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Policy Research



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Devon County Farms: Future Opportunities

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February 2026

ISBN: 9781915961051



Acknowledgements

We are grateful to Devon County Council and their delivery partners for funding this research and to all the tenants and stakeholders who participated.

The views expressed in this report are those of the authors and are not necessarily shared by Devon County Council.

To be cited as: Maher, A., Winter, M., Broomfield, C. and Lobley, M. (2026) Devon County Farms: Future Opportunities. CRPR.

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Executive Summary

Within the context of an increasingly unpredictable climate and pressures to reduce climate emissions within on-farm production systems, UK farmers are arguably facing one of the biggest transitions in agricultural policy since the post-war settlement. The introduction of the Environmental Land Management programme, which replaces support per hectare with payment for provision of ongoing environmental goods and services, presents a particular challenge for tenant farmers who operate on largely short-term Farm Business Tenancies. The Government commissioned Rock Review (2022) of English tenant farming points to the need for increasing collaboration between farming landlords and tenants in order to support the tenanted farming sector to meet these growing challenges. While these challenges are being felt by all types of farming landlords, for County Farm Estates (CFE), a legacy of Government underfunding of Local Authorities puts particular pressures on the ability of these estates to tackle this complex, still evolving challenge.

Against this background the aim of this commissioned research was to understand how the Devon CFE can build resilience to the impacts of climate change, socioeconomic pressures and government policy, and how the CFE can maximise future opportunities presented by a changing food and farming sector. The specific aims of the research were to:

- Review the baseline data for the CFE and its tenants.
- Review previous research and learning in the context of the CFE and identify gaps.
- Review national, regional and local policy and strategy in the context of the CFE and explore challenges and opportunities.
- Explore the unique challenges and opportunities for the CFE and what support tenants might need to build resilience and take up opportunities.
- Explore how the CFE and other Devon County Council (DCC) pilots and programmes can work together to demonstrate and support best practice.

Three complementary research methods were adopted to carry out this research. First an in-depth policy review evaluated the current and emerging policy landscape impacting on CFE tenant farmers. Next semi-structured interviews with a sample of CFE tenants explored the issues raised within the policy review process and the capacity for tenants on the CFE to build resilient businesses in order to meet these challenges. Finally, a workshop with a sample of CFE tenants explored the opportunities for the CFE to implement changing practices or projects to support more resilient farm businesses.

The findings of this research point to the challenges and opportunities for tenant farmers on the CFE as they transition into a new and, at times, uncertain policy environment. Some of the challenges highlighted are systemic, many other issues are common to many land-owning Local Authorities and other farming landlords. However, this research has highlighted opportunities for CFE management team in conjunction with tenants to review, revise and reimplement policies, practices and projects for the estate in order to build tenant farm resilience. This will provide DCC with the opportunity to develop exemplary estate management in this area.

In particular, research findings point to significant challenges with upgrading and investing in estate infrastructure particularly in the context of existing tenancy and ingoing/outgoing arrangements.



Our results suggest widespread understanding of the challenges of tackling some of these systemic issues while pointing to opportunities for more collaborative working to explore innovative approaches to bring more investment on to the estate. Tenants pointed to additional challenges in taking greater environmental action on farm within the context of current tenancy agreements and DCC strategic ambitions for the CFE.

Research findings also indicate to a number of opportunities for DCC and the estate management team at SouthWest Norse Ltd (SWN) to work with CFE tenants to realise more resilient farm businesses. CFE tenants identified specific moments in their farming career where advice and support may be more helpful and to renewed appetite for establishing peer networks on the estate. CFE tenants also wanted to support knowledge exchange with SWN, DCC officers and CFE committee members through more regular farm walks. CFE tenants were interested in opportunities to collaborate with DCC and contribute to strategic priorities. In particular, tenants raised green energy generation and supplying sustainably produced food for public sector supply chains as potential projects for collaboration. The research findings suggest that CFE tenants already provide a suite of social and environmental goods on the CFE, but there is an opportunity for DCC to provide more support to these CFE tenant farms, to build ever more sustainable, resilient farm businesses which contribute to delivery of DCC's strategic priorities.

Summary of recommendations

Recommendation 1: DCC to develop a new future orientated strategy for the CFE, in conjunction with stakeholders. This should include clear expectations about supporting different farming types on the CFE, to guide decision making about opportunities, infrastructure projects and dilapidations.

Recommendation 2: SWN/CFE committee councillors to undertake regular 'walk around' farm visits, alongside DCC officers, to build better understanding of: farming actions taken over the FBT; projects and repairs needed or planned; councillor knowledge of farming within a changing policy landscape.

Recommendation 3: SWN to revise welcome pack for new starters to the estate with key information, key contacts, a 'things to think about list' and more information about tenancy obligations in plain English.

Recommendation 4: DCC, SWN to support the establishment of tenant peer networks on the estate. These would include farm visits and talks from relevant speakers for example. These would have multiple benefits including: peer support, exchange of knowledge and an opportunity to foster cross-farm business collaboration.

Recommendation 5: Links to be strengthened between Trading Standards Team, DCC and CFE to ensure CFE tenants have access to farmer mental health support on offer from that team and that SWN colleagues have access to training on mental health issues in farming.

Recommendation 6: DCC/SWN to undertake review of ingoings/outgoings process in consultation with CFE tenants, alongside the legal process.



Recommendation 7: Within the scope of **Recommendation 1: strategy development**, DCC to consider a structural review of CFE estate holdings including amalgamation, reinvestment of capital into infrastructure and change of farming use where appropriate.

Recommendation 8: Within the scope of **Recommendation 1: strategy development**, DCC/SWN to undertake a review of typical FBT length with view to consider flexibility of existing tenure arrangements in order to meet DCC strategic priorities for the CFE. Examples of greater flexibility might include: lengthening starter FBT to 10 years (with five year break clause), longer FBTs for farm businesses supporting delivery of DCC strategic priorities or lengthening maximum tenure on the CFE in line with retirement of the principal tenancy holder.

Recommendation 9: Within the scope of **Recommendation 1: strategy development**, DCC/SWN to undertake a CFE-wide infrastructure review, determine priority improvements and explore innovative funding mechanisms in order to share the investment liability more equitably between tenant and CFE.

Recommendation 10: Centre for Rural Policy Research (CRPR), University of Exeter to report structural barriers to tenant engagement with capital grant schemes, and engagement with new policy environment more broadly to DEFRA/ Tenant farming commissioner.

Recommendation 11: DCC/SWN to undertake or commission a benchmarking review of estate management practices deployed across other farmed estates in both public and private sector in England. This recommendation arises from our own reflections on data gathered during the course of this study indicating new and emerging thinking around landlord-tenant models that is being developed/deployed in response to the new agricultural policy environment, and which may help to inform DCC/SWN decisions about next steps in enabling a more resilient CFE.

Recommendation 12: DCC/SWN to support development of the different models of environmental farming activity on the estate.

Recommendation 13: Within the scope of **Recommendation 1: strategy development**, DCC to establish environmental ambitions for the estate within CFE strategy to help guide environmental action on CFE and avoid environmental actions being treated as dilapidations. Links fostered with CFE and DCC Environmental Performance Board.

Recommendation 14: Within the scope of **Recommendation 11: benchmarking**, DCC/SWN to explore models of Environmental FBTs to support those tenants who wish to, to take a higher level of environmental action on farm, be compensated for these actions and support the transition of these benefits to the next tenant.

Recommendation 15: DCC to lead estate-wide review of green energy generation potential and feasibility study.

Recommendation 16: Estate-led efforts to encourage regenerative farming practices on the CFE should be permissive (i.e. encouraging those farm businesses interested in pursuing regenerative farming) rather than directive (i.e. imposing management decisions across farm businesses).

Recommendation 17: DCC in conjunction with Devon Food Partnership to lead feasibility study into County Farm Estates' food for County's schools procurement project.



