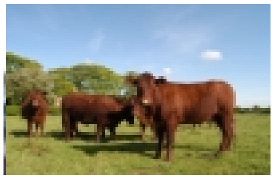
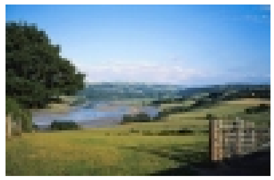




Farming in London's Green Belt

Mark Holmes

www.adas.co.uk

Farming in London's Green Belt

- Background to farming in London's Green Belt
- Farmers future confidence and challenges
- Opportunities / barriers and solutions

Farming in London’s Green Belt Study 2005

- Examined current farming activity in London and future activity, completed in May 2005
- Investigated London farmers connection to local supply chains
- Investigated farmers future intention

Farmers’ Voice

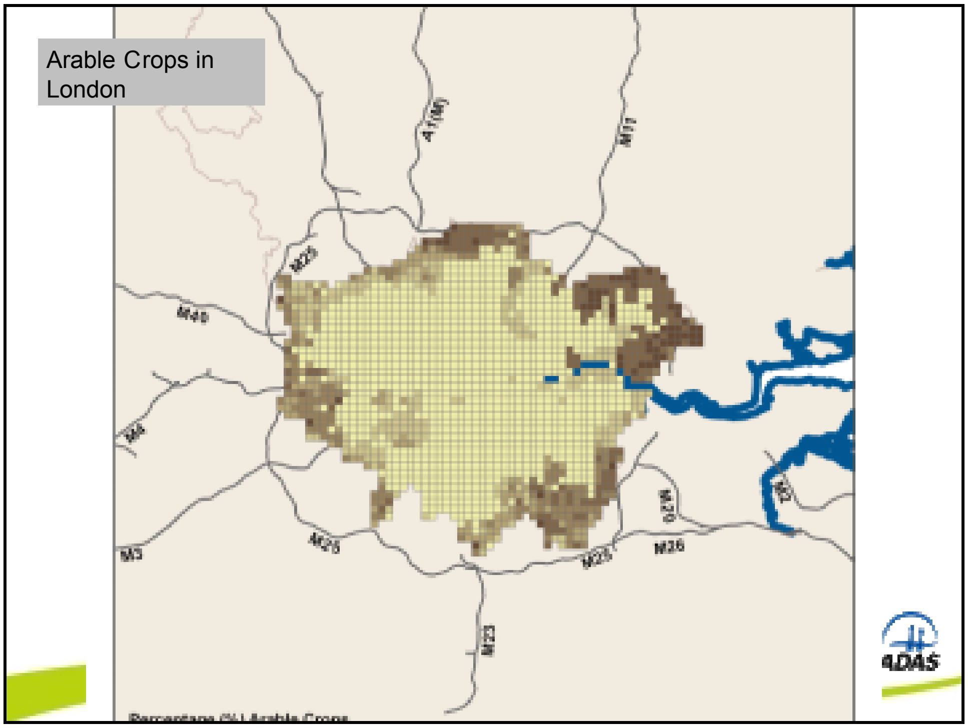
- Farmers’ Voice is an annual ADAS survey of attitudes & opinions among farmers in England & Wales
- January 2008 2,310 replies received ➔ robust findings
  - to give farmers the opportunity to have their say
  - to inform policy makers and decision makers at national and regional level

