FOREWORD

The Gloucestershire Rural Issues Task Force was formed in 1998 and published its first Agricultural Strategy for Gloucestershire in 2000. Since then the Government has published The Rural White Paper, 'Our Countryside - The Future'; there has been an appalling outbreak of Foot and Mouth Disease, which badly affected Gloucestershire; the English Rural Development Plan has come into being; and the lot of almost every farmer in the County and in the whole of UK has got worse. Few are making any profit at all.

There have to be fundamental changes in farming practices and structure if the countryside is going to be maintained as the public appears to wish and we are to continue to grow much of our own food, rather than import it. The recent report by Sir Donald Curry, commissioned by the Government into the Future of Farming and Food, holds a glimmer of hope for the industry and rural Britain, but only if implemented in full. But this is not enough on its own, there needs to be a concerted effort, particularly by farmers themselves, but supported by every relevant organisation and agency to make the changes happen smoothly and effectively, remembering the whole time that agriculture is dependent on a whole range of natural factors. One simply cannot say change now and expect the weather to co-operate, neither can one change the time it takes for an animal to be born, to grow and to produce. The Gloucestershire Rural Issues Task Force felt that in these circumstances the strategy needed to be revised and brought up to date.

The principal change in the structure of the strategy has been to introduce a new section titled 'Achieving the Objectives'. In this we have tried to identify what needs to be done and by whom. Unless those organisations and agencies identified in this section actually take the action suggested, then this will remain merely another useless strategy gathering dust in cupboards across the County, whilst one of our most precious assets wastes away.

I am grateful to all those who have helped in the production of this document and to all who commented on the various drafts. I have been encouraged by those, not least Gloucestershire County Council, who have already committed to helping to deliver it. I have also been encouraged by the attitude of many farmers. Business Link Gloucestershire have recently published a report on a series of meetings with farmers and a major conference held at the Royal Agricultural College. It is titled 'Revitalising British Agriculture – How we can help ourselves'. I commend this strategy to you as a way of supporting them in this.

Henry Robinson

HENRY ROBINSON
Chairman
Gloucestershire Rural Issues Task Force

SUMMARY

Strategic Aim

To regain the economic, environmental and social benefits for Gloucestershire that come from a vigorous and competitive agricultural sector

Strategic Objectives

- To help the agricultural sector in Gloucestershire manage the inevitable changes over the next decade successfully so that it is competitive, forward-looking and profitable
- To assist the agricultural sector in Gloucestershire market itself so that customers are more aware of agricultural issues and more local produce is used locally
- To ensure that those working in the land-based sector in Gloucestershire have the skills needed to compete in world markets
- To increase the recognition of the role that the farmer and land manager does and can play in maintaining a diverse countryside and in sustaining the wider rural economy
- To make diversification a reality rather than a theory

AN AGRICULTURAL STRATEGY FOR GLOUCESTERSHIRE

2002 - 2005

Strategic Aim

To regain the economic, environmental and social benefits for Gloucestershire that come from a vigorous and competitive agricultural sector.

INTRODUCTION

Gloucestershire is a rural county despite the urban areas of Gloucester and Cheltenham. There is a wide range of agricultural activity, including timber production. The size of enterprise varies hugely from small dairy farms or market gardens to large estates. The environmental conditions also differ between the Forest of Dean, through the rich alluvial soil of the Severn Vale to the limestone uplands of the Cotswolds. Against this background a vigorous and competitive agricultural sector is vital for Gloucestershire because:

- Economically there are 1700 land-based businesses in the County.
- Environmentally much of Gloucestershire is protected landscape, land of outstanding natural beauty, which needs to be managed and sustained for future generations to enjoy and benefit from.
- The beauty of the landscape, which is maintained by agriculture, attracts a great many of the tourists who visit the County and sustain its tourism industry.
- Socially, many rural communities in the County will suffer if a vibrant agricultural base, together with a whole range of other enterprises, is not maintained.

An Agricultural Survey in Gloucestershire was carried out in March 2000. 882 farms and associated businesses were asked to take part, 245 (nearly 30%) did. The results are summarised at Annex A.

THE ISSUES

The Attitude of Farmers

- The 2000 Agricultural Survey of Gloucestershire found that 52% of farmers 'believed that, as in the past, farming would adapt to economic difficulties and survive'. However only 14% 'thought farming was still a profitable business with a future'.
- Unless farmers themselves believe in the future, are prepared to seize opportunities, learn new skills, work with one another and change then any strategy will fail.

Economic

- Agriculture must be profitable. Even before Foot and Mouth Disease many agricultural prices were below the cost of production. This situation threatens the continued existence of many smaller farms and there is a very real risk that large areas of the County will be 'abandoned land' by 2007, as happened in the 1930s.
- The primary producer, the farmer, needs to derive more value from the food chain. If, as farmers claim, the UK has the most varied and well-cared for stock in the world, the best market for food in Europe but the worst prices then something is seriously wrong.
- Foot and Mouth Disease has had a major impact on all livestock farmers in the County whether or not they suffered an outbreak, had their stock culled to prevent further spread or been restricted in movement. Indeed it can be argued that, at least financially, those who have had stock culled are better off. They however have had the greatest blow to their morale and job satisfaction and in many cases have lost their life's work.
- 11% of the County is under woodland but the establishment of new forests and the management of neglected woodlands is uneconomic at current prices and levels of support. Consequently small saw mills in the County have closed and we are importing more timber. There is a real need to solve the problem of uneconomic thinning of existing woodlands, essential for producing forest products of value. Environmentally trees act as visual and sound barriers and enhance the landscape, particularly in areas such as the Forest of Dean.
- Only a small part of the agricultural industry is concerned with adding value.
- The decreases in interest rates have been of some benefit although the level of debt has increased.
- The high cost of housing in some rural areas, particularly the Cotswolds, creates a shortage in affordable or social housing.

