative Scheme
- Staff costs relate to civil service pay scales 2011 and exclude corporate overhead

Rural Economy Strategy 2011-2015

Indicative Budget Forecast

Rural Economy Strategy 2011-2015 Indicative Budget Forecast

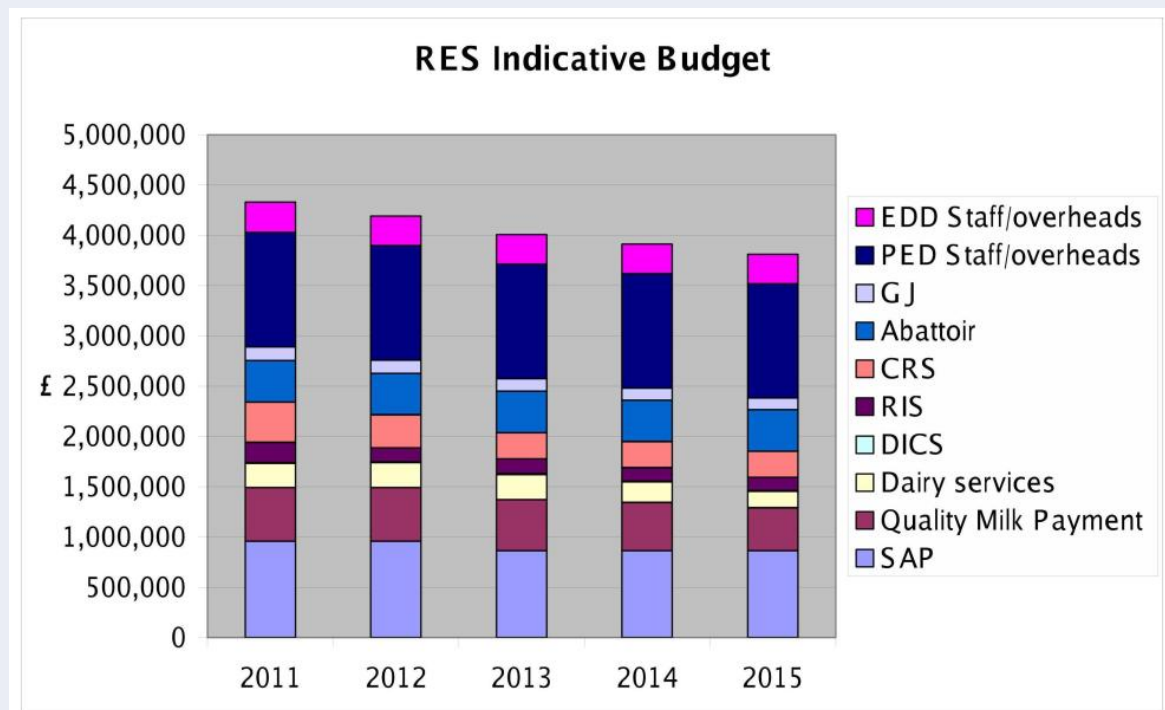


Figure 16 Rural Economy Strategy total (indicative) budget forecast 2011-2015.

Rural Economy Strategy (RES) Notes and Assumptions - General

- Rural Economy Strategy adopted by States of Jersey
- Includes staff (both PED & EDD) and staff overhead costs based on 2011 civil service pay scales.
- Staff reduction due to Comprehensive Spending Review from 2011
- Staff costs based on Environmental Management and Rural Economy section but there may be additional inputs from other sections such as Environmental Protection (DPP) and States Veterinary Service (abattoir, welfare and farm health planning) as the Strategy is delivered
- No allowance for inflation or wage increase all costs based on 2011 budget
- No corporate overhead included

Appendix 1 Economic Affairs Scrutiny RES Sub-Panel Recommendations and Measures of Progress