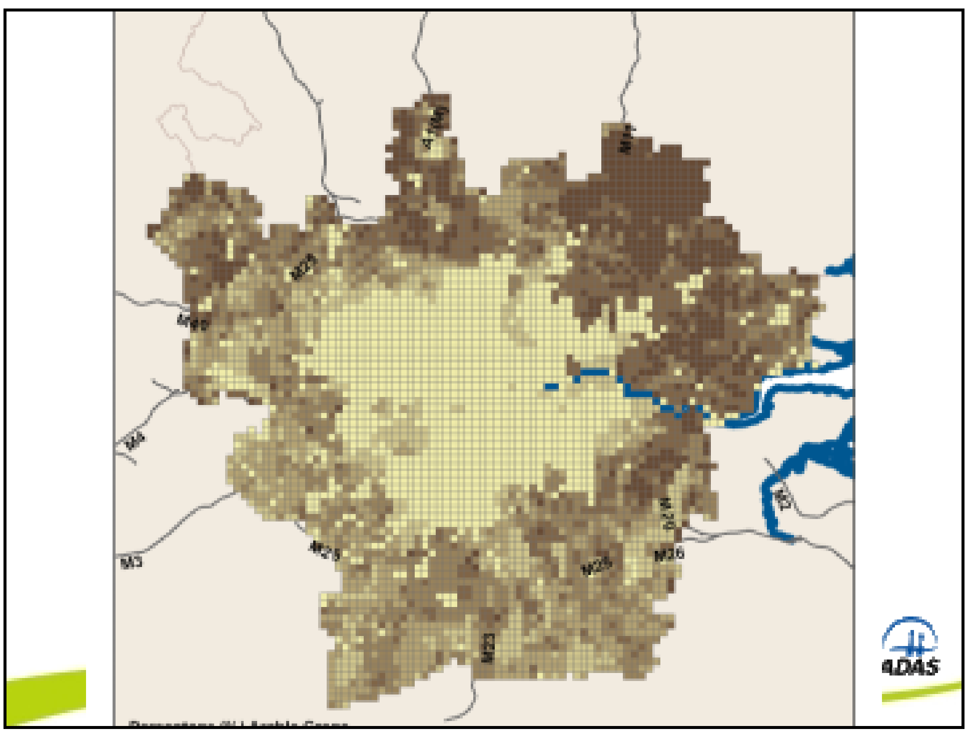
Farming in London's Green Belt Study 2005

- Examined farming within the M25 including all 33 London boroughs
- To increase sample added next concentric layer just outside the M25
- Used 2003 Agricultural Census data (For this presentation updated maps using 2005 data)
- Consultation with sector via telephone & postal survey, focus groups, one to one interviews

Farming in London's Green Belt Study 2005

- 2003 Agricultural Census data 423 holdings
- 0.25 % of all holdings in England
- Total land managed 13,608 Hectares
- Of this area about half is rented and the other half owner occupied
- Farms range in size from 0-20 ha to those larger than 200 ha
- Less than 10% of the land was organic
- Contribution excluding diversified activity at 2005 prices is **less than £8 million**