- Diversification into tourism is not always viable in present economic circumstances. The position is made worse by the failure of Government Ministries and national and regional agencies to recognise Tourism as a real industry, which if supported and developed could bring major economic benefits.

Consumer Confidence

- BSE, TB and scares over antibiotic supplements to feeds, particularly in poultry farming, did great damage to consumer confidence.
- Consumers, perversely, do not seem to care that the high standards of livestock care legislation, which are strictly applied in the UK, are not applied to imports. The majority of consumers buy based on price, and no other factor, although an increasing number appear to believe that Farmers Markets offer good value for good food.
- Generally the consumer has very little understanding of agricultural production and therefore lacks the confidence that would result from more knowledge.
- Farmers must take an increased responsibility for their own destiny but despite the efforts of Business Link Gloucestershire, many still do not see the need to develop the skills, infrastructure and networking to enable them to understand and deliver the needs of an integrated food chain.
- Traditionally, food has been ‘bought’ not ‘sold’ in the UK. Primary producers have therefore not recognised the need to meet the needs and expectations of their customers and to influence what these should be, in other words to market their product.

International

- The weakness of the Euro makes exporting harder and importing easier.
- There is an export ban on UK beef to some countries, particularly France.
- The reform of the Common Agricultural Policy (CAP) is delayed. What the UK wants needs to be agreed by other member countries with different agriculture industries and agendas.

Policy

- The Government seems to wish agricultural reform to happen but backs away from developing clear policies that would provide the framework to allow business planning by farmers to take place. The Curry Report on ‘The Future of Farming and Food’ offers an opportunity to rectify this.
- Favourable reform of the Common Agriculture Policy will be opposed by less receptive states unless the UK consults widely across Europe and works extremely hard to achieve its objectives.
- The Government appears determined to make British agriculture un-competitive by applying rigorous rules to UK food production but setting a lower standard for imports.
- DEFRA, The Environment Agency, The Countryside Agency, South West Regional Development Agency and The Food Standards Agency (to list but a few) are all Government funded, all have their own policies and strategies which come together on the doorstep of the farmer. When combined with the European Union rules and Local Government policies the effect is suffocating.
- Present policy still treats Foot and Mouth Disease as a short-term problem and fails to recognise the medium and long-term impacts.
- The rules governing Areas of Outstanding Natural Beauty (AONB) and Environmentally Sensitive Areas (ESAs) can act as a constraint as well as a benefit.
- New waste legislation could have a disastrous impact on much animal farming.
- The implications of new ‘nitrate vulnerable zones’ are not clearly understood by all farmers.
- Local Planning Authorities for whatever reason simply do not process applications quickly enough. Although some proposed developments are not agreed, 83% of planning applications are eventually approved. However the delays imposed by the process often mean that the opportunity has been lost.

Innovation

- The average age of the agricultural workforce is high. There is insufficient mobility and thus a lack of opportunities for young people to enter the industry.
- Many farmers are entrepreneurs; they can innovate but lack confidence and sometimes training to proceed.
- Market forces often mean that a good idea is copied so that a niche market is quickly swamped and all involved lose money.

THE SOLUTIONS

The Attitude of Farmers

- Farmers need to be persuaded that there is a financially viable future for them, producing food and other products and in doing this they have the support of the Government, the food supply chain and the public. The adoption by the Government of all the recommendations of the Curry Report would send a powerful and encouraging, but challenging, message to farmers.

Policy

- The Government should adopt and implement The Curry Report in its entirety. Government Strategy would then make clear, in terms that can be understood by farmers, the policies it will pursue on food supply (including food safety and animal welfare), exports, non food products and diversification. Until and unless this happens agricultural reform simply will not happen.
- The Government must 'lubricate' agricultural reform by providing funding to help older farmers with small farms leave the industry, fund innovation, reduce bureaucracy and establishing a process to enable diversification to happen rapidly.
- The Government must eradicate the muddle caused by competing Ministries and Agencies such as DEFRA, The Environment Agency, The Countryside Agency, South West Regional Development Agency, The Food Standards Agency and the Small Business Service/Business Link.
- The Government needs to delegate action to County level where the variations in circumstances should be understood, the link to the County Structure Plan and District Local Plans could be made and the national policies brought together. The Government should however demand 'joined up' County plans that support agricultural reform in return for funding.
- The current policy of treating FMD as a short-term issue needs to be expanded to recognise and deal with the medium and long term impacts.

Marketing

- Traditionally the majority of farmers seem to have seen no need to market their produce. This attitude must change; farmers need to become influentially active in the food supply chain through more effective routes of communication to develop a greater understanding of consumers and their needs and/or joining large co-operatives that can do this for them.
- Direct selling contracts between farmers and supermarkets and/or large food processors tend to allow the purchaser to determine price (for example the dairies telling dairy farmers what price they will pay next month under an existing contract involves no negotiation or discussion). Three or four huge countrywide co-operatives would force the major purchasers to negotiate seriously and might lead to the producer getting prices that made them profitable.
- Producers and food groups need to make caterers, retailers and processors both within the County and outside more aware of Gloucestershire products.
- Diversified farm enterprises such as farm shops are businesses, which require both general and specific advice. Where they are new start-ups they should be encouraged to use the well-tried business start-up process.
- The current enthusiasm for 'farmers markets' needs to be encouraged and sustained.
- Quality assurance and traceability systems back to primary production are becoming increasingly important and need to become common practice quickly.
- Links between growers and users of forest products need to be promoted on a local and regional basis to enable small lots of timber to be aggregated into economic parcels acceptable to industrial users, thus bringing scattered small woodlands into the supply chain.

