

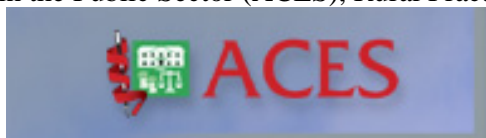
**County Farms and Rural Restructuring:
a review of the county farms estate in England and Wales**

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Glossary

ALT	Agricultural Land Tribunal
ACC	The Association of County Councils
ACES	Association of Chief Estates Officers and Property Managers in Local Government - The Rural Practice Branch
CAAV	Central Association of Agricultural Valuers
CF	County farms
CFE	County farms estate
CIPFA	The Chartered Institute of Public Finance and Accountancy
CUA	County and Unitary Authority
Defra	Department of Environment Food and Rural Affairs
ha	Hectares
IPD	The Investment Property Databank
MAFF	Ministry of Agriculture, Fisheries and Food
NFU	National Farmers Union
SS	Statutory smallholdings
TRIG	Tenancy Reform Industry Group

1 Introduction

The 1892 Small Holdings Act provided opportunity for farm workers to occupy and purchase small holdings from county councils and unitary authorities (CUA). The purpose of the Act was to address rural social issues, most notably the loss of small farmers and the plight of the agricultural labourer. There was also a widely held political desire to '*bring about a wider distribution of land among the people*' (Wise Committee Report, 1966: 8). Individual holdings were generally limited to less than 20 hectares (ha) and many were available as part-time holdings (Wise Committee Report, 1966). By limiting the size of holdings, the service provided a large number of small holdings, thus leading to their classification as 'statutory smallholdings (SS)'¹. However, the Act failed to significantly increase rates of owner occupation and further legislative developments led to the ratification of the 1908 Small Holdings and Allotments Act. The 1908 Act provided CUA with a statutory duty to facilitate land for persons, which they could occupy and cultivate themselves (Small Holdings and Allotments Act, 1908). An underlying political desire to facilitate an increase in owner occupancy of agricultural land had contributed to both the 1892 and 1908 Acts, with letting becoming the more favoured method of occupation (Wise Committee Report, 1966). Due to the dominance of land occupancy through tenancy agreements, the 1908 Act failed in its own right to significantly encourage owner occupancy of land. However, it did provide an opportunity for new entrants to establish a farming business. For this purpose, SS were seen as a 'farming ladder' that new entrants could utilise, to establish and progress their agricultural business. The concept of SS was seen as a manner of, amongst other social considerations, increasing owner occupation of land. Yet, the provision of SS failed to do this and, paradoxically, they became an integral part of the tenanted sector.

In 1966, the Departmental Committee of Inquiry into SS (The Wise Committee) published its findings on a review and report on the present and future of SS. One

¹ The initial name given to the holdings provided by CUA was 'statutory smallholdings' and the small holding was defined as '*small farms that were capable of being worked by the occupier and their family and without hired labour*' (Wise Committee Report, 1966: 63). The Northfield Report (1979: 203) concluded that the name was '*misleading in present day circumstances*' and proposed the title be changed to '*county holdings*'. This name has subsequently changed again to the present 'county farms'. The change would appear relevant as Holloway (2000) defined modern smallholdings as '*holdings smaller than a farm*'. However, the historical name given to the service represents a temporal value placed upon that service. For this reason, the name given to the service within the text will be that used during the period being discussed.

significant finding of the Wise Committee related to the perceived position of the SS within the tenanted sector and the facility it offered to new entrants. The findings of the Wise Committee concluded that SS should be viewed as a 'gateway' into farming, rather than as part of the farming ladder (Wise Committee Report, 1966: 142). Changing the objectives of the SS was seen as an instrument to encourage ambitious tenants, who possessed technical knowledge, practical experience and managerial ability, into the industry. The failure of legislation relating to SS was noted by the Wise Committee and was subsequently addressed within the 1970 Agriculture Act. Part III of this Act provided three legislative amendments that have helped to re-define the role of the modern county farms estate (CFE) and the level of service that CUA are obliged to supply. These amendments are:

- CUA must show a long-term commitment to create more fully commercial holdings;
- That CUA need 'to make it their general aim to provide opportunities for persons to be farmers'; and
- Revoking the ministerial veto on the sale of land from the CFE.

The need to create fully commercial holdings has been addressed by the amalgamation of smaller farms and part-time holdings. This has helped to create holdings that have greater economic viability, but it has reduced the overall number of holdings within the CFE. The second stipulation of the 1970 Act has caused ambiguity towards the legal requirements of CUA to provide county farms (CF). In particular, the wording of this statement has created legal uncertainty in terms of the obligation of CUA and its '*statutory duty to provide smallholdings*' and has allowed the disposal of property from the CFE (TRIG, 2007: 70 - 71). The ministerial veto on the sale of CF land was viewed as a 'safety net' system to restrict the sell-off of CF land by CUA (Northfield Report, 1979).² Its removal has allowed CUA to act independently over issues of land sales and according to their own best interests.

While occupying a unique position within British agriculture, little research has been conducted on the CFE, apart from the Wise Committee Report (1966) and the Northfield Report (1979). Annual reports are made to Parliament concerning the CFE within England and the Chartered Institute of Public Finance and Accountancy

² The Northfield Report (1979) looked at the acquisition and occupancy of agricultural land and looked at CF as part of this research remit. The timing of the research allowed the report to observe the influence of the 1970 Agriculture Act on the CFE. One of the outcomes of the Northfield Report (1979) was to propose the reinstatement of the ministerial veto on the sale of land from the CFE, although this has never been implemented.

(CIPFA) also publish annual data for the CFE in England and Wales as the facility uses public funds. Despite this, there is very little known about the present extent and structure of the CFE across England and Wales.

The aim of this working paper is to examine available secondary data and to assess the current status of the CFE within England and Wales. The report will consider the following:

- The position of CF in relation to the tenanted sector and ownership of agricultural land;
- The present structure of the CFE, including the present typology of the CFE and its financial performance; and
- The range of services other than agriculture offered by the CFE.

The review argues that the CFE offers a service beyond that of simple agricultural production, including their use as wider economic, educational and environmental resources. The use of alternative services on the CFE will be evaluated within section four. The paper will also be used to identify areas where knowledge is lacking in relation to the CFE in order to develop areas that require further research. The remainder of the report will be structured into five sections. The following three sections will deal, in turn, with the position of CF in relation to landownership, the present structure of the CFE and the non-agricultural services provided. The final section then evaluates the main findings and recommends areas in need of further research.