Arable Crops in London
A1(M)
M11
M25
M40
M4
M3
M20
M26
M23
M2


M25
M40
M4
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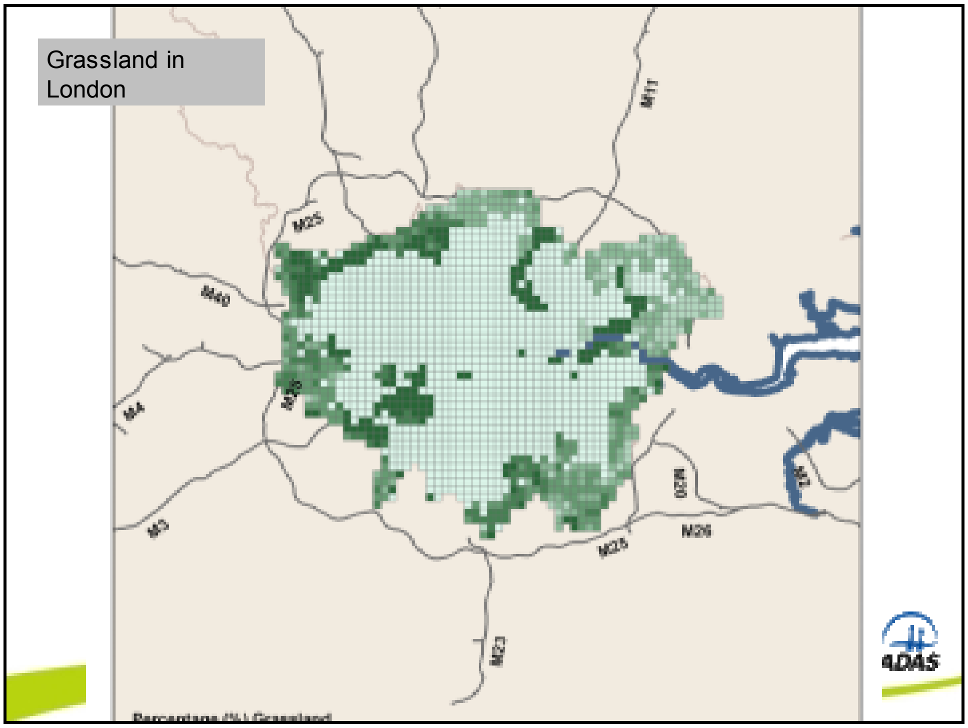
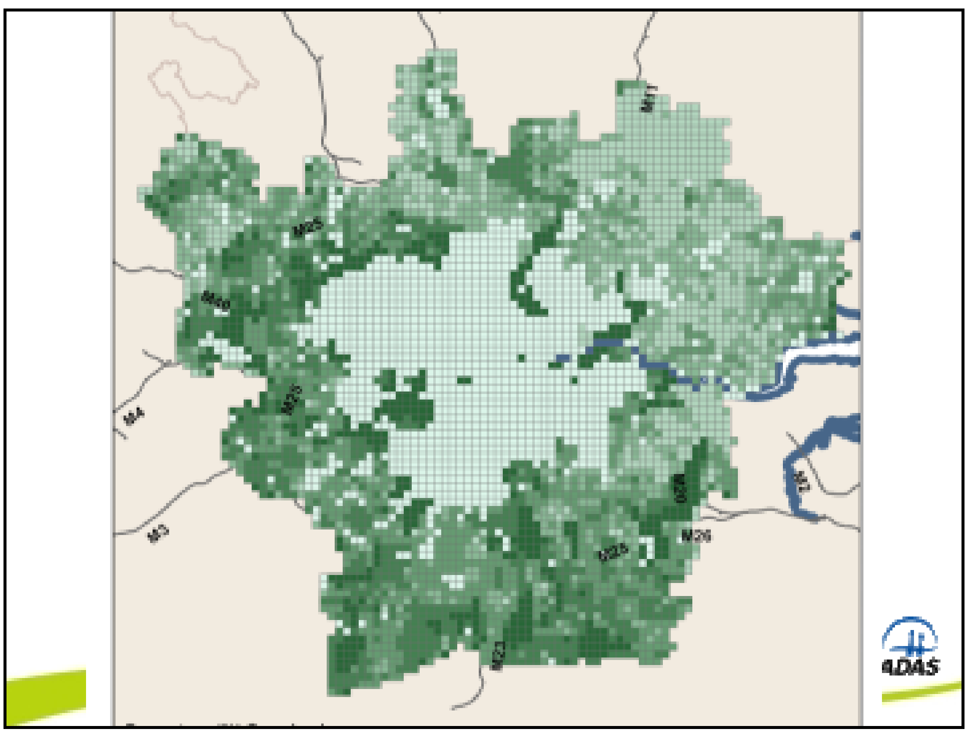
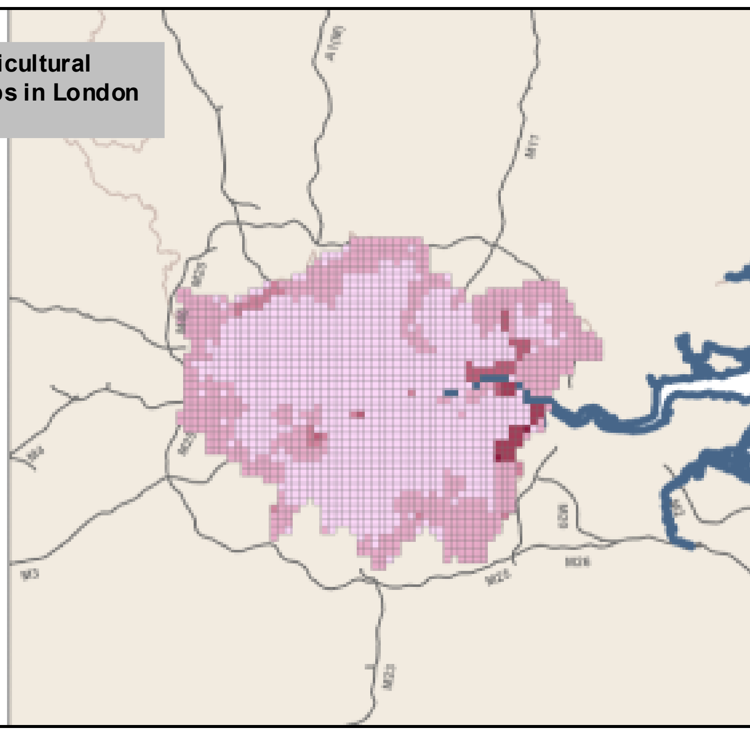