1.0 Introduction

Devon's County Farms Estate (CFE), managed by SouthWest Norse Ltd (SWN), extends to some 3,873 hectares (9,570 acres). The Estate currently comprises 64 fully equipped residential dairy and mixed livestock farms categorised into starter and progression units ranging from 15ha to 122ha, as well as additional parcels of bare ground either let or managed in-hand. The Estate aims to provide people with an entry route into farming but with an expectation that within the short-medium term they secure a tenancy with another landlord and/or acquire their own farm. The farms that comprise the CFE face challenges such as climate change, biodiversity loss, economic pressures, and land-use changes. Although most farms face such challenges, the way in which they manifest, and potential solution pathways, may prove quite different for tenant farmers.

Against this background the aim of this commissioned research is to understand how the CFE can build resilience to the impacts of climate change, socioeconomic pressures and government policy, and how the CFE can maximise future opportunities presented by a changing food and farming sector. More specifically the research aimed to:

- Review the baseline data for the CFE and its tenants.
- Review previous research and learning in the context of the CFE and identify gaps.
- Review national, regional and local policy and strategy in the context of the CFE and explore challenges and opportunities.
- Explore the unique challenges and opportunities for the CFE and what support tenants might need to build resilience and take up opportunities.
- Explore how the CFE and other DCC pilots and programmes can work together to demonstrate and support best practice.



2.0 Research methodology

To meet the objectives of the research a number of approaches were employed including review and analysis of secondary datasets and literature, as well as primary research in the form of an interview survey with a sample of CFE tenants and a workshop with tenants and external speakers.

Policy and data review: A preliminary review of the extant data relating to the Devon County Farms and their tenants and an initial review of policy and strategy documents of local, regional and national importance to Devon County Farms was undertaken to establish gaps within the extant data and help inform questions for the interview survey. The review of the policy landscape and future opportunities for County Farm tenants were used to inform the questions in the interview survey and the structure of this report.

Interviews: Survey questions were designed following insights gathered from the policy and data review and our previous experience of surveys with farm tenants. The questions were agreed with DCC. The DCC CFE is comprised of 64 equipped residential holdings and an additional 35 parcels of bare ground. The original target was to interview 30 tenants (of 99 total residential and bare ground CFE holdings). Ultimately 20 CFE tenants were interviewed (accounting for 17 farm businesses and 22 CFE holdings). This sample represents 27% of residential farms on the CFE. Interview recruitment proved more difficult than originally anticipated for several reasons. First, the period since the government budget in October 2024 has seen widespread anger and protest amongst the farming community in response to proposals for changes to inheritance tax provisions and other policy changes. Our experience elsewhere in the county indicates that it is making interview recruitment more difficult. Second, during the survey period (16 December 2024 to 14 February 2025) there were a number of storms bringing flooding and other damage, making an already difficult life for farmers even harder. Finally, some tenants were reluctant to take part in a survey funded by, and to an extent, about their landlord.

The interviews were conducted via Teams or telephone and consisted of questions designed to gather both quantitative and qualitative data from interviewees. The interviews were recorded (with permission) and then transcribed using an AI transcription tool. Farm businesses were designated an alias (e.g. AB12) with individual participants within that business identified with a lowercase letter (e.g. AB12a).



Table 2. 11 Farm business aliases with no. of tenants interviewed and no. of CFE holdings

Farm business	Tenants Interviewed	CFE holdings
CC03	1	1
HQ32	1	1
EZ89	1	2
TB40	1	1
SV31	1	2
TY28	1	2
AZ27	1	1
BX64	1	1
IN90 (a&b)	2	1
FS96	1	2
BR57	1	2
TL17	1	1
AB44	1	1
DY75 (a&b)	2	1
CU42 (a&b)	2	1
AW13	1	1
GT11	1	1
TOTAL:	17	22

Workshop: The workshop was designed to facilitate a group discussion with tenant farmers, supported by the research team and presentations by three invited speakers who have expertise and experience in helping farmers to adopt a range of innovations to help them build more resilient farm businesses.

The objectives were:

- To explore farmers’ preferred innovation pathways to building more resilient farm businesses, and identify key actions needed to overcome likely challenges and barriers.
- To identify innovations with potential to scale across the Devon CFE, positioning county farms as exemplars of best practice. And identify key actions needed to overcome likely challenges and barriers.

The workshop was held at the Devon Young Farmers Rural Research Hub at Cheriton Bishop, Devon, on 18th February 2025 between 11am and 2pm.

Eight farmers registered for the workshop and there were six participants on the day. Although this was fewer than anticipated, the participants were highly engaged, and the group size enabled inclusive, in-depth discussion which produced some useful insights around potential innovation pathway priorities and support required to overcome barriers and maximising opportunities for both landlord and tenants.

Prior to the commencement of primary data collection this research received a favourable review from the Social Sciences and International Studies Ethics Committee of the Faculty of Humanities, Arts and Social Science of the University of Exeter. All participants were fully briefed about the research and gave informed consent to participate.



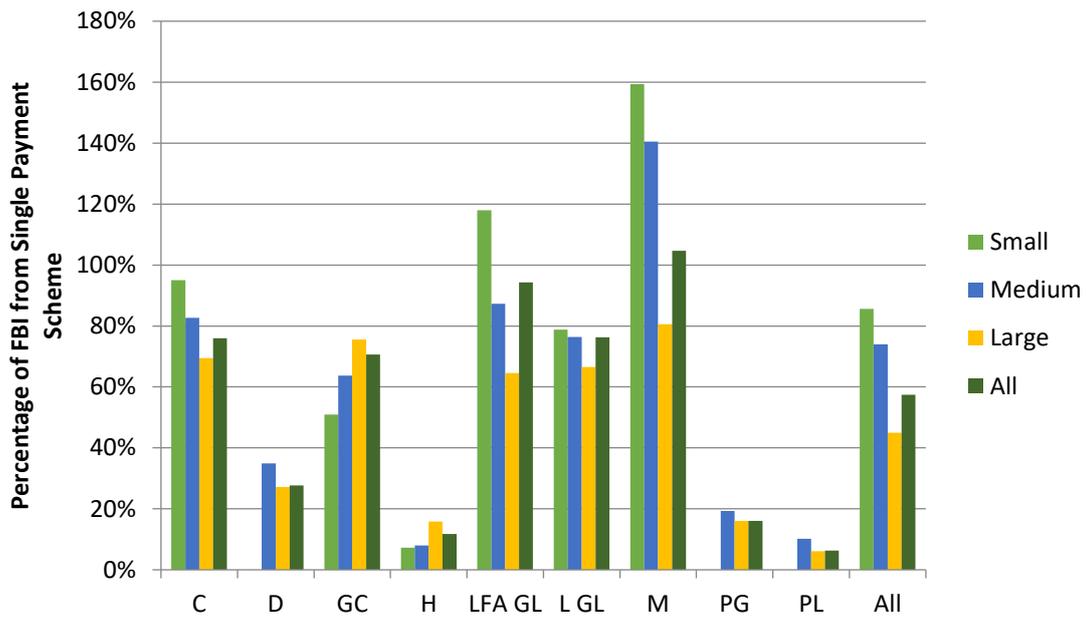
3.0 Current and emerging operating landscape for tenant farmers

This section of the report considers the broad policy context in which DCC tenants are operating including, where appropriate, some consideration of technical and market developments. The main objective is to identify the threats and opportunities facing tenants particularly in the context of the need for tenants to make an acceptable level of income. We start by looking at national farm income trends and then examine the three main sources of farm income ('cost centres' in Defra terminology) of agriculture, agri-environment and diversification. Across these three areas of activity is the potential need for support and advice and this is covered in the next section.

3.1 Farm Income

This report is produced at a time of rapid policy change. Most fundamental of all is the demise of the Basic Payment Scheme (BPS) or Single Farm Payment which had given all eligible farmers an area-based payment subject only to modest cross-compliance conditions. Under the EU's Common Agricultural Policy, these payments provided a considerable proportion of farm income as shown in Figure 3.1. The payments were retained for a period following Brexit but subject to annual reductions from 2021 prior to being replaced in 2024 by delinked payments. The delinked payments in 2025, subject to parliamentary approval, will be radically reduced so that in practice the maximum delinked payment amount payable to any farm in 2025 will be £7,200. There are expected to be further reductions in 2026 and 2027 with 2027 being the last year of payments. In 2023/24 across all farm types the average net payment in England received was £18,300, 21% lower than 2022/23 but still accounting for around 40% of Farm Business Income as shown in Figure 3.2 (Defra 2024). However, as shown in Figure 3.2, there is considerable variability according to farm type with cereals, livestock and mixed farms particularly vulnerable to the demise of BPS. Approximately 36% of Devon CFE tenants are dairy farms which in the national Defra sample derive 25% of income from BPS. The remainder of Devon CFE tenants are classified as mixed though in reality, using the Defra classification, some of these are likely to be livestock or cropping farms. It is possible that the dependence of DCC tenants on BPS is even greater than these figures indicate due to the limitations on agri-environment and diversification income as a result of short-term tenancies.