2 Agricultural land tenure in England and Wales

In 2001, the British Government admitted officially that the Land Registry did not possess information about the total acreage of England and Wales (Cahill, 2002). Between 1916³ and 2006, the estimated area of agricultural land within England and Wales fell by around 2.15 million ha to 10.8 million ha (MAFF, 1968; Defra, 2007a) (Table 2.1.). This loss of agricultural land can be attributed to urban development (Newby *et al.* 1978), an increase in land occupied by government agencies, especially the Forestry Commission (Massey and Catalano, 1978), and changes in calculation techniques (MAFF, 1968). The area of land within the tenanted sector in Wales is difficult to define. The Welsh Assembly has removed questions specific to the tenanted land area from the Agricultural June Census and the data are no longer collated (Bleasdale, 2007). Estimates of the area of tenanted land within Wales vary from just over 20 per cent (Bleasdale, 2007) to 24 per cent (Agricultural Land Tribunal (Wales), 2007). These values have both been applied to give an upper and lower value of the area of tenanted land within Wales and for the combined total of England and Wales.

Table 2.1
The contribution of the tenanted sector to land occupancy in England and Wales in 2006

Area in ha	England ⁴	Wales	Total
Total area of agriculture land	9,328,573	1,499,606	10,828,179
Total area of tenanted land	3,303,002	Upper – 359,905	Upper – 3,662,907
		Lower – 299,921	Lower – 3,602,923
Tenanted land as % of total area	35.4 %	20 – 24 %	33.3 – 33.8 %
Total area of CF ⁵	99,694.6	18,010.1	117,704.7
County farms as % of total area	1.07 %	1.20 %	1.09 %
County farms as % of tenant sector	3.02 %	5.0 – 6.0 %	3.21 – 3.27 %

³ 1916 has been used as a base year as it is the first available year for which comparable data relating to agricultural area of England and Wales were produced by appropriate government departments (e.g. MAFF, 1968).

⁴ Data for England derived from Defra (2007a).

⁵ Data sourced from CIPFA (2007).

2.1 *The tenanted sector*

In 1873, 80 per cent of the land within Great Britain was owned by just 7000 men and the occupation of land was largely by tenants of the large landowners (Newby *et al.* 1978). Since then, a continual shift towards the owner occupation of land has seen the share of the tenanted sector fall (Gibbard *et al.* 1999) and it presently provides between 33 and 34 per cent of the total agricultural area in England and Wales (Table 2.1).⁶ The adoption of the Agricultural Tenancies Act 1995 and the introduction of the Farm Business Tenancy had the objective of reforming and revitalising the tenanted sector (Ilbery *et al.* 2006). One perceived benefit of Farm Business Tenancy agreements was the facility to increase the amount of land available for letting across the country (Whitehead *et al.* 2000). The trend since 1995 in the sector has generally been one of a yearly increase in the area of tenanted land, albeit with slight declines in 2003/2004 (CAAV, 2007). This anomaly has been linked to the 2003 Mid-term Review of the Common Agricultural Policy and the implementation of Single Farm Payments (CAAV, 2007). This would suggest that tenancy reform has been a partial success in halting the decline of land available within the tenanted sector.

2.2 *Classification of landlords*

The Northfield Report (1979) categorised landowners who let land in England and Wales within three main groups:

- Private owners, comprising individuals, companies and trusts, which account for approximately 90 per cent of land ownership. Whitehead *et al.* (2002) added retired farmers and property owners as new groups to the private landowners. Both groups owned land, but sought to let it rather than farm the land themselves.
- Traditional institutions comprising, amongst others, the Church, Ministry of Defence and CUA. These institutions are thought to own in the region of 8.5 per cent of land.

⁶ The validity of these types of data was questioned by Winter (2007), who suggests that crude data analysis on tenancy by government departments can be misleading. Comparables also become difficult as Ilbery *et al.* (2006) suggest because the distinction between owner occupiers and tenants has become increasingly blurred. This has been attributed to the tenure of land held under family trust ownership, share farming and the prominence of other arrangements (Winter, 2007). These other arrangements accounted for 13.7 per cent of land let over one year in 2007 (Defra, 2007a) and may contribute to inaccuracies within the data analysis.

- Financial institutions, classified as insurance companies, pension funds, property unit trusts and property bonds (Munton, 1979). This group owns 1.2 per cent of land.⁷

The trends and geography of landownership for some institutions are shown in Table 2.2. Comparisons are made between estate size in 2001 and 2007 and the data are obtained from various sources, often relating to different geographic locations. For that reason, the data can only be used as an indicative guide. However, they do hint at two possible trends. Firstly, in the short-term, the estate sizes of traditional agriculturally-based institutions (e.g. The Crown Estate, CFE and Duchy of Cornwall) are declining. These patterns suggest that the CFE appears to have been performing well over recent years compared to both the Crown and Duchy estates. However, there is strong evidence to suggest that over the past 25 years the losses sustained by the CFE have been much greater than those of the other traditional institutions⁸. Secondly, the estates of conservation groups (The National Trust and RSPB) appear to be increasing in size. They also suggest a potential shift in ownership from traditional institutions towards landowners whose main interest is not agriculture.

The Annual Tenanted Farm Survey is conducted by the Central Association of Agricultural Valuers (CAAV) and '*seeks to capture information about decisions in occupation of farm land*' within England and Wales (CAAV, 2007). Short-term trends for newly let farm tenancies granted between 2003 and 2006 are shown in Table 2.3. The total area of new lettings fell in 2006 compared to previous years. This has been attributed to decisions made in relation to the Single Farm Payments, particularly by private owners (CAAV, 2007). This has allowed landowners to claim entitlement through the payment scheme as agricultural production is no longer a prerequisite for their receipt (Ilbery *et al.* 2006). Private owners account for around three quarters of all newly let tenancies granted over the past four years. In terms of area of land supplied, CF account for between just 3.21 and 3.27 per cent of the tenant sector across England and Wales (Table 2.1). Despite this, over the past four years they have accounted for just over 6 per cent of all new farm tenancy agreements. This

⁷ Defining the form, nature and structure of land ownership in Britain is problematic (Massey and Catalano, 1978; Northfield, 1979; Cahill, 2002). The figures for land ownership by group are taken from Northfield (1979).

⁸ George Dunn (TFA Chief Executive), personal communication, 26 February 2008.

helps highlight the significant contribution that CF continue to make to the tenanted sector, despite only providing a small proportion of land.