Competitive Production

- Consumers can buy cheaper food, produced overseas to lower standards than those imposed on UK farmers. The Government, across all departments and in particular DEFRA, DOH and DFES, the NFU, CLA and other organisations need a far more positive strategy to emphasise the benefits of UK products, so that more consumers change their buying habits.
- Research into new technologies, productivity and efficiency is vital to increasing competitivity. The work done in the County's and the Region's agricultural colleges, universities and research establishments, needs to be relevant to agriculture in the County, and be accessible to farmers.
- Adding value through on-farm processing will, in some circumstances, be a most effective way of increasing profitability.
- The laws on labelling need to be re-thought and clarified so that the consumer can immediately recognise what has been produced entirely in UK and what has merely been processed in UK.
- The use of portable sawmills and other processing plant to add value to wood within a forest need to be promoted and supported.

Business Development

- Farms are businesses that need the same basic skills as any other business, namely business planning, financial monitoring, marketing and market intelligence.

- Farmers, perhaps more than other businesses, can learn from best practice of others. Networks such as those that can be developed under the Gloucestershire Agriculture and Rural Development Programme should be encouraged with an aim of reaching 50% of the County's farmers over the next 5 years.
- There is a need to develop a simple diagnostic tool to identify what steps are likely to have the most beneficial effect on a business.

Education

- Farmers need to accept that the public, who are the consumers, have little understanding and many misconceptions about farming. It is the industry's fault that this is so and a farmer led programme, supported by other national, regional and local agencies needs to be developed and implemented. Such a programme should recognise that:
  - Public access is an opportunity to educate the public, not a threat to the business.
  - School children need to be better informed about farming through work experience, education business partnerships and farm visits.
  - Key influencers, particularly national and local politicians, local authority officers, need to be better informed on farming issues through seeing not reading.

Diversification

- Diversification into other food products including organic (it is claimed that 70% of organic produce is imported) may result in increased profitability for some farmers but impartial information on trends, future markets and costs needs to be more readily available to allow sound business decisions to be made.
- Diversification into non-food products such as energy crops, carbon, timber, compost and thatch may offer more profitability and wider benefits ('green' fuel) but often requires substantial capital, training, time and an assured market. (SWEB withdrew from the biomass scheme in the South West halfway through the 10-year period). There is a need for DEFRA and the RDA to underpin such diversification and generate and sustain the markets.
- Diversification into tourism needs to be sustained by an effective lobby of Government to ensure they recognise, support and enhance tourism as an industry not a part time hobby.
- Redundant farm buildings represent a resource that is under-utilised. There needs to be a pro-active approach with better liaison between the farming community and Local Planning Authorities to their development into income earning units, whether as business premises or tourist accommodation. They need to be seen as 'brownfield' sites although their development must be based on sustainable principles for the location. The present VAT rules whereby conversion attracts VAT and new build does not, need to be harmonised.
- There will be some cases where new small developments would be environmentally acceptable, would boost rural economies, and provide much needed capital into the farm and, if they included affordable housing, meet social needs. There is a need for a pro-active approach to identifying such opportunities whilst recognising that residential development in the countryside, outside settlements, is contrary to current planning policy.
- To overcome the lack of social housing in many areas landowners should be pro-active in discussing local housing needs with their Planning or Housing Strategy Officers to develop mutually acceptable solutions.
- Only 50% of farmers today farm full time. There is a need to ensure farmers, who wish, can acquire different skills to increase their income and allow them to continue farming part time.

Maintaining and Improving the Environment

- The South West Regional Development Agency describes in its strategy as a 'driving force' "ensuring that the regions unique cultural and environmental assets are used to attract and develop business potential". There is a need for the early preparation of an integrated land use strategy relevant to Gloucestershire, which fits into a regional strategy.
- Whilst the concept of 'protected areas' such as AONB and ESAs may be seen to be unfair, they are widespread in Gloucestershire and mean that farmers get payments to maintain the environment. These need to be used to the full.
- There is a need for the County Council to implement its bio-diversity action plan.

- There is a lack of integrated planning, except on large estates. There needs to be a mechanism, possibly as part of local plans but also inspired by DEFRA policies, whereby integrated planning, including timber is encouraged.

- Too few Gloucestershire farmers are profiting from good environmental practices.

Finance
- There is a need for advice, which is easily accessible, on all aspects of funding and grants.

STRATEGIC OBJECTIVES

From the discussion above it is deduced that the Strategic Objectives in an Agricultural Strategy for Gloucestershire should be to:
- Help the agricultural sector in Gloucestershire manage the inevitable changes over the next decade successfully so that it is competitive, forward looking and profitable.
- Assist the agricultural sector in Gloucestershire market itself so that customers are more aware of agricultural issues and more local produce is used locally.
- Ensure that those working in the land-based sector in Gloucestershire have the skills needed to compete in world markets.
- Increase the recognition of the role that the farmer and land manager does and can play in maintaining a diverse countryside and in sustaining the wider rural economy.
- Make diversification a reality rather than a theory.

ACHIEVING THE OBJECTIVES

Objective 1. To help the agricultural sector in Gloucestershire manage the inevitable changes over the next decade successfully so that it is competitive, forward looking and profitable. This could be achieved by:
- Gloucestershire MPs (particularly those on the Select Committee), DEFRA, the RDA, Countryside Agency, The Environment Agency and NFU all persuading the Government to:
  - Adopt the recommendations of the Policy Commission on Farming and Food (The Curry Report) in full.
  - Develop and publicise clear policies on food supply, agricultural exports, non-food products and diversification.
  - 'Lubricate' the process.
  - Eradicate the muddle.
- The Gloucestershire Branch of the NFU, CLA Gloucestershire, Business Link Gloucestershire, Tenant Farmers Association, Royal Agricultural College and Hartpury College all adopting a programme which promotes a competitive, forward looking attitude in farmers. Whatever any other agency does unless farmers themselves are prepared to seize the opportunities presented then the whole strategy will fail.
- The SW RDA persuading the Government successfully that funding is needed to alleviate the medium and long-term impacts of FMD.
- The SW RDA and SW DEFRA demonstrating to farmers the benefits of focusing on quality, adding value, marketing and collaboration in bringing products to consumers.
- The SW DEFRA office adopting a 'can do' attitude and making the ERDP far more effective than it has been to date in helping to promote change.
- Forestry and Timber Association working to improve the economic climate for woodland management by influencing Government and other agencies and pressing for realistic levels of grants or other fiscal support.
- Gloucestershire First making much more rapid and effective progress than has been achieved to date with 'Rural Gloucestershire – The Future' and thus promoting awareness in Local Government members and officials of policies that could help to achieve a strong agricultural sector in the County.
- The Gloucestershire County Bidding Group (now being managed by the LGA) ensuring a process exists to ensure that every funding opportunity for Gloucestershire is identified and accessed effectively.