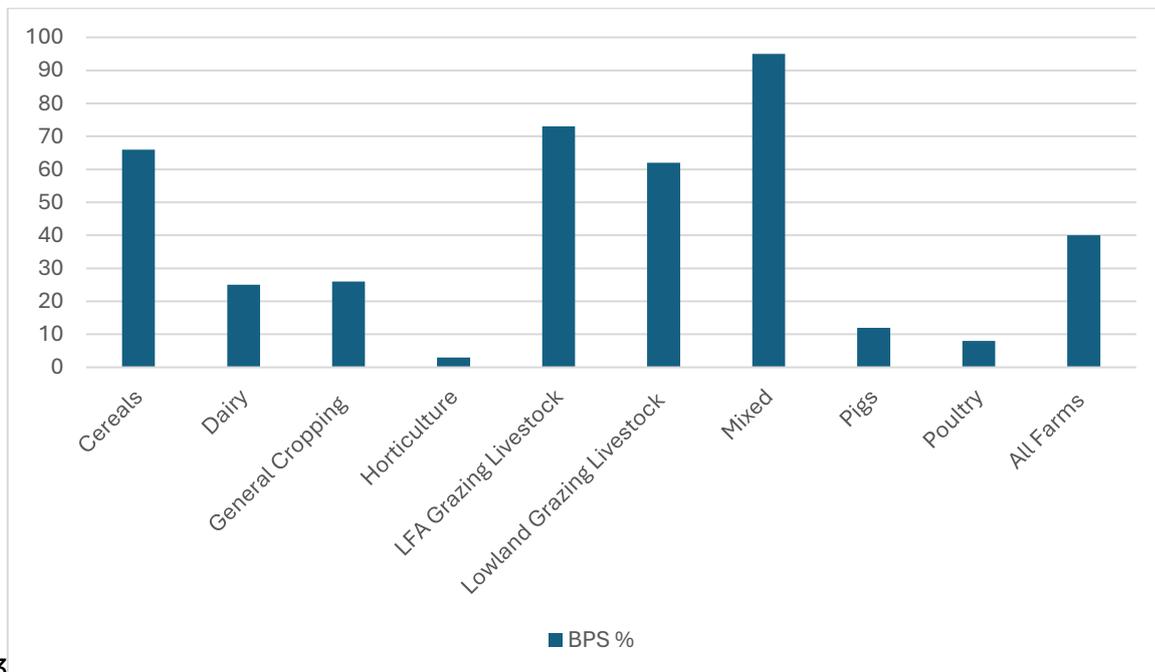
Consequently, the most important question facing Devon CFE tenants, and indeed most farmers, at the current time is plugging the income gap left by the end of BPS. Successive Governments since the Brexit referendum have emphasised three ways forward for farmers in this challenging context: improving their agricultural income through efficiency and performance gains, participation in agri-environment payment schemes, and diversification and we now look to each of these in turn, recognising, of course, there is some overlap. For example, under agri-environment schemes although the purpose of the payments is to support environmental benefits, there may be additional agricultural benefits, such as under the herbal ley payments under SFI.



1

Figure 3. 2 Percentage of Farm Business Income derived from Single Farm Payment, by Farm Type and Farm Size, England and Wales 2014-15

Key to farm types: C=Cereals; D=Dairy; GC=General Cropping; H=Horticulture; LFA GL=Less Favoured Area Grazing Livestock; L GL=Lowland Grazing Livestock; M=Mixed; PG=Pigs; PL=Poultry. Size: Based upon Standard Labour Requirements (SLR). Small=<2 SLR; Medium=2-<3SLR; Large=3SLR or greater. (Source: Wilson 2016 in Winter and Lobley 2016).



3

Figure 3. 4 Percentage of Farm Business Income derived from Basic Payment Scheme by Farm Type, England 2023-24 (Source: DEFRA, 2024).



3.2 Agricultural Income

Defra figures for England show that in 2023/24 agricultural income contributed negatively to farm business income due to an average agricultural cost centre loss of £2,700. This compares to agriculture accounting for 6% of farm business income in 2014/15. These data mask considerable variation between farm types with agriculture providing nearly a half (49%) of dairy farm income compared to substantial losses on cereals, mixed and livestock farms. The aggregated data also hide very different levels of economic performance. Farm Business Survey data have long illustrated a striking degree of heterogeneity in farm business economic performance unparalleled in other economic sectors (Wilson et al 2013). The fact that some farmers with poor economic performance survive alongside better performing neighbours is largely a consequence of the importance of land as a non-reproducible asset in farm production. Better performing farmers cannot simply take over from poorer performing farms unless they can access their land. Moreover, farms who pay no rent or have no mortgage on their land are able to withstand lower returns than those with a rent or rent equivalent pay. Moreover, there is little doubt that the BPS served to insulate farming from the consequences of under-performance and consequently the imperative to address the challenges is now very clear, especially for tenants. It is important to emphasise that we are not suggesting that Devon CFE tenants are necessarily under-performing. We do not have the data to support or refute any such claim. However, it is likely that rents and, to some extent, short-term tenancies encourage high performance in the short term as farmers work hard and deploy good management practises as they seek to ensure returns that are high enough to pay the rent and provide farm income. However, in the longer-term investment might not be high enough to ensure sustained performance.

So, what are the factors that might encourage high performance especially in the context of the demise of BPS? In work on farm financial performance and business management practices by Vanhuyse et al (2021), the variable that had most influence on financial performance (both profitability and financial efficiency) was increasing farm size:

.... if financial performance of farm businesses is to be maximised, farmers should try to achieve economies of scale through increasing the size of their business. This may not necessarily be about buying or renting more land, An alternative approach is through collaboration with other farmers in terms of pooling and sharing resources such as the labour, machinery and fixed capital already invested. (Vanhuyse et al 2021: 427)

The research also showed that formal planning, cash flow planning, and benchmarking all had positive effects on profitability with the authors recommending policy to focus on:

the role of wider industry and how it can better meet the needs of farmers. Responding to new knowledge is essential in innovating and improving both financial and technical performance. Whilst there is a role for the farmers themselves in this, there is also a role for industry organisations and rural professionals in determining how best for the farming population to acquire knowledge to improve both profitability and financial efficiency of farm businesses. The emphasis should be on designing appropriate mechanisms to encourage the adoption of management practices. (Vanhuyse et al 2021: 427)

This emphasis on financial business management is important but has received far less attention than agricultural management and it is to that we now turn. A number of factors have contributed



to a significant up-turn in thinking on farming systems in recent years with advocacy of lower inputs of fertilizers and pesticides linked to the need to both lower costs to farmers and to improve environmental performance with regard to nutrients, soil health, biodiversity, carbon storage and climate change. Terms such as agroecology and regenerative farming have come to the fore offering avenues for farmers to pursue with regard to improved soil management, cropping practices, and so forth. Conferences and reports advocating these approaches abound. However, a major problem for farmers confronting these is how to disentangle the competing drivers of these approaches. Many farmers are concerned about climate change and biodiversity recovery, but they are running businesses which need to turn a profit. If evidence is not presented with that in mind it makes it hard for farmers to make decisions on the adoption of new techniques. To give an instance of this, one of the main reports on agroecology was commissioned by the Committee on Climate Change to assess the role of agroecological farming in the UK in the transition to Net Zero (Albanito et al 2022). It is a very useful report, and inferences can be made on the possible farm business economic implications of the farming practices it reviews but that is not its main purposes. The word 'profitability' appears once in the text, 'income' and 'gross margin' not at all. Another key paper looks at how functional agro-biodiversity measures help to realise biodiversity, climate neutrality, efficiency in use of natural resources and the circular economy (Maskell et al 2023) but not farm profitability. Very few attempts have been made to incorporate economic variables systematically into analysis of agroecological/ regenerative farming systems/techniques (and one of the few exceptions is for Mediterranean not Temperate climates: Musto et al 2023). This lack of data has clear implications for advice and support dealt with in section 6.