Grassland in London
M25
M40
M4
M3
M11
M20
M26
M2
M23
ADAS
Percentage (%) Grassland

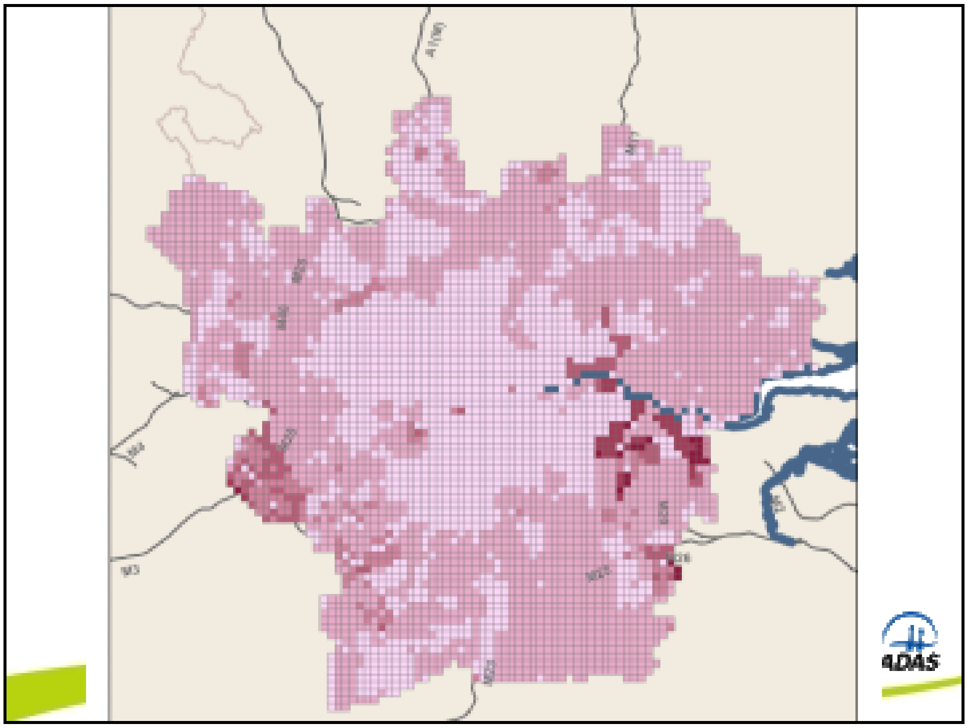

M25
M40
M4
M3
M11
M20
M26
M2
M23
ADAS

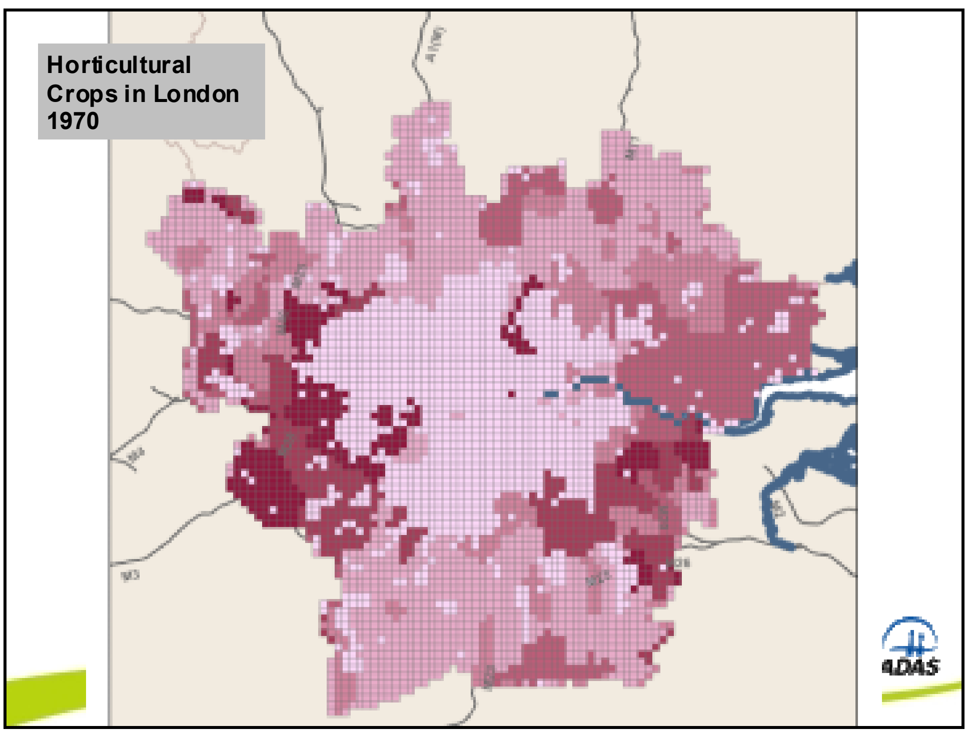
Farming within London 2005 Study

- The amount of permanent pasture in relation to the amount of stock suggests that a large amount has been given over to equine use
- Many of the livestock farmers have reduced numbers in recent years mainly due to the lack of infrastructure (access to abattoirs, markets and problems of farming on the urban fringe (dogs etc..)