**Appendix 1 Economic Affairs Scrutiny RES Sub-Panel
Recommendations and Measures of Progress**

Appendix 2 - Rural Economy Measures of Progress

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Appendix 3 - Miscellaneous

Appendix 3 - Miscellaneous

Abbreviations

Abbreviations

BAP Biodiversity Action Plans

BVD Bovine Viral Diarrhoea

CA Community Agriculture

CITES Convention on International Trade in Endangered Species

CGAEP Codes of Good Agricultural and Environmental Practice

CMD Chief Ministers Department

CPD Continuing Professional Development

CRS Countryside Renewal Scheme

CSA Community Supported Agriculture

CSR Comprehensive Spending Review

DICS Dairy Industry Costing Scheme

DPP Diffuse Pollution Project

EDD Economic Development Department

EMRE Environmental Management and Rural Economy

EP Environment Plan

ESA Environmentally Sensitive Area

EU European Union

FM&WMP Farm Manure and Waste Management Plan

FSA Food Standards Agency

GJPA Genuine Jersey Products Association

GMO Genetically Modified Organisms

GVA Gross Value Added

HES Household Expenditure Survey

IBR Infectious Bovine Rhinotracheitis

JBRC Jersey Biological Records Centre

JD Jersey Dairy

JEG Jersey Export Group

JF&FP Jersey Food and Farming Partnership

JFSS Jersey Food Security Strategy

JMMB Jersey Milk Marketing Board

JPPL Jersey Product Promotion Limited

KC Kite Consulting

OIE Office International des Epizooties, the World Organisation for Animal Health

PCN Potato Cyst Nematode

PDO Protected Designation Names

PED Planning and Environment Department

PFN Protected Food Names

PFNA Protected Food Names Association

QMP Quality Milk Payment

R&D Research and Development

RES Rural Economy Strategy

RIS Rural Initiative Scheme

RJA&HS Royal Jersey Agricultural & Horticultural Society

SAP Single Area Payment

SLA Service Level Agreement

SSI Sites of Special Interest

SPS Single Payment Scheme

TTS Transport and Technical Services

UK United Kingdom

Definitions

Definitions

The review document refers to the following definitions:

Agricultural activity: this includes horticulture, vegetable production, fruit growing, seed growing, dairy farming, livestock breeding and keeping, forestry, the use of land as grazing land, meadow land, market gardens and nursery grounds and the preparation of land for agricultural uses.

Agricultural land: land being capable of use for agriculture.

Bobby calf: an unwanted calf, slaughtered within a few days of birth.

Bona fide agriculturalist: someone employed in land dependent primary production, obtaining income from agriculture or horticulture which meets a target level of economic activity as defined by the Strategy.

Codes of Good Agricultural and Environmental Practice: guidance documents that interpret and explain legal requirements rather than describing best practice.

Cross compliance: a set of conditions administered by the States of Jersey to ensure that grant and subsidy payments received by farmers adhere to measures and actions taken to support and protection of wildlife and biodiversity, environment and the rural landscape.

Economies of scale: an economic term that refers to the reducing cost per unit as more items are produced.

Environmental Management and Rural Economy: the section of Government that incorporates the sub-sections of Natural Environment (countryside officers and ecologists), Land Controls, Plant Health (the Plant Health Laboratory) and Rural Economy (the administrative side of the former Agriculture and Fisheries department). EMRE consists of officers from both the Economic Development Department and the Environment Department.

Environment Plan (EP): a professional independent environmental audit undertaken on the farm that identifies the key features and best practice management tasks that will safeguard and improve the biodiversity, soil, water and landscape.

Gross value added (GVA): GVA measures the value of economic activity taking place in Jersey and can be broken down into the GVA of each sector of the economy. It is calculated as the sum of the profits of businesses and earnings of employees.

Horticulture: includes, among much else, work in ornamental gardens and arboreta, tree nursery work, the development and care of civilised parks and urban and suburban roadsides, the care of individual shrubs and trees, topiary work, garden designs, landscaping and garden care.

New entrants: new people or organisations that have recently commenced business within the rural sector.

Open windrow: composting garden or green waste, such as grass cuttings, pruning and leaves in elongated rows in an open air environment where the material can break down in the presence of oxygen.

Participatory approach: a participatory approach to policy making and implementation is an attempt to actively involve all participants in a two-way process of dialogue, negotiation and decision-making in order to help ensure that the activities to be undertaken are practical and can be supported by as many of the stakeholders as possible.

Productivity: in general, productivity measures the amount of output produced per unit of input. For example, if a business can produce more output without increasing the number of inputs, its productivity has risen. For Jersey, labour productivity can be calculated as amount of output, measured by GVA in real terms, produced per unit of labour input, measured by the number of full-time equivalent employees.

Profitability: in general, accounting profits are calculated as the revenue of a business less its operating costs, including wages, input materials and overheads. For example, if a business has revenue of £1m and operating costs of £0.8m, its profit will be £0.2m. For Jersey, a measure of profits enters the calculation of gross value added (GVA).