It is the case that a number of regenerative techniques, in contrast to wholesale systemic change, may offer potential cost saving on-farm innovations. Some of these are available for grant aid under the Sustainable Farming Incentive Scheme (SFI) covered in more detail in the next section. For example, amongst the SFI actions eligible for grant support are the establishment of herbal leys, soil management plans, no-till farming, legume fallow, legumes on improved grassland, mechanical or non-mechanical robotic weeding, camera or remote sensor guided herbicide spraying. In November 2024 the main capital grant offer was temporarily closed to new applications but was reopened on for 2025-26 on the 25th February 2025.

Maskell et al (2023; see also Maskell et al 2020) assessed the strength of evidence of how agro-biodiversity measures might impact a range of land management outcomes including yields, against a scale of Strong evidence, intermediate evidence, weak evidence and no evidence. The evidence for yields and one of the other outcomes, biodiversity, is reproduced in Table 3.1 below.



Table 3. 1 Evidence on Impacts (source: Maskell et al., 2023)

	Yield	Biodiversity
1. Conservation Tillage Techniques	INTERMEDIATE	INTERMEDIATE
2. Mixed Crops and Crop Rotations	INTERMEDIATE	INTERMEDIATE
3. Sward Diversity	INTERMEDIATE	STRONG
4. Cover and Catch Crops, including Legumes	INTERMEDIATE	INTERMEDIATE
5. Modified Manure Management	STRONG	No evidence
6. Organic Inputs: Biochar and Organic Matter Inputs, including Biosolids	STRONG	INTERMEDIATE
7. Agroforestry	INTERMEDIATE	STRONG
8. Hedgerow Management	WEAK	STRONG
9. Field Margin Management	WEAK	STRONG
10. Reduction in Use of Plant Protection Products	WEAK	STRONG
11. Semi-Natural Landscape Elements and Landscape Context	INTERMEDIATE	INTERMEDIATE

It is important to caveat what we are saying here – this is *one* group of scientists looking at *selected* measures and the assessment was undertaken in 2019. There will have been more scientific work undertaken subsequently. Nonetheless the underlying message is unlikely to have changed significantly in the intervening period, namely that some measures which are frequently recommended to farmers (7,8,9,10) are supported by stronger evidence for biodiversity benefits than for yields.

In addition to the agricultural measures promoted under SFI, there are Government policies in support of improving agricultural productivity and these have received more emphasis in recent times partly in response to global geopolitical uncertainties but the public monies available are dwarfed by agri-environmental finances. For example, the ADOPT (accelerating development of practices and technologies) funds is to be launched this Spring. Originally, announced in November 2023 with a £44 million budget to test and trial new technology and techniques on farms, the scheme was put on hold by the new Labour government. On the 25th February, Defra (2025a) announced new grants as follows:

The Farming Equipment and Technology Fund (FETF)

FETF offers grants for equipment, technology and small infrastructure to boost productivity, improve slurry management and enhance animal health and welfare.

Over the past 3 rounds of FETF, farmers, growers, foresters and other contractors in England have received over £107 million to buy new equipment and technology.

This spring, we will launch one round of FETF. Grants of between £1,000 and £25,000 will be available.



In total, £30 million will be available for productivity and slurry and £16.7 million will be available for animal health and welfare.

The Farming Innovation Programme (FIP)

Through FIP, funding is available to farmers, growers and foresters who want to develop and use new, innovative methods and technologies.

- A thematic competition that builds on the opportunities unlocked by the Genetic Technology (Precision Breeding) Act 2023, with up to £12.5 million available to fund research to deliver the practical benefits of precision breeding technology to farmers. For example, enhanced disease resistance or reducing the need for nutrients or pesticides.
- A thematic competition focused on Net Zero farming with up to £12.5 million across projects to fund research focusing on technologies and practices to help transition the sector towards Net Zero.
- Further Industry-led competitions with up to £17.6 million across projects. These will range from early-stage feasibility to those at a later stage in the R&D pipeline towards commercialisation.

Through FIP, we've invested £51.8 million to date, with an additional £98 million committed to ongoing projects advancing agri-technology research.

This funding has supported innovative trials, such as the use of semi-transparent solar panels in glasshouses and polytunnels. This allows sunlight to reach plants, enhancing growth and generates clean energy, contributing to sustainable farming practices.

In addition, the funding has enabled research into the use of daffodil extract in cattle feed. This natural additive could help reduce methane emissions from cows, which would represent a significant step toward lowering methane emissions and the environmental impact of livestock farming.

Accelerating Development of Practices and Technologies Fund (ADOPT)

ADOPT provides collaborative farmer-led, innovation grants, for farmers and farm businesses to trial new technology and methods on their farm.

These practical research projects will help to prove innovative ways of boosting farm productivity, food security and nature's recovery across England.

It will open for applications in spring 2025 and grants will be available to fund projects of between £50,000 to £100,000 in size.

To ensure farmers and growers can access ADOPT and the evidence generated effectively, we have established a bespoke Support Hub to support farmers in their application and encourage collaboration.

The hub will be led by [RSK ADAS](#) with support from the [UK Agri Tech Centre](#) and [Soil Association](#).



Through the FIP and ADOPT competitions, we are making up to £63 million available starting in the 2025/26 financial year.

Agri-tech developments have been shown to offer potential to increase performance. In its overview of the sector, the Devon Agri-Tech Accelerator (DATA) Project (Liu et al 2022) identifies both small farm size and high costs as inhibiting factors to adoption of techniques in a Devon context.

Speaking to farmers and landowners at the Oxford Farming Conference in January 2025, the Defra Secretary of State announced a series of reforms, delivering on the Government's New Deal for Farmers including:

- “Backing British produce: For the first time ever, the Government will monitor food currently bought in the public sector and where it is bought from. This is a significant first step to deliver on a manifesto pledge and make it easier for British farmers to win a share of the £5 billion spent each year on public sector catering contracts.
- Using planning reforms to support food production: Ensuring our reforms make it quicker for farmers to build the buildings, barns and other infrastructure they need on their farms to boost food production.
- Diversifying income streams: Helping farmers make additional money from selling surplus energy from solar panels and wind turbines by accelerating connections to the grid and support them during difficult harvests and supply shocks.
- A fair supply chain: Boosting profitability through fair competition across the supply chain. New rules for the pig sector will come this spring, ensuring contracts clearly set out expectations and changes can only be made if agreed by all parties. Similar regulations for eggs and fresh produce sectors will follow with the government ready to intervene with other sectors if needed.
- Protecting farmers in trade deals: The government will uphold and protect our high environmental and animal welfare standards in future trade deals”.

Source: Defra 2025b.

3.3 Agri-environment Payments

Defra figures for England show that in 2023/24 agri-environment income accounted for 23% of farm business income compared to 15% in 2014/15. In short, nearly ten years of emphasis on public money for public goods has shifted the dial in the desired direction but only to a modest extent. This is not the place to analyse the reasons for the relatively low pace of change, rather we need to examine the policies and opportunities in place and consider likely future developments.

This is a complicated space encompassing three main areas of activity relevant to farmers: Government Environment & Land Management Schemes (ELMS), market schemes and the broader national and especially local policy context. Farmers have a long familiarity with the first of these, much less with the other two.

Environment & Land Management Schemes (ELMs)



The Sustainable Farming Incentive (SFI) scheme pays farmers and land managers to take up or maintain sustainable farming and land management practices (actions) that:

- protect and benefit the environment
- support food production
- improve productivity

Depending on eligibility, farmers can apply for up to 102 SFI actions with agreements lasting from three to five years, depending on which SFI actions is selected. This makes SFI potentially much more relevant to tenants than longer term schemes.