Table 2.2
Landownership by some major landowning institutions in the United Kingdom, 2001 to 2007

Institution	Size of estate (ha)			Geographic location
	2001⁹	2007¹⁰	Per cent change +/-	
Forestry Commission	971,267	350,000	- 64	UK
Ministry of Defence	303,521	240,000	- 21	UK
The National Trust	222,582	245,000	+ 10	England, Wales and Northern Ireland
The Crown Estate	155,403	137,000	- 12	UK
County Farms	121,408	117,705	- 3	England and Wales
RSPB	114,529	130,000	+ 14	England, Wales and Scotland
Duchy of Cornwall	57,062	54,648	- 4	England and Wales

Table 2.3
The area of land let in England and Wales on newly let tenancy agreements by landlord classification from 2003 to 2006 (Adapted from CAAV, 2007)

Landowner	2003		2004		2005		2006	
	Area	%	Area	%	Area	%	Area	%
Private owners	41,450	71.5	33,664	79.0	36,724	76.1	26,219	73.5
Traditional Institutions	8,513	14.7	4,992	11.7	6,153	12.7	6,076	17.0
CUA	4,382	7.6	2,303	5.4	3,287	6.8	1,642	4.6
Financial Institutions	3,597	6.2	1,644	3.9	2,115	4.4	1,713	4.8
Total	57,942	100	42,603	100	48,278	100	35,649	100

⁹ Adopted from Cahill (2002)

¹⁰ Derived from, Crown Estate (2007), Duchy of Cornwall (2007), Forestry Commission (2007), MOD (2007), National Trust (2007), and RSPB (2007).

2.3 Provision of land within the tenanted sector

The condition of the land let to tenants is classified by the following land let types:

- Equipped farms: providing buildings, yards and accommodation;
- Buildings: generally with buildings but not accommodation; and
- Bare land: provision of land only.

The introduction of Farm Business Tenancies has been associated with an increase in the letting of bare land (Whitehead *et al.* 2002). The area of land and number of holdings let, by land let type, for new tenancies created in 2006 is shown in Table 2.4. An increase in the letting of bare land was noted by Whitehead *et al.* (2002), who observed that it accounted for 81 per cent of all Farm Business Tenancy lets in 2001. In 2006, bare land lets provided over half the area of land and over three quarters of the number of holdings let on new tenancy agreements. Equipped holdings only accounted for 18.9 per cent (6,802 ha) of the total area and provided 7.1 per cent of holdings (85). The average size of holding was considerably higher for both equipped farms (86.2 ha) and farms with buildings (81.7 ha) than for bare land (23.9 ha). This would suggest that bare land is generally let out in smaller parcels to supplement existing holdings.

Table 2.4
The land let types of new tenancy agreements for England and Wales in 2006 (Adapted from CAAV, 2007)

Land let type	Total let on new agreements in 2006 (ha)			Per cent of total let	
	Area	Holdings	Average size of holding	Area	Holdings
Equipped holdings	6,802	85	86.2	18.93	7.15
Buildings	8,486	190	81.7	23.62	16.00
Bare land	20,640	913	23.9	57.45	76.85
Total	35,928	1,188			

The CAAV (2007) highlights the importance of the CFE to the tenanted sector, noting that in 2006 they accounted for 36 per cent of all new let fully equipped holdings. The same research shows that private owners supply 47 per cent of the same holdings. This is despite CF accounting for just 2.88 per cent of the tenanted sector (by area) (see Table 2.1). Most land is let without the provision of accommodation for the tenant. This pattern of letting reflects the findings of Ilbery *et*

al. (2006), who suggest that the sector is likely to see an increase in the letting of bare land as landlords look to utilise houses and buildings for non-agricultural activities. The limited number of equipped holdings is a potential obstacle for new entrants looking to enter the industry.

2.4 *Rental value of let land*

Defra publish data relating to rental returns for different types of tenancy agreement (Defra, 2007b). The rental values for Full Agricultural Tenancy and Farm Business Tenancy agreements for seasonal lets from 1997 to 2006 are shown in Table 2.5. The figures show a decline in the rental value per ha of land for all tenancy types over the time period. Rental values for full agricultural tenancy agreements have remained fairly constant, albeit with a slight net reduction. Farm Business Tenancy agreements fell by 25.5 per cent over the ten year period, but still provide higher returns than Full Agricultural Tenancy agreements. Seasonal lets have seen significant fluctuations, especially in 2002 and again in 2006. This mixed pattern of tenure may be due in part to the ability of landlords to claim Single Farm Payments, thus reducing the agricultural value of the land to the tenant.

Table 2.5
Rental values of different types of tenancy agreements in England and Wales from 1997 to 2006 (Sourced: Defra, 2007b)

Year	Full Agricultural Tenancy (£/ha)	Farm Business Tenancy (£/ha)	Seasonal lets (£/ha)	Average (£/ha)
1997	115.65	178.90	142.29	145.61
1998	118.14	177.47	126.28	140.63
1999	118.62	173.78	131.34	141.25
2000	114.76	164.98	123.77	134.50
2001	111.33	161.33	129.71	134.12
2002	110.13	156.05	102.85	123.01
2003	No data	No data	No data	No data
2004	110.93	147.29	134.89	131.04
2005	No data	No data	No data	No data
2006	113.98	133.21	101.95	116.38
Per cent change, 1997 to 2006	-1.40%	-25.50%	-28.40%	-20.10%

Whitehead *et al.* (2002) suggest that Farm Business Tenancies would allow rented land to be more responsive to market forces. The fluctuations in rental returns for all sectors, apart from Full Agricultural Tenancies, may be a response to changes in market values.

Table 2.6
The rent returns per hectare for different land let types for county farms from 1997 to 2007

Year	Equipped holdings (£/ha)	Bare land only (£/ha)	Short-term lets (£/ha)	Average (£/ha)
1997/98	181.80	163.01	217.75	187.52
1998/99	182.72	166.32	230.26	193.10
1999/00	184.85	168.00	203.15	185.33
2000/01	188.54	168.60	No data	178.57
2001/02	183.59	159.47	No data	171.53
2002/03	188.35	142.85	93.05	141.42
2003/04	182.91	151.79	85.67	140.12
2004/05	193.49	142.76	358.07	231.44
2005/06	192.40	134.48	291.73	206.20
2006/07	188.75	153.98	334.37	225.70
Change	+3.80%	-5.54%	+53.56%	+20.36%
Average price (£/hectare)	186.74	155.13	226.76	189.54