Horticultural Crops in London 2005






Horticultural
Crops in London
1970

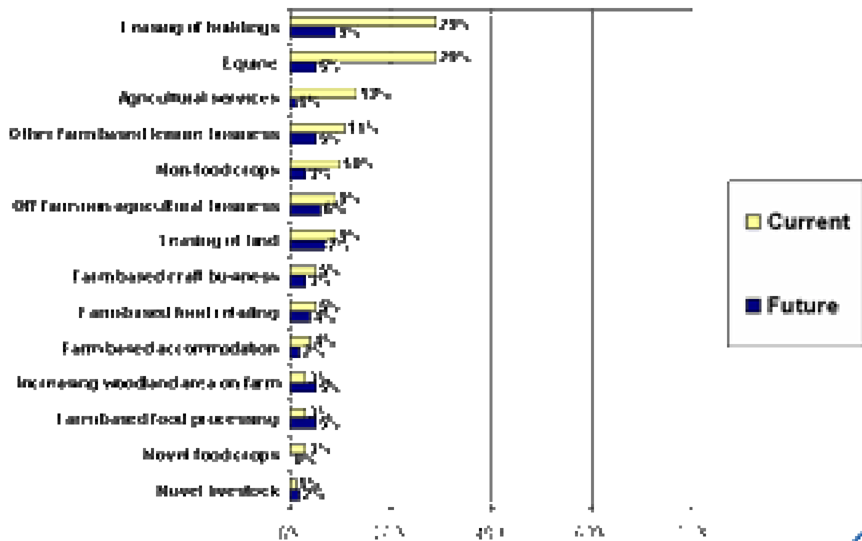
Adding value to produce

- Over a third of the London farms are adding value as food and drink producers
- A few selling through own or other farm shops the rest through direct marketing as postal or internet
- Consultation with farmers' markets and wholesalers felt there was insufficient supply of organic food produced in the London area the view from farmers was contradictory

Diversification

- Diversified activity very important to London farmers
- Diversified income account for almost a third of farm income much higher that the rest of the country much more than national average
- Range of diversified enterprises is extensive

Type of diversification London 2005



Leasing of land

- 2005 study identified farmers interest in releasing more land for allotments, community growing schemes
- Need to identify models of land release that suit all parties farmers, community groups, planners

Barriers to diversification London 2005 study

% saying "MAJOR PROBLEM"	London Farming sample (151) %	Farmers Voice 2004 sample (1,770) %
Planning legislation	47	35
Lack of capital	23	34
Recruiting suitable staff	19	16
Environmental legislation	19	18
Access to land	12	19
CAP Reform	6	15

2005 study - Access

- Most farms have a footpath or nature trail accessible at the moment average length is 2.7km
- Significant extra length of footpath could be added if improvements could be made
- 55% of farmers were not interested in making paths/trails more accessible to the public

Crime

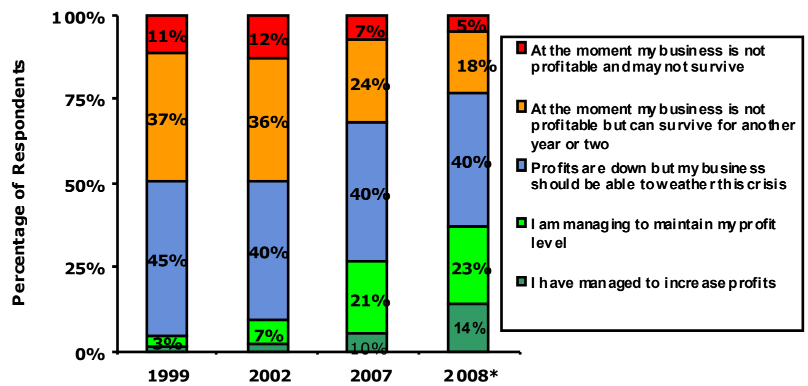
- Farm crime in London greater than many areas of the UK
- Crime problems are equipment theft, trespass, burglary and vandalism.
- Around one in four farmers feel that these crimes has had a very great impact on their business.
- Fly tipping and fires/arson are the other main crimes mentioned by farmers.
- Recent incidences of crime related to high fuel costs and the stealing of red diesel
- Crime is seen as a barrier to people utilising public spaces
- Perception that greater access more chance of attracting the wrong element
- Also health and safety and impact on insurance worries about

Farm profitability London 2005 study

- Many of the farmers considered that their businesses are in reasonable financial health although this is often due to diversification
- Recent surge commodity prices in 2007.08
- Future profitability ? Rapidly increasing input prices such fertiliser

Business performance trends

Please indicate how well your business is coping at the moment by choosing one of the statements below.