Countryside Stewardship Mid Tier is now closed but equivalent grants are available as actions under SFI.

Countryside Stewardship Higher Tier (CSHT), a follow-up to Higher Level Stewardship, opens in Summer 2025 to reward farmers and land managers who manage land in a way that:

- protects, restores or enhances the environment
- mitigates the effects of climate change

CSHT can be done on woodland, farmed land, land managed for nature or a combination of these. This includes important environmental or historic sites, such as:

- sites of special scientific interest (SSSIs)
- commons
- woodlands
- scheduled monuments

CSHT is restricted to those invited by Natural England or the Forestry Commission (or both) who are now providing relevant pre-application advice to enable invited farmers and land managers to prepare an application.

In addition, there are grants for capital items to help carry out management actions.

Finally in this section there is a range of possibilities for farmers wishing to plant trees. More details are provided in Appendix A but the key ones of potential relevance to the County Farm Estate tenants are:

Woodland Creation Planning Grant (WCPG) which provides funding to prepare a Woodland Creation Design Plan, which is UK Forestry Standard (UKFS) compliant with a minimum area of 5 hectares.

England Woodland Creation Offer (EWCO), the main grant scheme for farmers and land managers to encourage investment in woodland creation with a minimum planting area of 1 hectare.

Woodland Carbon Guarantee (WCaG) is an incentive scheme to help accelerate woodland planting rates across England to mitigate for the effects of climate change. These new woodlands will permanently remove carbon dioxide (CO₂) from the atmosphere. The scheme is operated through



periodic auctions. The WCaG provides the option to sell captured CO₂ to the government for a guaranteed price every five or ten years up to 2055/56, which provides an additional long-term income from woodland. Alternatively, CO₂ can be sold on the open market. WCaG applications can be made alongside applications for woodland creation grants.

Woodland or tree planting schemes are a very significant element in current policy thinking (Defra 2025d), but there are significant difficulties faced by tenants with regard to woodland schemes. Research for the Forestry Commission identify six main barriers facing tenants contemplating tree planting:

- **Legal:** Tenancy agreements often explicitly preclude tree planting or do so indirectly by requiring land to be used for agriculture. However, there are several grey areas, including how and when trees do or do not count as 'agriculture'.
- **Temporal:** Tenancy lengths tend to be short, limiting tenant farmers' ability to plan on the timescales required for trees and meaning that they face a challenge to achieve a return on investment from trees. Further, as trees are a 'permanent' land use change, growing trees may restrict future land use options.
- **Economic:** It is difficult to ensure both tenant and landlord can benefit financially from trees. Further, uncertain compensation arrangements mean one party risk being required to recompense the other at the termination of a tenancy.
- **Complexity:** Tenancy agreements are complex, and the time and cost entailed in the renegotiation required to permit tree planting can be a barrier.
- **Values, tradition, and identity:** There can be a tension between how tenants and landlords see their roles and land management objectives. Trees are often seen as the landlord's domain and not what farmers do, and tenants may lack experience of woodland management.

Source: McConnachie et al 2023.

The main opportunity at present is with regard to carbon offsetting. A number of investment companies act as intermediaries between companies with offsetting requirements and potential providers of carbon offsetting, of which land managers are particularly important. Building on-farm carbon stocks, which can be sold into voluntary carbon markets may be an additional income sources for farmers. This remains a very complex area. The AHDB has useful material for farmers on its website and the North Devon Biosphere has set up a natural capital marketplace to assist farmers negotiate the complexities of carbon credits and BNG. Probably the most developed scheme relates to the Woodland Carbon Code (WCC), the UK's voluntary carbon standard for woodland creation projects which facilitates the sale of the carbon sequestered in woodland in the form of Woodland Carbon Units.

One of the inevitable drawbacks for tenants is the long-term nature of most of the agreements on offer, typically upwards of 25 or 30 years. Moreover, in some cases owner-occupation is assumed as, for example, in the Environment Bank BNG Habitat Bank scheme.

Local Policy Framework

Responsible authorities, in Devon's case DCC, are responsible for the development and delivery of Local Nature Recovery Strategies (LNRS) to include a map and description of the area and its



wildlife habitats and species, a set of priorities agreed for the county and actions needed to achieve these priorities and also achieve other socio/economic priorities such as food control, clean water, improved health and wellbeing and carbon sequestration (through nature based solutions). Devon's LNRS is still in development but should be out for public consultation soon. It is building on other strategies such as Devon's Carbon Plan and the Trees and Woodland Strategy.

The extent to which farmers will be directly affected by LNRSs is still not entirely clear. Recent Defra guidance to farmers reads as follows:

LNRSs won't require you to change how you use your land or restrict development. They provide information to help you decide how to manage your land and make informed choices.

Likewise, if you want to do nature conservation work in an area that isn't prioritised in the LNRS, you still can – LNRSs won't prevent this and funding for nature recovery activities won't only be available for areas mapped in an LNRS.

The types of actions that LNRSs propose are intended to play an important role in meeting the government's targets and commitments for recovering nature and improving the environment. The government must track and report progress on these targets to determine where to focus efforts.

You can use LNRSs to help identify which environmental land management activities are most appropriate for your land and to see where there are opportunities for working with other land managers on landscape-scale nature recovery.

In future, LNRSs will help government when considering applications for funding specific nature recovery activities, by acting as criteria in applications for some schemes. LNRSs will also guide and incentivise landowners to create or enhance habitats for biodiversity net gain.

Source: Defra 2025c

[3.4 Diversification](#)

Defra figures for England show that in 2023/24 diversification income accounted for 42% of farm business income compared to 22% in 2014/15. The types of diversification covered in these data and some trends over time are shown in Figure 3.3. What is striking is how little growth over the last ten years there has been in all forms of diversification with the exception of renewable energy.