A breakdown of rental values for land by land let types for the CFE for the period 1997 to 2006 is shown in Table 2.6. The table shows differing trends for rental values for each of the individual land let types. Firstly, equipped holdings have shown a marginal increase, but have remained fairly consistent throughout the period. This stability is likely to be attributed to a greater security of tenure for equipped holdings. Whitehead *et al.* (2002) show that for Farm Business Tenancies the average duration for equipped holdings is ten years, compared to three years for farms offering buildings only and two years for bare land lets. The CAAV (2007) show that in 2006, the average length of new let tenancy agreements for equipped holdings was 9.6 years, compared to 5.14 years for those with buildings and 3.01 years for bare land lets. Again, this highlights the increase in bare land lets, as the average Farm Business Tenancy agreement ran for 3 years and 9 months which, given the short-period, must be influenced by a significant number of bare land lets. Both these sets

of statistics show a greater degree of stability within the tenanted sector for equipped holdings and make rental values for them less susceptible to short-term market fluctuations. Secondly, bare land let rental values have shown fluctuations, particularly over the past five years, with a slight overall net decrease. This trend would suggest that landlords are increasingly using buildings and accommodation to generate non-agricultural incomes from their property. By doing this, the agricultural value of the bare land falls, leading to lower rental returns. Short-term lets have seen significant fluctuations throughout the period, but have witnessed an overall rise in their value of over fifty per cent. The relatively short period of both bare land and short-term lets allows them to be subjected to market forces and external factors; for example, these include the short-term implications of Single Farm Payments and the impacts of diseases, such as foot and mouth and blue tongue. Thirdly, given the small changes in the rental values of both equipped holdings and bare land lets, the influence of short-term lets within the tenanted sector is significant. The increase in rental value of short-term lets since 2004/05 has reversed a falling trend in the average rental value of land and contributed to an average rise of over twenty per cent. Yet the meaning of short-term lets is difficult to define, suggesting that landlords are seeking novel, non-traditional, ways to derive additional value from their land. Finally, by comparing both Tables 2.5 and 2.6 it can be seen that the CFE returns higher rental values than the general tenanted sector. A higher proportion of equipped holdings and increased capital expenditure by CUA landlords may contribute to this trend. The combination of the first three trends is likely to reduce the availability of equipped holdings on secure tenancies. This is most detrimental to those without alternative holdings and new entrants to the industry. The CFE presently provides a high proportion of equipped holdings and the importance of this service to new entrants to the industry is likely to become even more significant given current developments within the general tenanted sector.

3 The structure of the county farms estate in England and Wales

The CFE provides a basic service of agricultural opportunity, rural employment and a financial resource through rental returns. The aim of this section is to analyse the present spatial and temporal geography of the estate. This will be followed by analysis of the employment and financial performance of the CF service. The section will conclude with an evaluation of the success or otherwise of the service that the CFE provides to the tenanted sector within England and Wales.

3.1 *The geographical distribution of the county farms estate*

The overall trends in terms of the size and structure of the CFE of England and Wales between 1964 and 2007 are summarised in Table 2.7. During this period, the estate reduced in size by around one-third and the number of holdings fell to around one-quarter of the 1964 total. This large reduction in the total number of holdings is in part driven by the increase in average holding size. The need for an increase in holding size can be attributed to stipulations contained within the Agriculture Act 1970 to create more fully commercial holdings. It can also be linked to a general pattern of holding enlargement that has occurred to help maintain the economic viability of agricultural holdings due to financial constraints.

Table 2.7
Temporal changes within the county farms estate from 1964 to 2007

Year	Area of estate (ha)	Number of holdings	Average holding size (ha)
1964	177,883	16,346	10.9
1974/75	164,725	9,823	16.8
1996/97	133,922	5,316	25.2
2001/02	126,188	4,684	26.9
2006/07	117,704.7	4,488	26.2
Per cent change from 1964 to 2007	-33.8	-72.5	+240.4

The CFE is distributed among sixty two CUA within England and Wales and, of these, Cambridgeshire is the largest, covering 13,907 ha and 274 farm tenants. The extent of the Kent estate is the smallest, providing only 10.4 ha. Six main farming activities are undertaken across the CFE, namely: 'horticulture', 'arable', 'dairy',

‘dairy / stock rearing’, ‘mixed / general’ and ‘stock rearing’. This can be simplified through a geographical division of the estate, with the largest four individual CUA (Cambridgeshire, Lincolnshire, Norfolk and Suffolk) offering mostly arable farming in the east and livestock prevailing within southern and western CUA¹¹.

3.2 *Tenure on the county farms estate*

The length of Farm Business Tenancy offered by CUA varies from undefined short-term lets to agreements over fifteen years (Table 2.8). The average mean length of tenancy agreements has increased since 1998/1999, when it was under five years, to between five and ten years in duration. Given the variation in tenancy lengths shown above in relation to the provision of let land, this lengthening of average tenancy would suggest that the CFE provides a large number of equipped holdings. The average duration of CF tenancies is considerably longer than the average Farm Business Tenancy for the tenanted sector that lasts for an average of 3 years and 9 nine months (CAAV, 2007).

Table 2.8
The term length and total number of new tenancy agreements per annum on county farms from 1997 to 2007

Year	Short-term, non FBT	< 5 years	5 - 10 years	10 - 15 years	> 15 years	Mean tenancy length
1997/98	186	466	134	85	101	Under 5 years
1998/99	233	505	185	105	151	Under 5 years
2000/01	188	342	297	175	194	5- 10 years
2002/03	228	397	350	224	199	5- 10 years
2004/05	228	404	472	235	257	5- 10 years
2006/07	303	392	470	273	288	5- 10 years
Average	228	418	318	183	198	5- 10 years

The number of tenancy agreements on CF across England and Wales has fallen steadily over the past ten years. This is to be expected given the reduction in number of holdings on the estate. The amount of land disposed of each year from the CFE portfolio of CUA has fallen from 3,805 ha in 1999 to 1,375 ha in 2007. A reduction in land disposals can be linked to the fall in the number of tenancy

¹¹ Charles Coats (Gloucestershire County Council), personal communication, 25th October 2007

agreements, the increase in duration of tenancies and the enlargement of holdings. As holdings are enlarged to aid viability, the number of tenancies terminated per year falls and so CUA have less land available to restructure and sell. This pattern will be intensified if the length of tenancy agreements increases. Short-term tenancies offer less security to tenants and provide CUA with a readily accessible commodity, thus potentially making the future of the CFE less secure. The provision of short-term lets has increased significantly over the ten year period. Further research is needed to give a meaningful definition to the nature of short-term lets and to allow an evaluation of how they may impact on the CF service.