Objective 2. To assist the agricultural sector in Gloucestershire market itself so that customers are more aware of agricultural issues and more local produce is used locally. This could be achieved by:
- DEFRA, in conjunction with the NFU and TGA, developing a positive marketing strategy to persuade the consumer to change their habits and buy British products because they are better than any other.
- The Gloucestershire Branch of the NFU taking a real lead in:
  - Persuading farmers that they either need to market (not simply sell) their products or join a large co-operative that will do it for them and is large enough to bargain effectively with the supermarkets.
  - Helping farmers to understand the needs of their customers and develop traceabilty.
  - Developing and implementing a farmer led programme, supported by other national, regional and local agencies to:

    - Make farmers understand that public access is an opportunity to educate the public, not a threat to the business.
    - Ensure that school children are better informed about farming through work experience, education business partnerships and farm visits.
    - Engage key influencers, particularly national and local politicians, local authority officers, and inform them on farming issues through seeing not reading.
- The County Council, District Councils and NFU working in partnership to establish a replacement livestock market in Gloucestershire as soon as possible.
- Gloucestershire Taste of the West making caterers, retailers and processors both within the County and outside aware of Gloucestershire products not occasionally but constantly and discovering when they do not use them why.
- The Gloucestershire District Councils, LEA and the NHS Trusts adopting a policy of local sourcing of food, based on the experience of South Gloucestershire.
- Business Link Gloucestershire developing a programme to support the expansion of Farmers Markets, both existing and new and farm shops.
- The Forestry and Timber Association promoting links between growers and users of forest products in Gloucestershire.

Objective 3. To ensure that those working in the agricultural sector in Gloucestershire have the skills and innovation needed to compete profitably in world markets. This could be achieved by:

- Business Link Gloucestershire ensuring that:
    - The Gloucestershire Agricultural and Rural Development (GARD) scheme is a success and that a significant number of the County's farmers are involved as quickly as possible.
    - Promoting the provision and funding by the Learning and Skills Council Gloucestershire (LSC) of county based training for young people in traditional skills.
    - There is an effective signposting service to training advice that does not have a vested interest (many courses are too long and too expensive and are designed to benefit only the provider and not the industry).
    - Persuade the LSC to obtain adequate information to define the skills requirement and to demand that training providers (Colleges, private sector and farming associations) organise training that is accessible to the working farmer (on the farm, discussion groups, mobile).
- DEFRA encouraging effective use of the Vocational Training Scheme in the English Rural Development Plan (ERDP) to provide subsidised training for young, mature and older farmers for periods at the RAC, Hartpury and Training Midwest.

Objective 4. To increase the recognition of the role which the farmer and land manager does and can play in maintaining a diverse countryside and in sustaining the wider rural economy. This could be achieved by:

- Gloucestershire County Council:
    - Developing in conjunction with the RDA an integrated land use strategy relevant to Gloucestershire.
    - Retaining and promoting the County Council 9000 acres estate as a model for farmers and other key influencers and policy makers of what can be achieved.
    - Delivering its bio-diversity action plan.
- The Environment Agency promoting widely within Gloucestershire its publication 'Best Farming Practices: Profiting from a Good Environment'.
- The Environment Agency, English Nature, The Wildlife Trust, Countryside Agency, the Forestry and Timber Association and the Farming & Wildlife Advisory Group:
    - Advising farmers on best practice opportunities for environmental protection and enhancement.
- The Forestry and Timber Association increasing its profile amongst landowners in Gloucestershire to promote the introduction of new woodland or the restoration of neglected woodland economically.

Objective 5. To make diversification a reality rather than a theory. This could be achieved by:

- Gloucestershire's and the Region's agricultural colleges, universities and research establishments, particularly the RAC, Hartpury and the Food Research Agency ensuring that their research into new technologies, productivity and efficiency focuses on increasing competitivity, is relevant to the needs of the agricultural industry locally and is easily accessible to the farmer.
- Business Link Gloucestershire
    - Developing a simple diagnostic tool to identify what steps are likely to have the most beneficial effect on a business particularly the introduction of on-farm processing.
    - Providing a gateway into impartial information on trends, future markets and costs of diversification into other food products to allow sound business decisions to be made.