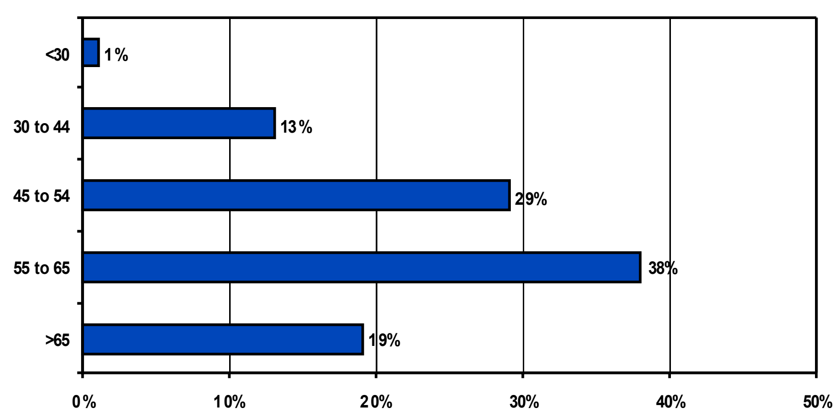


Base: 2,310 in 2008; 2,007 in 2007; 1,604 in 2002 and 2,354 in 1999.

Note: In 2008, SLR's have been used to weight farm size. SGM's used in previous years.

Farmers' Age

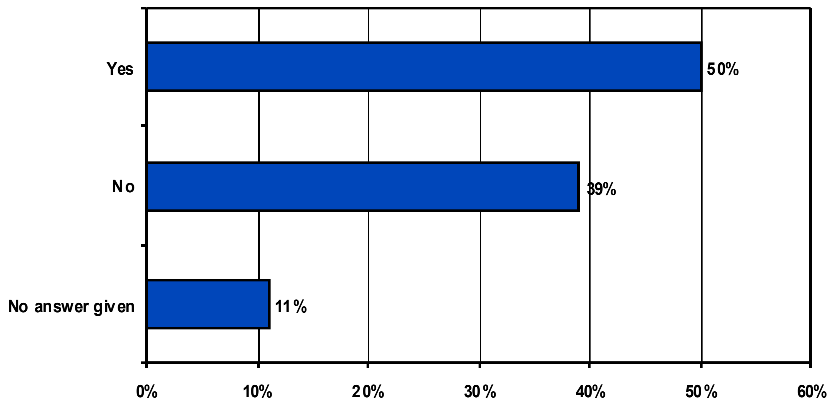
What is your age now?



Base: 2,310 farmers

Intention to pass business on

Do you intend to pass on the business in your lifetime?

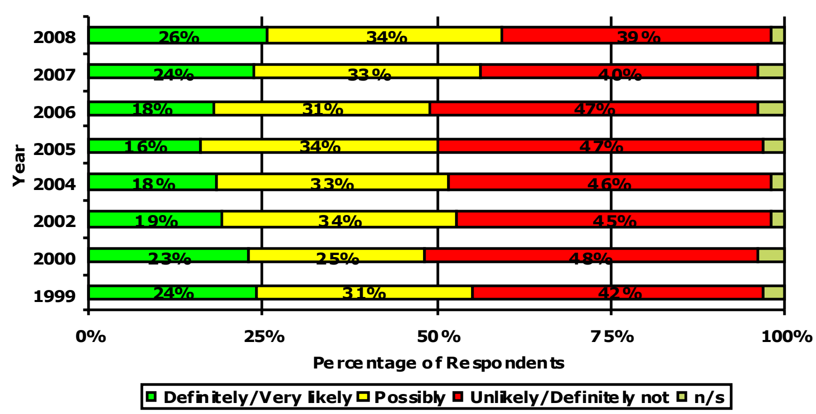


Base: 2,310 farmers

Trends in family succession

Do you expect a member of your family to take on the farm business after you?