3.3 *Employment within the county farms estate*

Figures of employment for the CFE across England and Wales are published annually by CIPFA, but they are crude and should be considered carefully¹². The list of employees includes tenants, professionals, technical staff and clerical workers (CIPFA, 2007). The statistics suggest that in 2006/2007 the CFE sustained around six thousand employees across England and Wales. Of these workers, 127 were employed within management and 5,868 across the entire estate, but little indication is given of the role of these people. Additional employment will be generated through the hiring of farm labour and by CUA conducting repairs and construction work on farms. The true value of the CFE in providing employment opportunities across England and Wales is presently very difficult to quantify.

3.4 *Financial performance of the county farms estate*

The rental returns for the CFE in England and Wales for 2006/07 realised over £20 million. The total income, including CF rents and other rents and income, was £23,634,000¹³. The total expenditure of the entire estate was £12,838,000, which included repairs, maintenance, rates and management costs. This left an operational surplus of £10,796,000 for CFE over England and Wales. This surplus has fallen since 2002/03, when it totalled £13,795,000. The five-year trends of rental returns and operational surplus show a steady decline over the period 2002 to 2007 (Figure 2.1). It has already been shown that the average land rental values of CF have

¹² Charles Coats (Gloucestershire County Council), personal communication, 24 January 2008

¹³ Figures derived from CIPFA (2007). It is important to note that the financial return figures quoted do not include any returns from the sale of land or farms and only represent the returns from the commercial letting enterprise.

increased and this will help to offset the loss of earnings caused by the reduction in estate size. Capital expenditure on the CFE has increased from £4.3 million (2002/2003) to £8 million in 2006/2007 (Figure 2.2). This expenditure includes construction, improvements and land drainage. Expenditure in England has risen significantly over this period, whilst that in Wales has increased only slightly. The restructuring of holdings has allowed sales of traditional buildings and accommodation to take place, but it has also required the construction of modern facilities to replace them. This development will have contributed to the increased expenditure within recent years. The statistics do not include the financial returns from the sale of property and therefore do not give a true reflection of the financial performance of the CFE.

Figure 2.1
The annual income, rental returns, expenditure and operational surplus of the county farms estate in England and Wales between 2002 to 2007

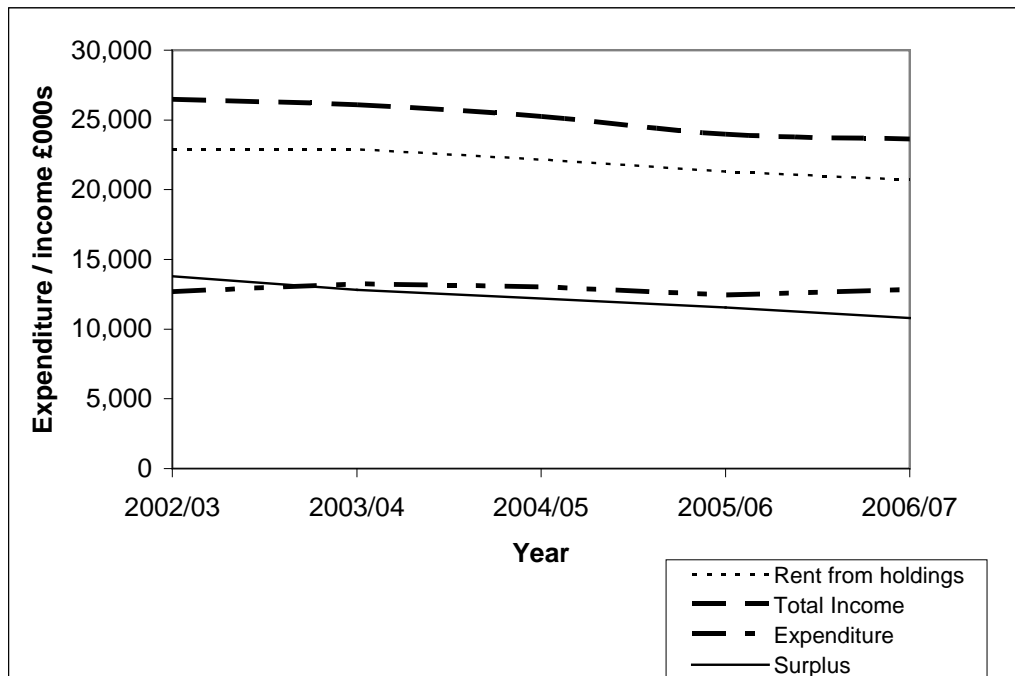
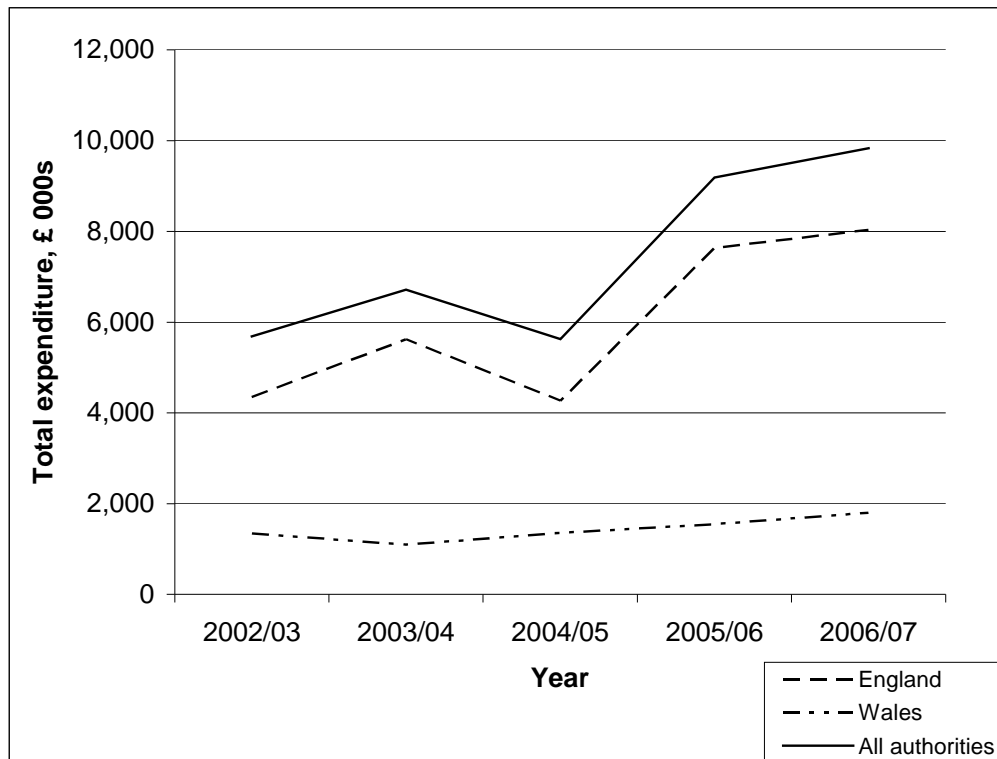