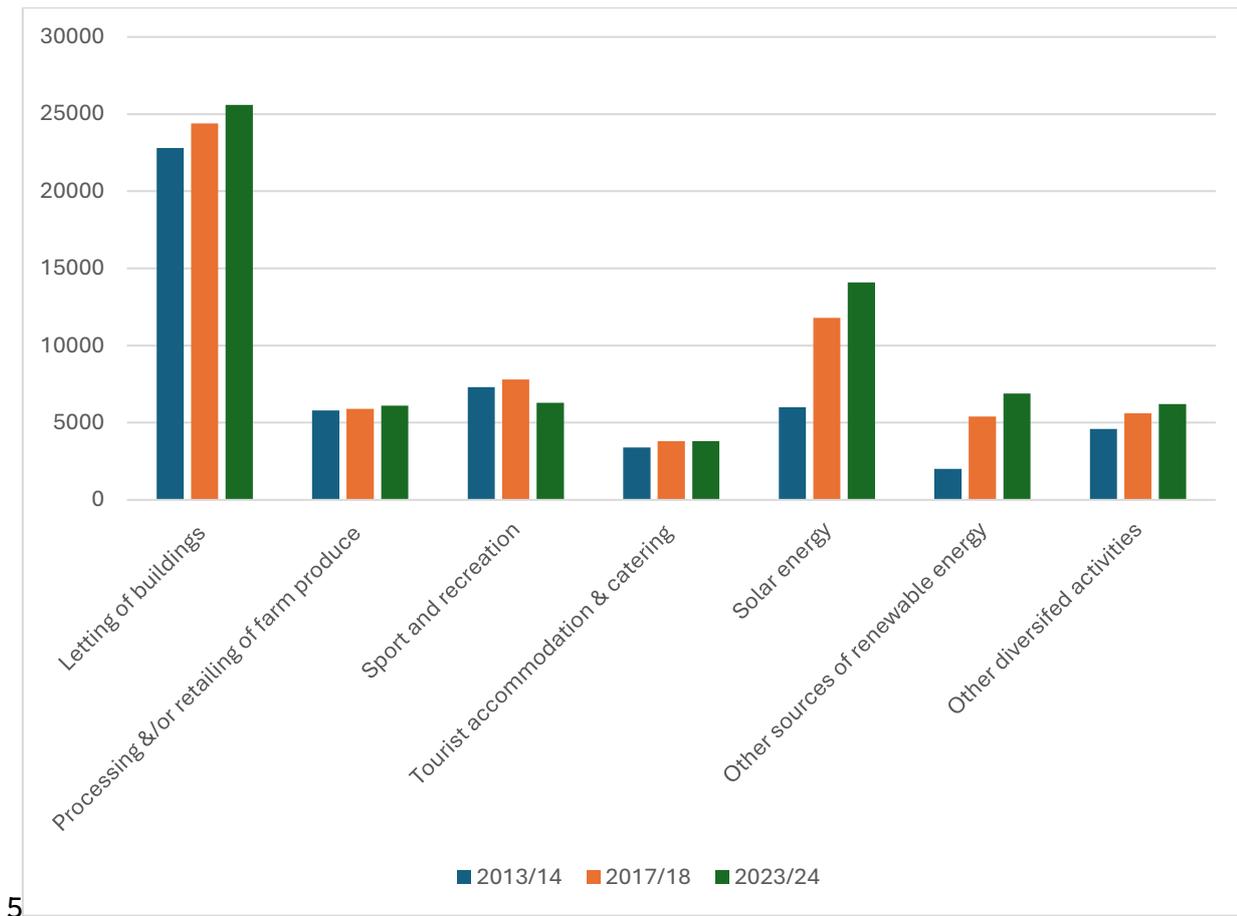


Figure 3. 6 Number of Farms in England with Diversified Activities (Source: data-sets linked to Defra 2024) NB. Some farms may have more than one diversified activity.

3.5 Advice and Support

In 2022 Devon Local Nature Partnership commissioned a study of advisory provision in Devon which identified 65 organisations that provide advice to farmers in Devon and a total of 147 individual advisers active in the county (Deane 2022). The consultants made a number of recommendations that are worth repeating here, not least because little has yet been taken forward to date:

Long term strategic goals, clearly communicated

There is a need to establish a co-ordinated set of priorities for farm advice on climate and nature in Devon that can be adopted by advisers and communicated to farmers. This will need to be a partnership effort involving the public, private and voluntary sectors but is one that the County Council is probably best placed to lead. Critically, there should be a seamless join between the Devon Carbon Plan and the Devon, Plymouth and Torbay Local Nature Recovery Strategy.

Developing a proactive approach – the journey

A range of opportunities has been identified by this study, from a unified scheme of direct farm advice on climate and nature issues to a local programme of training. Decisions should



be taken on which can be taken forward immediately, including in collaboration with other proposed work, and which should be considered for future development.

First-stop-shop

There is strong support for the principle of a single gateway to co-ordinated advice from farmers and advisers. We make three suggestions below, however further analysis will be needed on costs, leadership, geography and integration with existing schemes.

We do not recommend establishing a new organisation to provide advice directly to farmers at this stage. There are already a number of well-established and trusted organisations leading public good advice in the County and a plurality of (well networked) providers provide strength in depth.

Instead, we propose that a referral hub is established, working closely with the Future Farming Resilience Programme scheme providers and HotSW Growth Hub. This will ensure that farmers who are currently unsure of where to go for advice are able to get simple signposting appropriate to their needs. While this triage service must take account of farmers' own identified needs, it must also ensure that up to date and specialist advice on climate and nature is proactively offered to farmers.

To support this, and in any case, we recommend the immediate creation of a 'register of advisers'. This can be available online – to farmers and advisers – and will use a principle of 'fair access' for advice providers.

A supported network

To improve the co-ordination of advice and the sharing of information amongst advisers, we recommend supporting an informal network of advisors. This could be achieved by contracting one of the existing advisory bodies or by taking on a new part-time position (who could also undertake other roles such as managing a register of advisers, or maintaining a knowledge base). Again, this should adopt the principle of 'fair access' for advisers from all sectors (commercial, not-for-profit and public) and welcoming new and unconventional voices.

Improving the knowledge base – especially on GHG emissions

We recommend setting up a shared, online, up-to-date evidence base that makes the latest results from research and best practice available to farmers in a tailored and economically realistic manner. Until more detailed and sophisticated material is available nationally, Devon should draw on existing best practice to produce a checklist of advice on GHG emissions, emphasising the economic benefits to farmers. An example of a good information resource, suggesting management options and their costs, is the interactive web tool developed for Farming Connect in Wales: Reducing GHG emissions | Farming Connect (gov.wales).

Improving the quality of advisers

There are three elements to this suggestion:



Training and recruitment of future farm advisers. There needs to be proactive engagement with FE colleges in Devon and the wider region, and with the larger advisory organisations and landowners to bring forward a new cadre of farm advisers. This should include short courses, apprenticeships and work experience.

Continuing Professional Development. Proactive planning is needed by the larger not-for-profit advisory organisations to coordinate a programme of Continuous Professional Development events for farm advisers in Devon and encourage take up of training opportunities.

Knowledge transfer from research. Proactive steps should be taken to develop a pathway for co-innovation and knowledge transfer with bodies leading research on GHG emissions and nature conservation in the region SW (Exeter, Plymouth, Duchy etc). This should ensure that research is appropriate to the needs of the land-based sectors and the results are communicated to maximise their uptake.

Getting best value from the public providers

Assuming the bids to Defra from DCC and PCF for the 'scale-up' phase of the Future Farming Resilience Programme are successful, these projects, along with Devon Trading Standards and the Growth Hub, will be critical. It is essential that the full potential benefits of these projects are fulfilled. We make three suggestions:

that all these bodies ensure that advice on climate and nature is actively promoted to participating farmers, rather than simply responding to the needs identified by farmers themselves.

that they actively seek involvement from stakeholders, creating steering groups to provide guidance and accountability, and

that they are fully aware of the range of specialist farm advisers – using them to provide comprehensive and rounded advice to farmer.

Co-ordination at a sub-regional scale

There are clear benefits from driving farm advice at a larger scale than Devon. The economics of provision would mean that overhead costs could be shared; knowledge and experience could be shared with other places; and a level playing field could be established – especially in areas that cross county boundaries (Upstream Thinking, the Future Farm Resilience Programme, Exmoor National Park, Tamar Valley and Blackdown Hills AONBs, etc).

We recommend creating a farm advice network at the Great South West geography – as it offers greater scale and an existing set of structures and strategies.



4.0 Core offer of County Farm Estates

4.1 History of CFEs, their role and purpose

Although CFEs were established in the late nineteenth century, arguably it was the 1947 Agricultural Act and the postwar drive for food security from which our current understanding of the purpose of the CFE emerged. The 1947 Act embedded the social purpose of the CFE as the first step on the farming ladder for new entrants, an opportunity for young people without access to land or capital to enter into agriculture before progressing off the CFE into the private tenanted sector (Prince, 2012). Holdings were indeed small; the act stipulated that farms were expected not to exceed a maximum of 75 acres (UK Gov, 1947, s. 66). However, the postwar agricultural landscape more broadly saw a decline in the percentage of tenanted land, following the provision for security of tenure for tenant farmers within the Agriculture Act 1947 and the Agricultural Holdings Act 1948 (Winter, 1996). The disconnect between the provisions for CFEs within the 1947 Act and progression opportunities within the wider agricultural sector led the 1966 Wise Committee to review the expectations for CFEs arguing that they, ‘should be thought of as a ‘gateway’ to farming through which only the best young farmers may enter, rather than as part of the farming ladder,’ (Wise Committee, 1966 quoted by Prince, 2012, p. 3). This change of emphasis was reflected in the Agriculture Act 1970, which enabled the amalgamation of smallholdings to create larger, more viable farm businesses defined as, ‘providing full-time employment for not more than two men,’ rather than by size (UK Gov, 1970, s. 39).

The 1970s marked the beginning of the decline in acreage of CFEs across Britain (CRPE, 2019). Lord Curry’s (2008) Government commissioned review urged Local Authorities to support, retain and enhance their CFE offer. Again, the tension between providing an opportunity for new entrant tenants and the availability of transitional opportunities was explored but the Curry Review also called for more holistic management of CFEs by Local Authorities:

“It is not sufficient to only offer opportunities for new entrants to come into the industry if they cannot then make the transition on to larger holdings in the public or private sectors. A much more integrated approach needs to be taken between Local Authorities and the private sector to ensure transition by working with organisations such as Fresh Start and English Farming and Food Partnerships to increase the opportunities available for Local Authority tenants. More active management within estates could help create business development opportunities for tenants both inside and outside Local Authority ownership.” (Curry, 2008, p. 5)

In urging for a more integrated management approach towards CFEs, the Curry Review pointed to the range of benefits CFEs could deliver across council priority areas including ‘renewable energy, waste utilisation, local food, re-connection with the urban population, access to the countryside, learning outside the classroom, planning policies, greenbelt management and assisting in the management of flood risk,’ (Curry, 2008, p. 9).