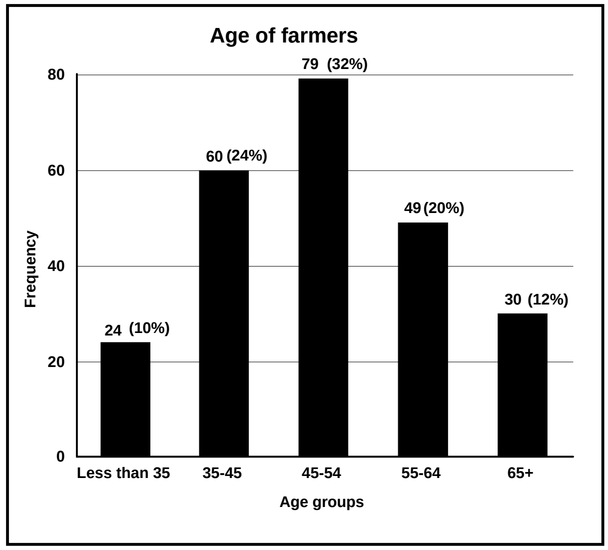
- CLA Gloucestershire persuading all its members in Gloucestershire with tenants to encourage these tenants to examine diversification so that the tenant gets sufficient benefit to make it worthwhile. The attitude of The Crown Estates might be an exemplar.
- DEFRA and the RDA encouraging and underpinning diversification into non-food products such as timber, energy crops, carbon, compost and thatch in Gloucestershire.
- The Countryside Agency, RDA and Gloucestershire County Council persuading the Government to recognise tourism as a real industry which, if supported and developed, will bring major economic benefits.
- SWRDA using the Redundant Rural Building Grant to develop redundant farm buildings in Gloucestershire for commercial use.
- Gloucestershire County Council and the County Local Authorities giving positive support to the diversification of the rural economy, particularly a proactive approach to planning that will boost the rural economy, particularly the growth of Rural Business Centres.

Results of the Agricultural Survey

(This survey took place in March 2000. 882 farms and associated businesses were asked to take part, 245 (nearly 30%) did so.)

Age

The majority 188 (76%) of respondents were aged between 35 and 64. The largest percentage (32%)of respondents were in the 45-54 age group.

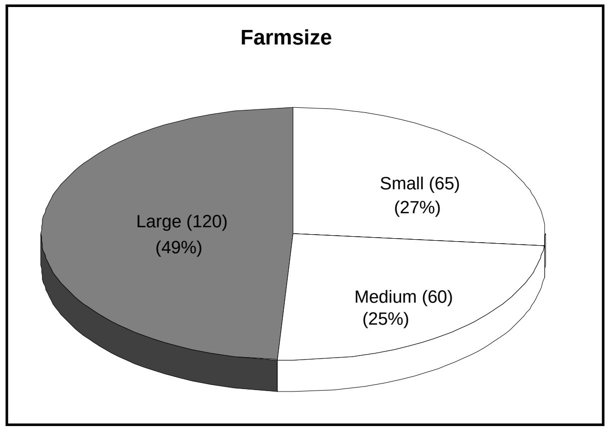


3 Farm Size

Farms have been arranged into 3 sizebands.
Small <46ha
Medium 46-100ha
Large >100ha

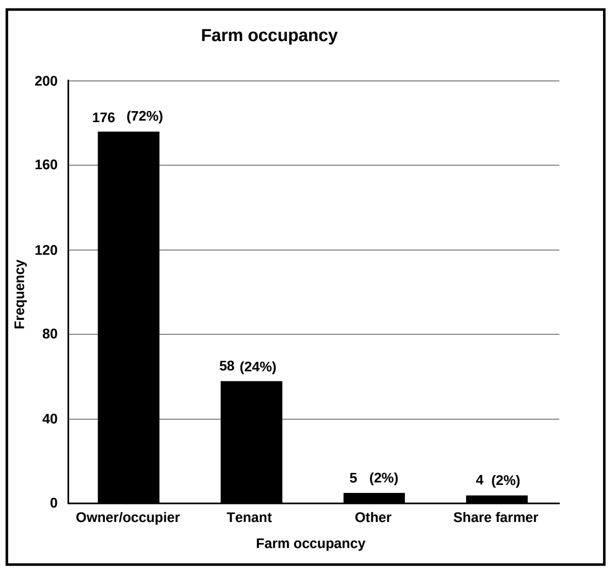
Almost half the respondents were in the large farm category with the remaining half more or less equally split between the small and medium sized farms.

When comparing size with district the figures are too small for an accurate picture but the large size farms do appear to be slightly more dominant in the Cotswold district.