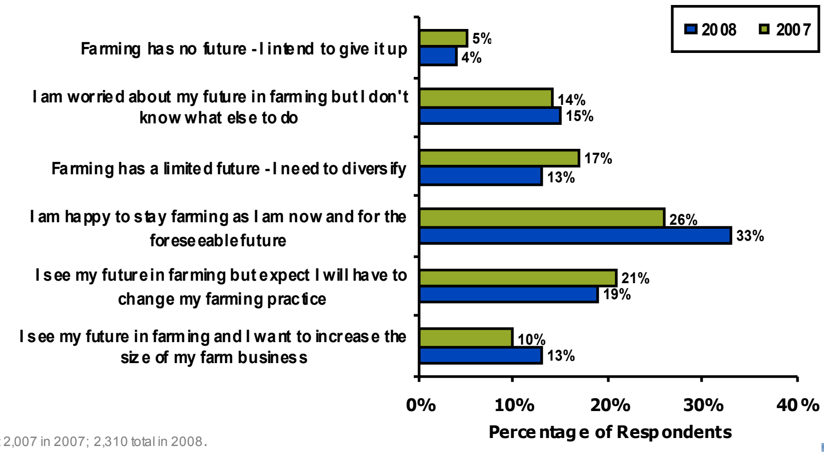
Trend showing reversal since 2006. Showing signs of confidence?



Base: Those who feel the survey is relevant to them.

Attitude towards farming

Which one of the following statements best reflects your current attitude towards British farming?



Base: 2,007 in 2007; 2,310 total in 2008.

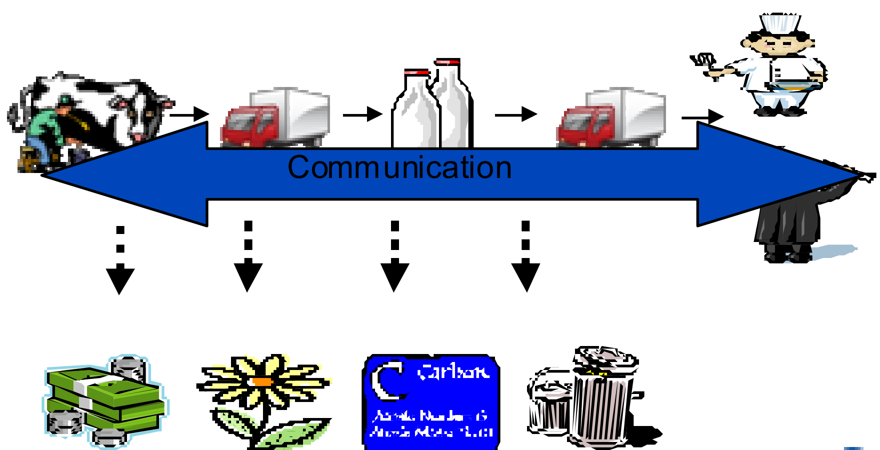
Summary

- Relatively few own and manage the majority of land in London's Green Belt
- In the context of London's economy farming is not significant
- Building strong regional supply chain from South East, East of England and other regions are equally important
- However farming can make a very important contribution to London's environment and communities
- Investment in farming in London has the opportunity to benefit all

Opportunity / Barriers

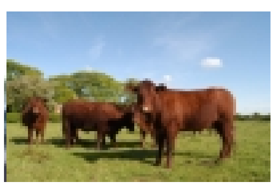
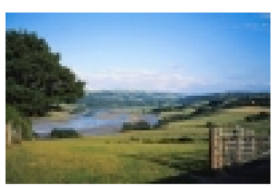
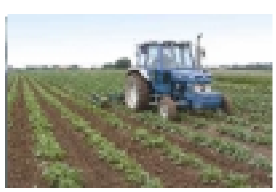
- The opportunity is proximity to people
  - Local food markets
  - Community food projects
  - Diversified activities
- Barriers
  - Planning
  - Processing infrastructure
  - Crime
  - High commodity price
  - Reluctance to change

Reconnecting local farming with local opportunities



Solutions to enable change

- **Leadership –** Solutions maybe funded by the public sector but need to be guided by the private sector, farmers need to be involved.
- **<u>Expert facilitation</u>** – Bridging the gap between farmers and the end target market
  - Facilitating local food supply chain development
  - Facilitating farmer collaboration
  - Community engagement
- **Skills, technical advice**
- **<u>It takes time</u>**

Thank you

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