The austerity politics of the 2010s, was however to usher in another wave of CFE sell offs in England, with a 7% decline in the area of CFE between 2010 and 2018 (Graham et. al, 2019, p. 7). By the time of the Graham et. al’s (2019) independent review those councils still in possession of CFE holdings were found, in general, not to have pursued the ambitions of the Curry Review; generally they did not procure from CFE in any meaningful way and environmental farming practice was not strongly



weighted within tenancy applications. Councils were, however, found to be supporting care farming initiatives and school visits on their CFE (Graham et. al, 2019). Graham et. al (2019) recommended that councils explore the capacity for their CFEs to be multifunctional sites with multiple benefits, suggesting holdings near cities be restructured to provide horticultural units or provide fresh produce for local public sector supply chains, for example. A follow-up Strategy led by the New Economics Foundation (2022) again urged councils to ‘use their convening power,’ to establish collaborative networks, enable knowledge exchange and forms of joint working and join up their tenants with other local networks such as schools, health, business and community groups to mutual benefit. In particular, they urged councils to act to increase the numbers and diversity of new entrants to council farmland and of access-routes and progression opportunities to work, develop new integrated strategies for their farm estates and strengthen council farms’ position and connectivity in local and high-value markets (NEF et. al, 2022).

4.2 Historic and current strategy for Devon CFE

The last substantive strategy review for the Devon CFE was held in 2010, in the wake of the Curry Review (2008). The publication of the Nitrate Pollution Prevention Regulations 2008 had also prompted the need for additional capital funding support from DCC to fund new, compliant infrastructure on the estate, hastening the need for a review (DCC, 2010, p. 6). The review reaffirmed the importance of the estate as an opportunity for new entrant farmers or land-based ‘entrepreneurs’, an asset for the people of Devon and a source of revenue for DCC. Specifically, the review recommended that:

- A long-term management plan setting out a strategy for perhaps the next 25 years subject to periodic reviews, should be agreed
 - Farms must be provided with appropriate infrastructure supported by ongoing reinvestment... in the short, medium and long term.
 - Tenants to be given opportunities to excel
 - The Estate service must deliver the County Council’s corporate aims
 - The Estate should become a resource to support the delivery of education throughout Devon
 - The Estate should embrace technical excellence and support agricultural research to meet 21st Century challenges
 - Opportunities for environmentally positive projects should be provided
 - Tenants should be encouraged to consider and develop farm projects that support social inclusion
- (DCC, 2010 pp. 7-8)

In order to meet these ambitions, it was recommended that an asset management plan, lettings policy and CFE strategy be developed. The latter document was attached as an appendix to the 2010 review and established the maximum term of 25 years which is still in operation on the CFE as well as establishing current typical starter and progression FBT lengths and recommendations for extensions. In addition, the 2010 review proposed that 100% of future receipts from the sales of farms including farm buildings should be retained by the Estate in order to reinvest in infrastructure. Potential future focused infrastructure projects were discussed including methane capture, anaerobic digestors, mineral harvesting and green electricity generation on the CFE.



Recent strategic documents published by DCC and its partners have indicated ongoing ambitions for integrated, collaborative projects to be pursued on the CFE.

The Climate Adaptation Strategy for Devon, Cornwall, and Isles of Scilly (2023 – 2027) identifies opportunities to mitigate climate impacts which require, or which would benefit from, regional partnership working. Although this strategy does not specifically mention the CFE it does identify a series of actions for, and relating to, farm businesses, these include:

- NEB5 Adapt agricultural land use through Environmental Land Management Scheme (ELMs) and Biodiversity Net Gain funding (e.g. buffer strips, conservation areas etc.).
- NEB6 Develop alternative water supplies (e.g. boreholes) and use of rainwater harvesting and storage (ponds/reservoirs) on farm. Put in ponds, swales, and wetlands.
- NEA1 Water management strategy / NEA4 Carbon Management strategy / NEA5 Nature Recovery Strategy
- NEC2 Facilitate landowners connecting with local nature groups

The Devon Carbon plan (2022) developed by DCC and its partners indicates the actions needed to be taken within the county in order for Devon to reach net zero. Actions relating to the CFE include:

- F10. Explore how the County farms estate could be used to demonstrate low-carbon agriculture.
- F7. Look to set-up a Devon Farm Advice Service.
- F8. Support development of on-farm anaerobic digestion of agricultural wastes.
- F9. Support the testing and adoption of low-carbon agricultural practices

During the development of the carbon plan, it was acknowledged that for the CFE to play a role in demonstrating low carbon agriculture there would need to be external capital investment made on the estate. This is noted in an update on Devon Interim Carbon Plan to the Farms Estate Committee (2021):

- Volunteer the Estate resource as an opportunity for the Climate Emergency Partners to trial and demonstrate potential best practices and innovations in farming designed to reduce the emissions from agricultural activities and/or to sequester more carbon. It is noted however that in order to deliver best practice demonstration trials, additional external capital investment will be required, as identified in the Interim Devon Carbon Plan itself. (Parkhouse, 2021)

This interim report also noted that training, signposting and events for tenants to share best practice would be needed. However, by the publication of the final Devon Carbon plan (2022), the resource identified for the delivery of best practice low-carbon agriculture on the CFE was reduced to identifying the new ELMs and carbon markets as potential sources of funding.

The Devon Food Partnership produced Devon's Good Food Strategy (2023 – 2028) in order to provide strategic leadership towards whole system change across the county's food and farming sectors, with the aim of ensuring healthy, sustainable and affordable food is accessible to all. Relevant actions for the CFE include:

- 6.4 Use the county farms estate to demonstrate best practice



Additional actions with the Good Food strategy to support Devon's farmers include:

- 4.1 Promote buying locally produced food from local businesses
- 4.2 Work with initiatives that support local food businesses, including Future Farming Resilience and the Heart of the South West Growth Hub
- 4.3 Continue to support farmers on the journey to carbon neutrality and increased biodiversity
- 5.2 Support organisations that improve access to market for smaller SME farmers, growers and food manufacturers
- 6.1 Support farmers and fishers through the transition to more sustainable practices through high quality, well-coordinated advice provision
- 6.3 Help farm businesses achieve a fair price for sustainably produced goods by promoting access to local, premium, and natural capital markets

5.0 Current profile of holdings and tenancies DCFE

Of the 64 equipped residential holdings and 35 bare ground parcels let by DCC via SWN, the majority of these holdings are classified as mixed holdings (see Table 5.1). However, there is an uneven distribution of holdings across farm use types with the majority of farms let on progression FBTs designated for dairy use, and the majority of starter farms designated as mixed use farms (see Table 5.1).

Table 5. 1 types of holding on the CFE by tenure and use type

	Dairy	Mixed	No use type	Total holdings
Starter	9	24		
Progression	24	6		
Other tenure	2	31	3	
Total:	35	61	3	99

The mean size of CFE starter farms is 90acres or 37ha, while the mean size of CFE progression farms is 168acres or 68ha. As noted in Section 2, some tenants hold more than one CFE land holding. Some tenants also rented other land in addition to their main, residential CFE holding. Five (of 17) farming businesses interviewed held more than one land parcel with the CFE. 12 (of 17) farming businesses rented or owned land outside the CFE which they farmed alongside their CFE holding. These additional parcels ranged from 8ha to 75ha.

As indicated in Figure 5.1, the types of CFE farm business taking part in the research tended to be lowland livestock farms, dairy farms and mixed farms. However, within these farm types, tenants were pursuing very different business models to ensure farm business resilience. Five (of 17) farm businesses had diversification enterprises on farm, six (of 17) farm businesses were highly specialised and two (of 17) farm businesses were adding value to their products by processing or supplying a niche market.