Figure 2.2
The capital expenditure on the county farms estate in England and Wales between 2002 to 2007



3.5 The success or otherwise of county farms estate

The professionals primarily employed to manage the CFE within England and Wales are represented by a national organisation, The Association of Chief Estate Surveyors, and Property Managers in the Public Sector: Rural Practice Branch (ACES). This group holds regular meetings and advises on agricultural matters and issues relating to the CFE. ACES stipulates within their rationale that one of the fundamental aims of the CFE is to ‘allow new entrants to establish and develop viable agricultural enterprise’ (ACES, 2007a). The importance and relevance of the CFE to the new starter was borne out by both the Wise Committee Report (1966) and the Northfield Report (1979). Research by The Association of County Councils (ACC, 1989) highlighted the following key trends between 1977 and 1988:

- 1,400 new tenants entered the CFE system;
- 2,229 tenants used the CFE to expand their existing holdings, or move onto new holdings to progress their business; and
- 102 moved onto land within the private sector.

These figures show that during the research period an average of over 100 new entrants a year gained access to the industry through the CFE. Errington *et al.* (1987: 7 and 25) stated that for those starting out through a non-inherited agricultural business 24 per cent (of the sample survey) were utilising ‘*county council smallholdings*’. Whitehead *et al.* (2002) commented that one-third of new CF lets were to new starters and 90 per cent of these lets were for fully equipped holdings. The importance of the CFE as a mechanism for new entrants to enter the industry is apparent. Both the Tenancy Reform Industry Group (TRIG, 2003) and the Tenant Farmers Association (TFA, 2008) have called for governmental support for the CFE and new entrants to the industry. Schemes such as the Fresh Start Initiative suggest a desire within farming to help new entrants establish themselves. However, little information exists as to the actual, present needs of new entrants to aid their establishment within the industry.

The research by the ACC (1989) highlights the movement of tenants within the CF structure as they develop their businesses over time. It also underlines the apparent lack of movement by tenants from CF and onto holdings within the private sector. In 2006, only ten CF tenants progressed to take up farming opportunities elsewhere (CIPFA, 2007). When considered in relation to the 3,744 tenants on the CFE, this figure is very small and would suggest stagnation of tenants within the CFE. The data are only available for one year, but this is still nevertheless an issue of concern to interested parties. In Norfolk, for example, the relatively high average age of tenants (55 years old) on CUA holdings is causing concern, with a number aged over 80 (ACES, 2007b). However, this problem is not specific to the CFE; issues of tenant retirement were addressed by the Tenancy Reform Industry Group (TRIG, 2003) and identified as a significant problem across the whole tenanted sector. Explanations for stagnation within the CFE could include a lack of equipped holdings within the private sector for CF tenants to move onto or a lack of desire from tenants to move. It is therefore important to assess the views of CF tenants and ascertain how they view the future progression of their agricultural business. The increase of bare land lets will create problems for tenant farmers as they seek progression. Discussing the matter with private landlords could help to evaluate future opportunities for tenants to progress from the CFE into the private sector. These and other research issues will be explored more fully in the final section of this research paper.

4 The non-agricultural value of the county farms estate

The underlying agricultural aims of the CFE are to provide an opportunity for young people and new entrants to enter agriculture in an affordable manner (ACES, 2007a). By providing this service, they also:

- Support the tenanted sector;
- Foster rural employment;
- Bolster the rural economy.

In addition, the service helps provide educational, environmental and alternative economic services as part of its implied obligation, under the ACES rationale, to the wider rural community (ACES, 2007a). This section looks at the use of non-agricultural services that can add value to the CF sector.

4.1 Economic resource

It is arguable that the biggest threat to the CFE is the facility they offer to a CUA as a financial resource. This is exemplified by Staffordshire, where some councillors want to sell off the CFE in order to benefit from soaring land prices (NFU, 2007). These pressures arise due to an increase in land prices of 762 per cent over the last twenty years (Savills, 2006). However, the benefits of land sales are not always as lucrative as they may first appear. Sales of land entered into tenancy agreements are not straight forward and sales with sitting tenants generally return lower values than those with freehold possession. North Yorkshire has adopted a blanket policy of selling off farms at the end of tenancies, yet this course of action may not produce optimum financial returns from the disposal of the CFE. By reviewing individual policies at the end of each tenancy agreement, a CUA can act in their best interests, specific to their own requirements and according to prevailing economic conditions, rather than in a pre-determined manner. The Investment Property Databank (IPD, 2007:3) suggests that, due to the present economic conditions, it may be wise for those '*who want to release capital from their agricultural estates to do so while the market is booming*'. Pearce (2008) suggests that the recent increase in food prices and use of biofuels may lead to investors viewing land as a commodity in which to invest. Both these views highlight uncertainty towards future land prices. This suggests that a CUA considering the future of individual holdings at the end of a tenancy agreement could gain maximum financial returns from the land. By considering individual holdings at the end of the tenancy, CUA can restructure holdings and allow:

- Amalgamation of holdings and land to maintain the financial viability of agricultural holdings through enlargement;
- The release of small parcels of land, buildings and property for sale; and
- The development of non-agricultural uses.

This process reduces the number of individual holdings on the CFE, but helps tenants to maintain their income levels. The restructuring of holdings also helps to create a more efficient estate through modernisation and centralisation. The value of land sales is obviously a potential source of income to CUA. One issue exploited by Gloucestershire County Council is the use of land made available from restructuring of the CFE for non-agricultural development¹⁴. This option is dependent on the location of land, but has allowed housing and public services to be developed on land that the CUA owns. By considering each unit of land on an individual basis, it allows Gloucestershire County Council to adopt action that reduces expenditure and utilises the CFE to its maximum potential.

4.2 *Educational resource*

The ‘Year of Food and Farming’ runs from September 2007 to July 2008 and is an industry-led project aimed at helping children to find out more about their food and the countryside. In Hampshire, for example, a CF tenant has established a link with the CUA and takes a selection of animals to various schools for educational purposes. This arrangement has benefits to both parties. The tenant generates additional income, as they are paid for the service, and the school get an educational facility without the addition of excessive out-of-school costs. Devon and Cornwall County Councils have both developed educational centres on their CFE and these facilities help provide educational benefits and thus add value to the CF service.