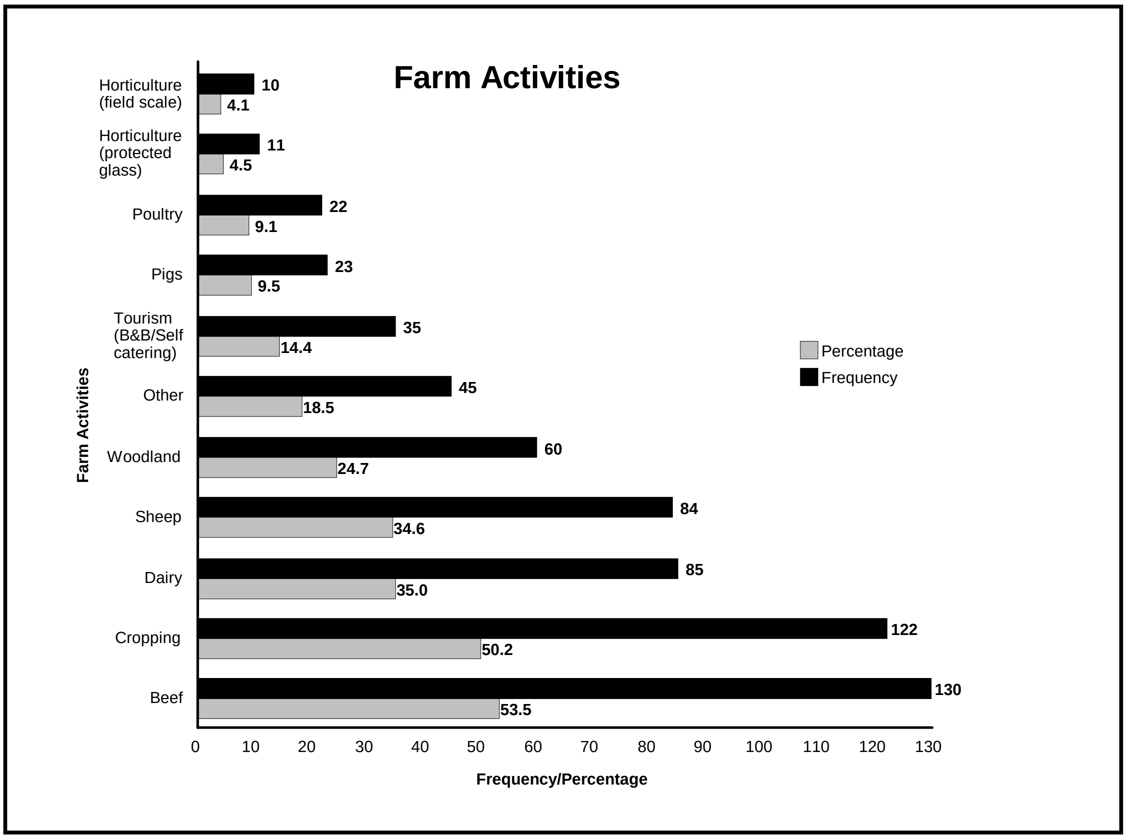
4 Farm Occupancy

Farm occupancy is dominated by the Owner/occupier category with 176 (72%) of respondents comprising this category.



5 Farm activities

The graph below shows the response to the type of farm activities undertaken in the county and reflects that respondents could tick as many activities as were applicable. The most common farm activities are beef farming with 130 (54%) respondents, cropping with 122 (50%) respondents and dairy farming with 85 (35%) respondents. Nearly 45 (20%) respondents quoted Other activities and half of these related to equestrian followed by contracting activities. This picture is similar to the rest of the south west region.



6 Sale of farm product

Nearly a third of respondents numbering 68 (28%) sold between 51 and 100% of their produce through a dealer or agricultural merchant and a further third amounting to 65 (27%) respondents sold the same proportion through a cattle market. Very few respondents sold produce through a farm shop.

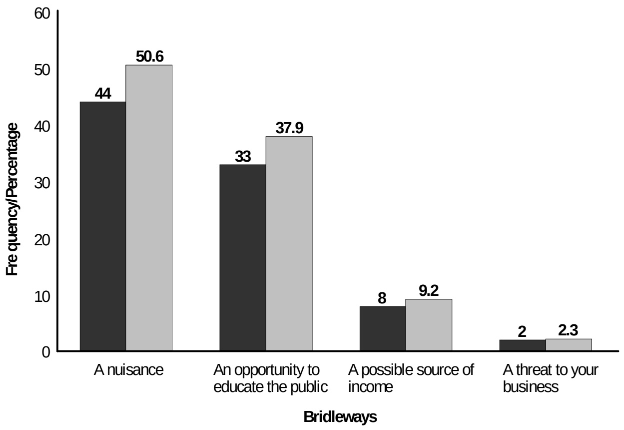
% product	Cattle Market	Co-operative	Farm Shop	Dealer/Agric Merchant	Public	Contract
0-10	14 (6%)	2 (1%)	4 (2%)	6 (2%)	18 (7%)	7 (3%)
11-50	34 (14%)	12 (5%)	2 (1%)	26 (11%)	7 (3%)	13 (5%)
51-100	65 (27%)	34 (14%)	3 (1%)	68 (28%)	11 (5%)	44 (18%)

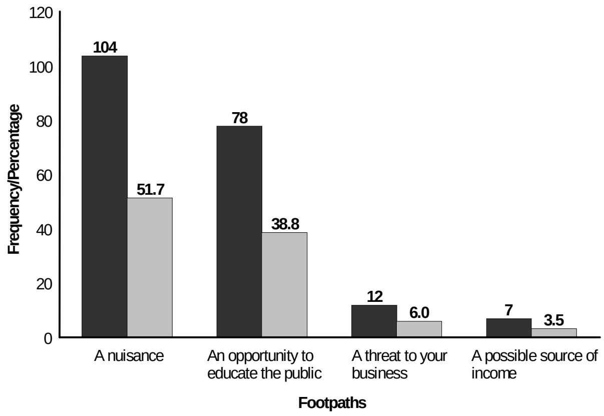
7/8 Bridleways/Footpaths

Some 92 (38%) respondents had a bridleway running across their land and 213 (88%) said they had a footpath running across their land.

The above respondents were asked about usage of the respective bridleways/footpaths. A total of 67 (78%) respondents said the bridleways were used regularly and a further 17 (20%) said occasionally. Usage of footpaths was higher with 111 (54%) respondents stating a regular use and 67 (33%) occasional use.

When asked about the value of these bridleways/footpaths over 50% of respondents as shown in the graphs below saw them as a nuisance, however, nearly 40% of respondents saw them as an opportunity to educate the public.