Public goods: goods and services provided by the government that are freely available to anyone.

Rural economy: the cumulative revenues from business activity derived from the use of agricultural land and the countryside (i.e. businesses which derive their income from land dependent activity).

Smallholder (part time or small scale agriculturist): a person actively participating in land dependent primary production which meets a reduced level of economic activity compared with a bona fide agriculturalist.

User pays: cases where it would be appropriate for the beneficiary of a service to pay for its use, rather than taxpayers as a whole.

List of Respondents to the Rural Economy Strategy 2011-2015 Consultation

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RESPONDENTS TO SUCCESS OF RES 2005 (REQUEST FOR FEEDBACK 9 APRIL - 15 MAY 2009)	RESPONDENTS TO RES 2011-2015 GREEN PAPER (CONSULTATION PERIOD 9 MARCH - 20 APRIL 2010)	ECONOMIC AFFAIRS SCRUTINY PANEL HEARINGS / TRANSCRIPTS (HELD BETWEEN 3 JUNE - 13 JULY 2010)	RESPONDENTS TO RES 2011-2015 WHITE PAPER (CONSULTATION PERIOD 23 JULY - 3 SEPTEMBER 2010)
Jersey Farmers' Union (John E. Le Maistre - President)	Jersey Farmers' Union (John E. Le Maistre - President)*	Jersey Farmers' Union	Jersey Farmers' Union (John E. Le Maistre - President)
Royal Jersey Agricultural & Horticultural Society (James W. Godfrey - Chief Executive)	Jersey Milk Marketing Board & Royal Jersey Agricultural & Horticultural Society* (joint submission)	Jersey Milk Marketing Board & Royal Jersey Agricultural & Horticultural Society (joint hearing)	Jersey Milk Marketing Board & Royal Jersey Agricultural & Horticultural Society (joint submission)
Comité des Connétables (K.P. Vibert - Chairman)	The Jersey Royal Company Ltd*	The Jersey Royal Company Ltd	William Church (submission on behalf of The Jersey Royal Company Ltd, and as an existing member of the Genuine Jersey Products Association)
Fauvic Nurseries Ltd (W. Stanley Payn)	Albert Bartlett & Sons Limited*	Albert Bartlett & Sons Limited	Art in the Frame Foundation and The Harbour Gallery (Pat Robson - Director)
Stephen Luce	The National Trust for Jersey (Charles Alluto - Chief Executive)*	The National Trust for Jersey	Paul de Gruchy
I.H. & A.P. Mitchell	Jersey Landowners' Association (Harry H. Baudains - Chairman)*	Farm Fuels	Jersey Landowners' Association (Harry H. Baudains - Chairman)
Jersey Fishermen's Association (Don Thompson - Chairman)	Jersey Sea Farms (Tony Legg)*	Minister for Economic Development	Jersey Aquaculture Association (Tony Legg - Secretary)
	Laurence Agnes**	Skills Jersey	Fisheries and Marine Resources Advisory Panel (Mike Taylor - Chairman)
	David Bisson*	The Channel Islands' Co-operative Society Limited	The Channel Islands' Co-operative Society Limited (Colin Macleod - Chief Executive Designate)
	David Buxton*	Genuine Jersey	Genuine Jersey Products Association (John Garton - Chief Executive)
	Jersey Climate Action Network (Mark Forskitt - Chair)*		Jersey Climate Action Network (Nicholas Palmer - spokesman)
	Jersey Trees for Life (Conrad Evans - Arboricultural Officer)		Jersey Trees for Life (Conrad Evans - Arboricultural Officer)
	Christine Carter**		Royal Jersey Agricultural & Horticultural Society Horticultural Committee
	Steven Carter*		Health Improvement, Public Health Department (Andrew Heaven - Head of Health Improvement)
	Jersey Organic Association*		Darren and Julia Quénauld
	Vers Les Mont Organic Farm (Stephen Jones)*		Jonathan Jones
	Laurent Coenen**		Graham Le Lay
	Sally Coenen**		Nicolas Jouault
	Environment Scrutiny Panel*		The Jersey Chamber of Commerce (Ray Shead - President)
	Jennifer Holley**		Kevin C Keen
	Robert Le Mottée**		Penelope Lee
	Roger Noel**		
	Dr Peter Nichols**		
	Nicholas Palmer*		
	Evelyn Perchard**		
	Adrian Walton**		
	*Green Paper policy document **Green Paper questionnaire		