The educating of people about the food they eat has recently been brought back into the public domain. A recent Channel Four campaign by celebrity chefs Jamie Oliver and Hugh Fernley-Whittingstall, for instance, aimed to inform consumers of welfare issues related to the food they purchase. This style of education promotes the advantages, to both animals and humans, of organic and free-range production, as opposed to more intensively-farmed methods. The Duchy of Cornwall has also adopted organic principles and actively promotes the production of organic produce to

¹⁴ Charles Coats (Gloucestershire County Council), personal communication, 25th October 2007

tenants through a self-lead programme (Duchy of Cornwall, 2007). The adoption of organic schemes on CF could provide the tenant with a value-added product and the customer with produce they feel happier to buy on moral grounds. An extreme example of this could see CF tenants supplying the CUA with produce that they request, to be used within their schools. This link-up could have numerous benefits:

- Provision of healthy school meals;
- Reduction in the carbon footprint of food;
- Increased educational awareness;
- Creation of local food processing jobs; and
- Developing new markets for tenants.

All the issues listed above offer alternative uses for the CFE that can help satisfy agricultural and rural issues, as well as educational concerns. The use of the CFE to address environmental issues is explained more fully in the next sub-section.

4.3 *Environmental resource*

There are a wide range of environmental considerations and obligations that CUA are duty-bound to consider. These include climate change, environmental health and waste and recycling (e.g. Northamptonshire County Council, 2008). Renewable energies are being promoted by the British Government and the European Union due to their contribution to a low carbon economy (Defra, 2006). The provision of renewable energies can have a direct impact on agriculture, particularly through the use of biofuels. Hampshire County Council, for instance, has installed a biofuel boiler into its social housing provision and presently purchases oil seed rape from outside the area to provide fuel (ACES, 2007b). A more sustainable approach to this could see local farmers supplying oil seed rape to power this facility. This would help the CUA reduce carbon emissions and provide tenants with an alternative market for their produce. Cornwall County Council is looking into the development of aerobic digestion facilities to help meet recycling requirements and reduce the burden of landfill costs. Development of such activities could help tenants create new enterprises and help CUA reduce costs and meet environment obligations. The issue of flooding and the importance of flood plains have been prominent recently due to frequent floods. Defra (2007c) is seeking to promote more sustainable methods of land management to help minimise flood impacts. CUA could use their position as major landowners to plan and implement flood management policy. Developing

management policies to address flooding problems could see the CFE utilised in numerous ways. These could include:

- The implementation of drainage programmes to help manage water flow;
- The creation of wetlands to allow controlled flooding; and
- The procurement of land within the flood plain through restructuring sales or land-swap agreements with existing owners.

Adoption of alternative policy to combat flooding could enable the CFE to become a more valuable asset, to other non-agricultural departments, within a CUA. These examples show alternative uses of land that can be adopted by CUA to derive added value from their estates and provide alternative services other than agriculture.

Issues of recreational and leisure use have not been addressed within this research paper, but they are other alternative uses for the CFE. The alternative use of traditional agricultural assets highlighted above represents a shift away from productivist methods towards a post-productivist era as discussed by Ilbery and Bowler (1998). Diversification into alternative agricultural and non-agricultural services on the CFE can allow both tenants and CUA to promote agricultural multifunctionality and economies of scope (Marsden *et al.* 2002; Ilbery *et al.* 2008). Adoption of these allows the development of a range of markets and services that helps position the '*farm as a central dimension*' in helping to provide a sustainable rural economy (Marsden *et al.* 2002: 810). The wording of the ACES rationale stipulates that new entrants should be allowed to develop a viable agricultural enterprise (ACES, 2007a). Viability of holdings on the CFE was addressed by the 1970 Agriculture Act and since then holdings have been managed to provide fully commercial units. However, the need to maintain viable holdings has seen more than two thirds of tenant farmers use diversification activities to support farm incomes (Ilbery *et al.* 2006). The ability of CF tenants to diversify has been questioned due to a lack of flexibility within tenancy agreements¹⁵, although diversification activities by tenants can potentially create problems that are contradictory to the purpose of the CFE. If tenants diversify, they may become reliant on a holding and unwilling to move at the end of the tenancy. This would go against the basic principles of the CFE and potentially create apathy amongst tenants towards progression onto other holdings and contribute to the tenant stagnation that occurs within the system. If CUA promote

¹⁵ George Dunn (TFA Chief Executive), personal communication, 26 February 2008.

diversification away from agriculture, but still require the tenants' input, the situation is rather different. The business could then be linked to the holding, rather than to the tenant, and be passed on to subsequent tenants. It would be beneficial to undertake research on how individual CUA are developing the multifunctionality of their CFE to help satisfy other obligations. This research would help assess the true value of the CFE to CUA and it could also be used as a benchmarking facility to inform other CUA of alternative uses for their estates.

5 Conclusion and potential research questions

The process of defining land use in England and Wales is not a straightforward task. The consensus is that the tenanted sector occupies approximately one third of the agricultural land across the two countries. The transition to Farm Business Tenancies appears to have halted declines in the amount of land available within the tenanted sector. Indeed, trends suggest that since 1995 the amount of available tenanted land has generally increased. However, the availability of fully equipped holdings appears to be falling as more land is let as bare land, without the provision of buildings and/or accommodation. This is occurring as landlords seek to gain optimum financial returns and non-agricultural uses for their property. It has been suggested that the rents for bare land lets may in future fall towards zero (Ilbery *et al.* 2006). As landlords look to create markets from the non-agricultural use of their land, so the opportunities for new entrants who require buildings and accommodation to establish their holdings will be reduced. Bare land will be readily available to rent, but this will favour established farmers who add land to existing holdings to satisfy economies of scale (Pearce, 2008). A shift towards the letting of bare land will also affect those tenant farmers looking to a multifaceted approach of 'economies of scope' (Ilbery *et al.* 2006). This approach exploits resources, traditionally used for agricultural production, to increase the range and value of production services (Marsden *et al.* 2002). The removal of buildings and accommodation from holdings can reduce the ability of the tenant to diversify. Potentially, this has a detrimental impact on the industry as it stifles the input of new ideas and restricts the actions of entrepreneurs.