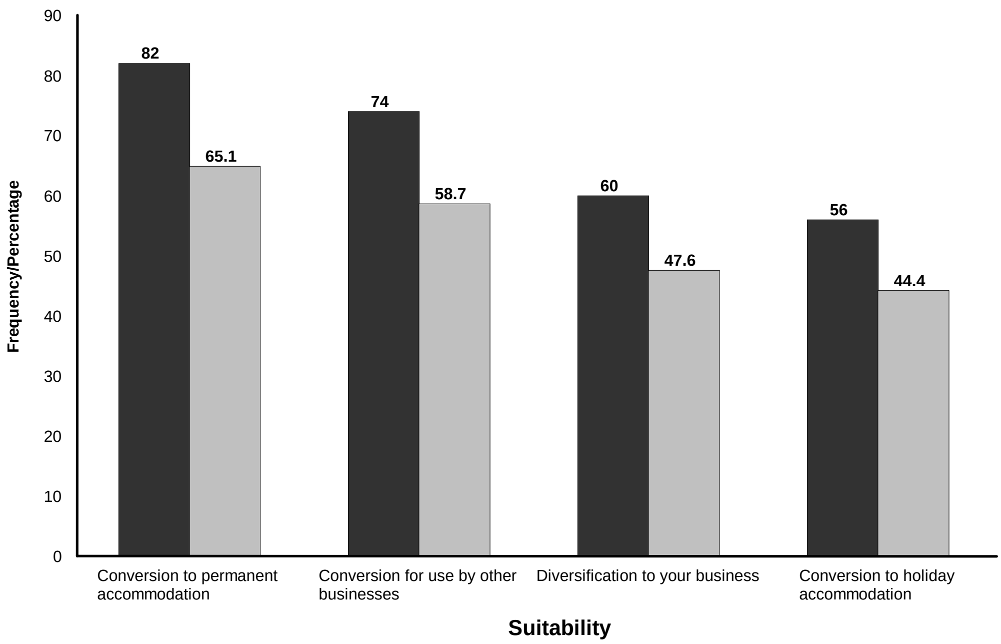




9 Redundant or potentially redundant agricultural buildings

Some 133 (55%) respondents said they had redundant buildings. Those respondents were then asked about the suitability of such buildings for other uses and their response is shown in the graph below. The two most popular options appear to be 82 (65%) respondents selecting suitability for conversion to permanent buildings and 74 (59%) selecting suitability for conversion for use by other businesses.

When asked if they would wish to see any of the above situations regarding their redundant buildings happen or not, 100 (76%) said they would.



10 Planning Consent

The table below shows the response by district as to whether planning consent had been discouraged or refused. Nearly three quarters of those respondents that answered replied that they hadn't been discouraged or refused planning consent, but this also includes any that had not asked. 40 (16%) of those that asked had been discouraged or refused.

Discouraged /refused	Cotswolds	Forest	Gloucester	Stroud	Tewkesbury	Total*
Yes	12	8	0	7	4	40 (16%)
No	71	27	3	38	15	182 (74%)

* The total figure includes responses to that question; but where district could not be identified.

11 Availability of grant funding

Only 55 (24%) respondents said they were aware of the availability of any grant funding from local Councils towards the renovation or conversion of residential properties compared with 173 (76%) who were not aware.

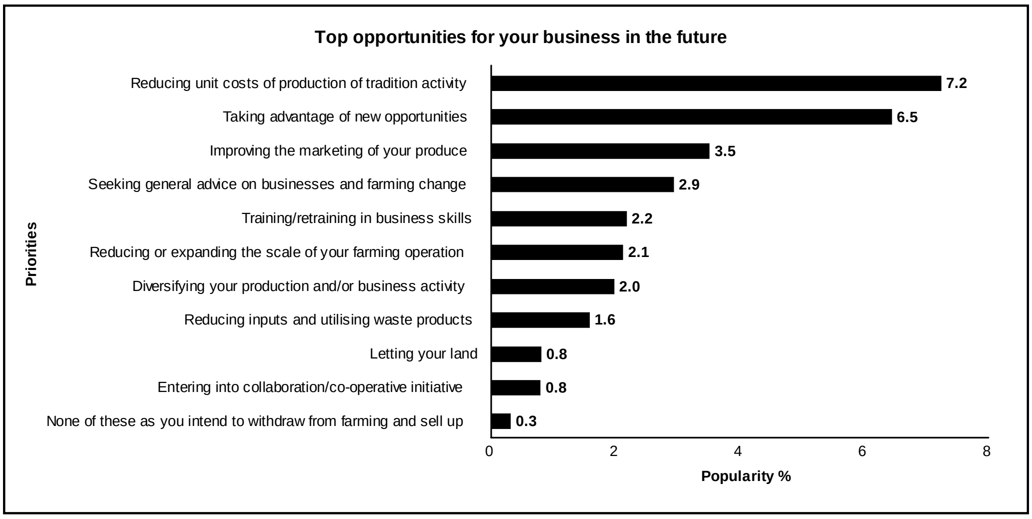
12 Business Link Rural Property Database

An overwhelming 194 (97%) of respondents said they were not on the database.

13 The top opportunities for your business in the future

Respondents were asked to nominate and rank what they considered the top three opportunities for the future of their business from a list of 11 possibles. The results are shown in the graph below. The most popular opportunity was 'Reducing unit costs of production of traditional activity' with 7% ranking it as their top choice. This was followed by 6.5% ranking 'Taking advantage of new opportunities' as their second choice and 4% ranking 'Improving the marketing of your produce' as the third most popular choice.

The least popular choices appeared to be 'Entering into collaborative/co-operative initiative' and 'Letting your land'

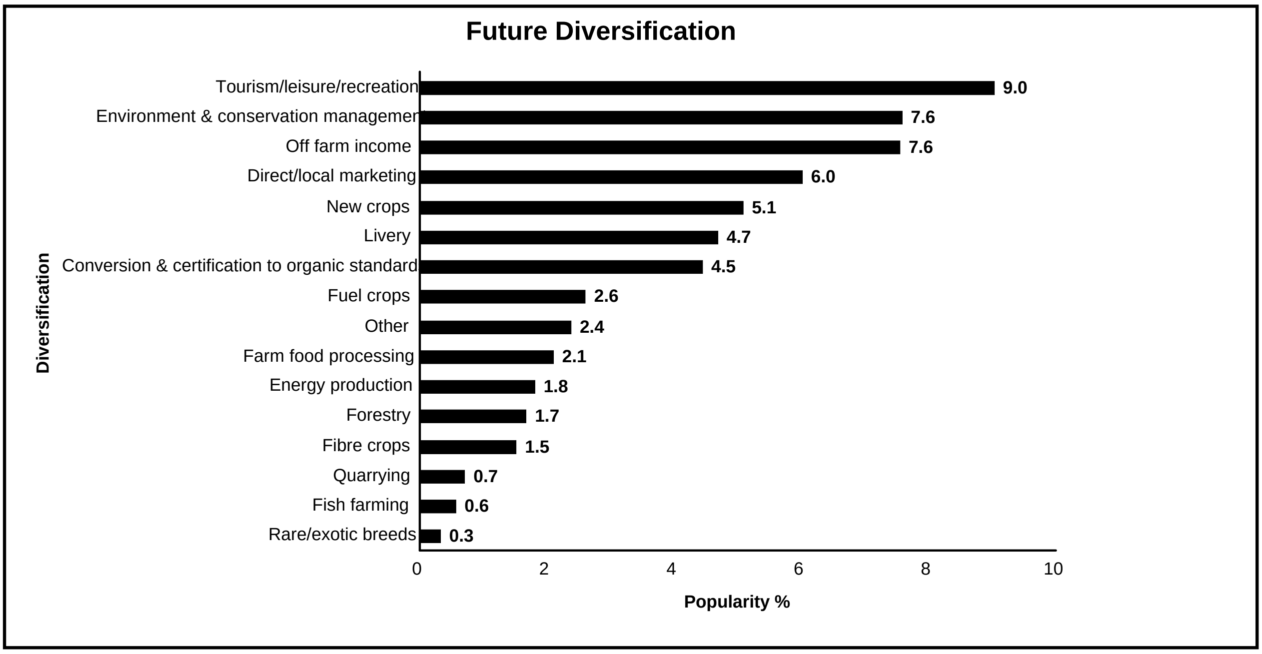


14 Diversification

135 (57%) saw future diversification as a possibility compared with 103 (44%) who didn't.

Those that saw diversification as a future possibility were asked to nominate and rank the top 5 diversification options out of 16 possibles. The results are shown below.
The most popular option was 'Tourism/leisure/recreation' with 9% ranking as their first choice followed by 8% ranking the next two options as equal second choice. They were 'Environment & conservation management' and 'Off-farm income'.

The least popular choices involved 'Rare/exotic breeds' and 'Fish farming'.



15 Retirement

Respondents were asked to select from a choice of possibilities regarding the future of the farm on their retirement. The results are shown below.

Of those that answered, the majority, comprising some 117 (57%) respondents expect their children to take over the farm. A sizeable 44 (21%) however, said they would sell up.

When correlated with farm size as shown in the table below a good proportion of the larger farms are expected to be taken over by the children, nearly 40% (17%) of the larger farm category however, said they would sell up.

Size	Children take over farm	Close relative take over farm	Sell-up, children not interested	Sell-up, would not recommend to farming	Sell-up, No natural successors	Other	Total
Small (<46ha)	17	2	8	2	8	15	**52**
Medium (46-100ha)	29	4	5	2	2	7	**49**
Large (>100ha)	71	2	5	6	6	16	**106**
Total	**117**	**8**	**18**	**10**	**16**	**38**	**207**

16 Views for the future

From the table below it is evident that the consensus of opinion was common to a number of respondents regarding some of the statements.

A high proportion 177 (74%) agreed that ‘the local community will be eroded if farming continues to decline’. 191 (81%) respondents agreed that ‘young people are moving away from farming as a career choice’, this is supported by 146 (63%) respondents disagreeing that ‘farming is a good career for people to move into’

Some 220 (92%) respondents felt that ‘agriculture is moving towards becoming a complex business’

Statement	Agree	Unsure	Disagree
As in the past, farming will adapt to economic difficulties and survive	122 (52%)	99 (42%)	16 (7%)
The local community will be eroded if farming continues to decline	177 (74%)	38 (16%)	24 (10%)
The government will ensure that farming survives	6 (3%)	89 (37%)	143 (60%)
The farming sector will struggle to keep up with the demands of consumers for higher quality and lower prices	158 (69%)	49 (21%)	23 (10%)
Farming is still a profitable business with a future	33 (14%)	114 (49%)	85 (37%)
Agriculture is moving away from being ‘a way of life’ towards a complex business dominated by rules and regulations	220 (92%)	10 (4%)	8 (3%)
Agriculture will continue to decline	124 (52%)	89 (37%)	27 (11%)
Farming is no different from any other sector, it has its ups and downs	124 (53%)	66 (28%)	44 (19%)
Farming is a good career for people to move into	14 (6%)	72 (31%)	146 (63%)
Young people are moving away from farming as a career choice	191 (81%)	23 (10%)	23 (10%)

17 Support

The figures in the following table show that the majority of respondents do not get support from these three schemes.

Scheme	Yes	No
Farm Woodland Scheme	58 (24%)	181 (76%)
Countryside Stewardship Scheme	19 (8%)	220 (92%)
Environmental Sensitive Area	58 (24%)	181 (76%)

18 To what extent in % terms is business sustained by mortgage, bank loan or other forms of loans

Although the majority amounting to 103 (42%) respondents have less than 10% of their business supported by a loan, nearly 30% have more than 20% of their businesses supported by loans.

Percentage of business	Respondents
0-9%	103 (42%)
10-19%	21 (9%)
20-49%	43 (18%)
50-99%	25 (10%)
100%	6 (2%)

19 Current state of farm commercial viability

The table below shows that nearly 50% of respondents felt that the current state of their farm was in a "poor" state of viability and a further quarter felt that their farm viability was in an "awful" state.

State	Respondents
Good	14 (6%)
OK	48 (20%)
Poor	116 (49%)
Awful	58 (25%)

20 Jobs sustained on the farm or in associated activities

By far the overwhelming majority of 192 (78%) respondents had between 0-4 full time employees. Only 17 (7%) of respondents had between 5-9 full time employees.

The part time employment picture is similar with most respondents amounting to 143 (58%) having between 0-4 employees.

21 Capital investment over the next 3 years in machinery of fixed equipment

There was more or less an even break in the response to this question with 109 (47%) respondents saying they do expect to invest and 124 (54%) not expecting to invest.

Amount of investment

Nearest £5K	Respondents
0-9£K	13 (5%)
10-49£K	56 (23%)
50-99£K	24 (10%)
100-500£K	15 (6%)
500£K	1 (0.4%)

Of those that do expect to invest some 56 (23%) invest between 10 and £49K.