Recent trends suggest that the size of estates owned by traditional institutes is shrinking. The size of estate owned by some traditional landowners such as the Duchy of Cornwall and the Crown, for example, is, in the short-term, declining at a

faster rate than the CFE. The rental returns from the CF sector have shown an increase over the past ten years and have out-performed the general tenanted sector. Returns have fallen by twenty per cent in the general sector and can be linked to the increase in the letting of bare land as landlords look to generate alternative incomes from buildings and accommodation. The main increase within the CF sector is due to a rise of over fifty per cent in the value of short-term lets. This trend appears contradictory as seasonal lets within the general sector have shown a reduction of twenty eight per cent over the same period. This anomaly may be explained by a different classification of the let types. Despite achieving higher rents than the rest of the tenanted sector, total income returns have fallen in the CF sector. The operational expenditure nearly doubled in the period 2002 to 2007, which helped contribute to a continual fall in operational profits over the same period.

The position of the CFE within the agricultural sector of England and Wales has changed considerably over the past one hundred years. One of the fundamental aims of the CFE was to address the imbalance of landownership and to encourage people to become owner occupiers. Over the last hundred years, the size of the tenanted sector has reduced significantly as owner occupancy has increased. The shift has been such that legislation contained within the 1995 Agricultural Tenancies Act has been created to address the loss of land from within the tenanted sector (Whitehead *et al.* 2000; Ilbery *et al.* 2006). Consequently, the philosophies behind the CF service are now different to what they were in 1908. Social considerations have become more assigned to the provision of opportunities for new entrants. Owner occupancy is at such a level that concerns are likely to be raised with regard to a lack of holdings available within the tenanted sector, rather than an over provision within the service, as there was in 1908. Changes in the size of the tenanted sector were discussed within the Wise Committee Report (1966) and lead to legislative changes adopted within the 1970 Agriculture Act that still influence how the CFE is managed and perceived in 2008. This means that the facility can only be viewed as a gateway into farming, but its importance to new entrants to the industry is widely recognised. Its value is shown in the provision of fully equipped holdings within the tenanted

sector¹⁶. The CFE provides less than five per cent of land within the sector, but accounted for over one third of equipped holdings on new lets in 2006¹⁷. These figures suggest that up to one third of new entrants could enter farming through the CF system. In reality, it is unlikely that all new CF tenancies will be given to new starters. Errington *et al.* (1987) suggested that twenty four per cent of new starters used the CF system to gain a foothold in agriculture. It is presently not possible to stipulate an exact figure, but given the recent increase in the letting of bare land, present levels are likely to be similar if not higher than those discussed by Errington *et al.* Research needs to be conducted to ascertain the number of new starters that enter agriculture through the CFE. By gathering these data, it will allow a true value to be placed on the CFE as a 'gateway' to new entrants to the industry.

The extent of farm diversification within the tenanted sector by both landlord and tenant was discussed at length by Ilbery *et al.* (2006). The nature of the CFE means that it offers the opportunity for both the landlord and the tenant to diversify. The impact of tenant diversification on CF may be detrimental to the progression of tenants and therefore help contribute to a stagnation of tenants within the service. If a tenant diversifies, they may become tied to a particular holding and thus less likely to progress onto alternative holdings. A multifunctional use of the CFE by CUA already exists within some areas, but this has the potential for more widespread use. This helps CFE provide a range of environmental, educational and recreational services that go beyond their basic use for agricultural production. This adds value to the overall service provided by the CFE across England and Wales. Yet, this value appears to be little understood and thus undermines the position from which CUA view the CFE.

The aim of this initial research is to assess the present level of understanding of the CFE within England and Wales and to identify areas where empirical knowledge

¹⁶ The Central Association of Agricultural Valuers (CAAV, 2007) discusses the passage of new entrants into the tenanted sector and suggest the following trends for 2006: 65 per cent of lettings to new starters were by private owners: 12 per cent by traditional institutions: 18 per cent by CF and 5 per cent by financial institutions. It must be noted that these were for all types of new lets and that the data are '*not based upon any robust definition, but may give some moral sense to the situation*' (CAAV, 2007: 10)

¹⁷ Whitehead *et al.* (2002) suggest that 90 per cent of CF lettings to new entrants were for fully equipped holdings.

and understanding are limited. The purpose of this is to allow the formulation of suitable research questions that can be developed and explained in future phases of this research project. A number of areas warranting additional research are summarised below:

I. Are CF still relevant to the needs of the agricultural industry?

One of the fundamental aims of the CFE is to provide opportunities for new entrants to enter the industry, yet very little is known about the extent to which new entrants utilise the service. Talking to tenants could allow evaluation of the service provided by CF, particularly in providing a ‘gateway’ service to new starters to the industry. This could be extended by assessing the opportunities required for new starters by talking to the members of the Young Farmers Club and Fresh Start Academies. Identification of the role that the CFE occupies within the wider tenanted sector will also be important. It will, therefore, be necessary to interview members of other interested parties, including the Tenant Farmers Association and National Farmers Union.

II. How do CF tenants view their future farming careers?¹⁸

Tenant farmers on the CFE have a moral obligation to maintain and enhance the CF service. They have been allowed to use the facility to become established within the farming sector and therefore have an implied duty to ensure the future provision for new entrants to the industry. There is strong evidence to suggest that the stagnation within the CFE is restricting the flow of tenants through the system. For these two reasons, it will be important to talk to tenants and research the following questions:

- a. Are tenants actively seeking progression through the CFE or into the private sector?
- b. What are tenants’ experiences of trying to become established within the private sector?
- c. Are they happy or resigned to staying on their present holding within the CFE due to a lack of alternative options?

Evaluation of the views and management policies of private landlords could also help to determine the opportunities available to CF tenants within the private sector and

¹⁸ The views of tenants were sought by the Wise Committee and provided answers that were ‘*interesting and informative*’ (Wise Committee Report, 1996: 75 – 78). Using the questions asked by the Wise Committee would provide a suitable starting point for further research and allow comparisons as to how perceptions of the CFE have changed, or otherwise, over the past forty years.

offer the possibility of forging links between the CFE and private landowners to aid progression.

III. What is the mid to long-term future of the CFE?

Constant restructuring of the CFE has been occurring since the 1970s due to the legislative requirements of the 1970 Agriculture Act. This process has seen a continual decline in the area and number of holdings on the CFE. Property has been sold through either full estate disposal or in small parcels of surplus or high value land. These sales have all been influenced by the different management strategies adopted by individual CUA. It will therefore be important to interpret the present management policy of individual CUA to help predict the mid to long-term future of the CFE.

IV. What is the full multifunctional value of the CFE?

The CFE has the potential to become a multifunctional service that provides a resource not only for agriculture, but to the wider rural community. Working more closely with all interested parties within case study areas could allow a true appraisal of this multifunctional potential. This will help evaluate the economic, educational, environmental and recreational service presented by the CFE and allow recognition of its overall value to CUA.

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