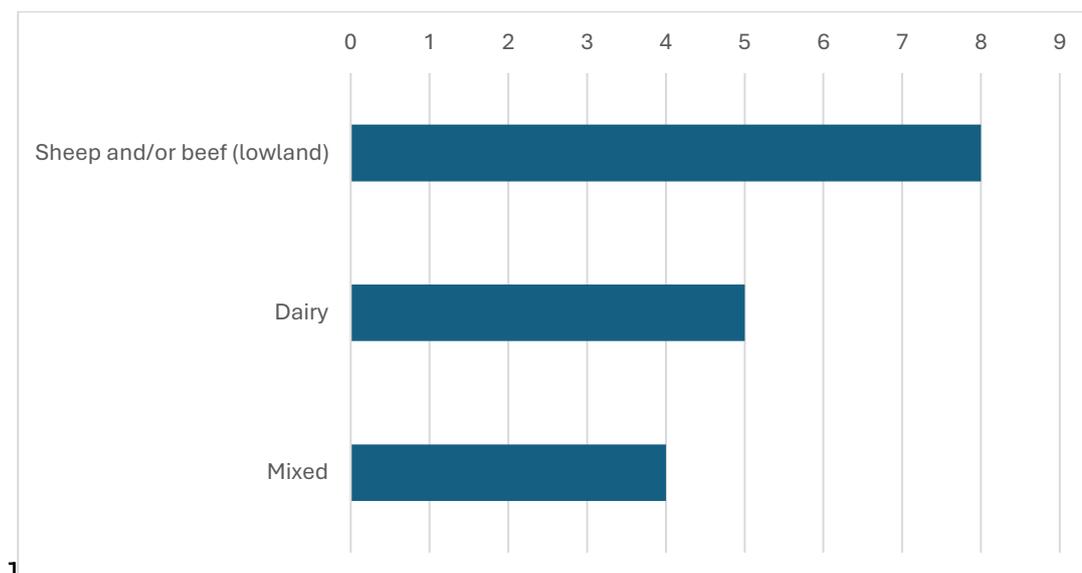


Figure 5. 2 Types of farm business on the estate¹

Those interviewed were asked roughly how their household income was split between farming income and non-farming income (see Figure 5.2). This non-farm income was derived predominantly from either on-farm diversification projects or off-farm work, which tended to be within agriculture-adjacent industries (veterinary practice, farm advice) or agricultural consultancy, for example. Three (of 17) farms were only drawing on non-farm income; these were new entrants on starter farms who were reinvesting the profits from their farm back into the business. For seven (of 17) non-farm income formed the greater proportion of their household income, these tending to be either highly diversified businesses and/or businesses where one family member worked on the farm and the other worked off-farm.

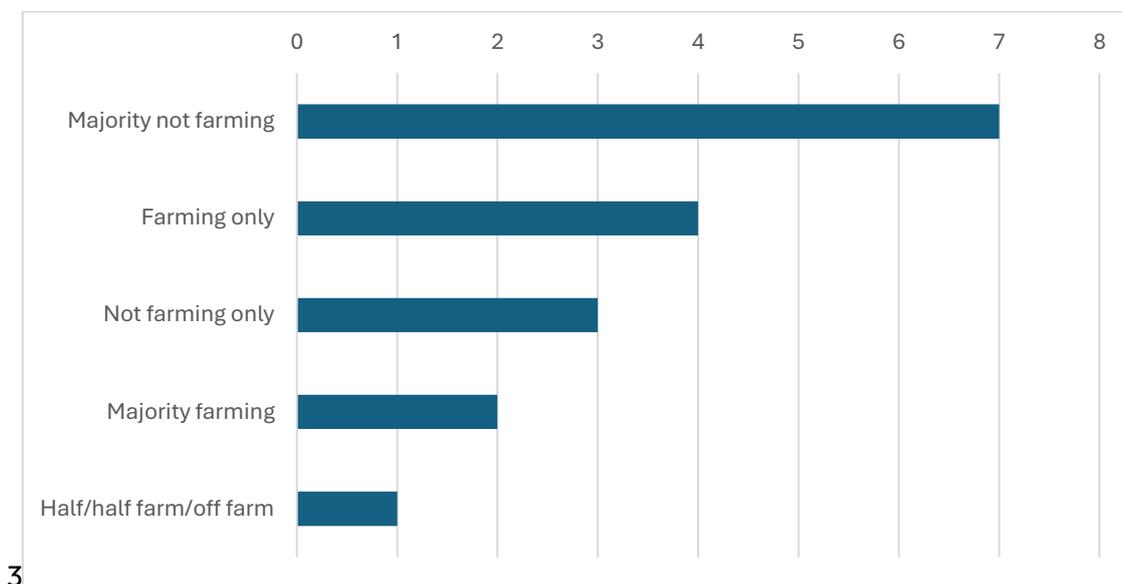
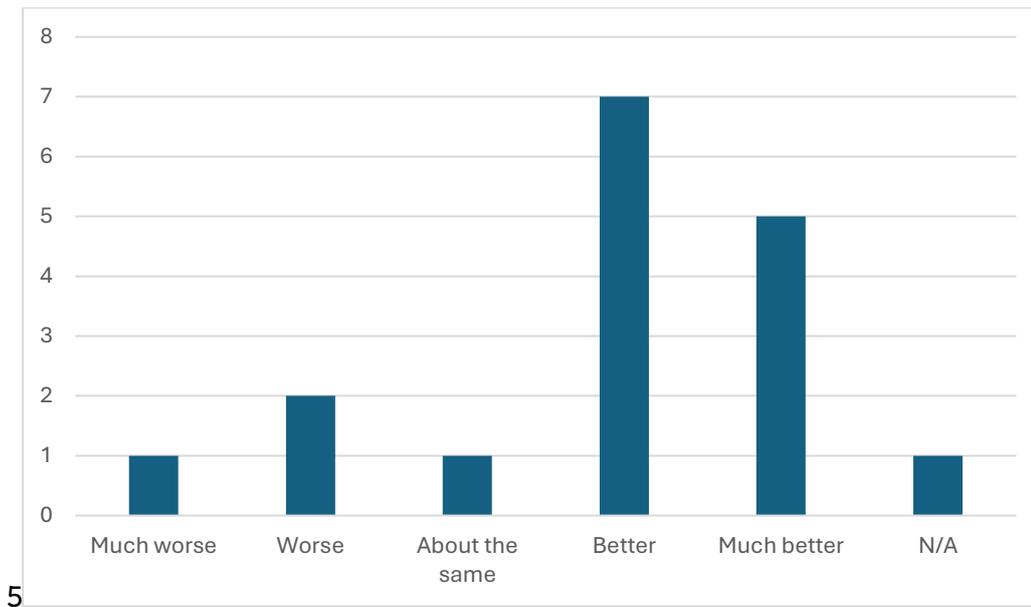


Figure 5. 4 Source of household income CFE tenants

¹ Please note: one farm type was changed to preserve farm business anonymity



5 *Figure 5. 6 How would you describe the economic performance of your farm business compared to five years ago?*

The majority of tenants (see Figure 5.3) thought that the current economic performance of their business was better or much better than five years ago. A similar proportion of tenants interviewed were positive about the prospects for their farm business over the next five years with 11 (of 17) broadly optimistic. Tenants tended to be more optimistic about the prospects for their own business compared to the wider farming industry; only seven (of 17) tenants were optimistic about the future for farming in the South West.

“There’s a massive change in farming history, biggest since the Second World War... I think with that is that brings opportunities, I think for the first time as well, being a new entrant not from a farming background at all I think actually is probably a massive benefit at this moment because you’ve not got blinkers on, you’ve not got family pressures, you can really just farm in a certain way. You can just take it at face value and work out the best way.”
IN90a

“We didn’t need the BPS to survive and obviously surviving and thriving are two different things, but we’ve have found during our first sort of template of the SFI scheme that we should be able to replace the BPS effectively.” BX64

However, other tenants indicated that BPS payments might have been used in the past to re-invest in infrastructure, highlighting some of the impending challenges for the CFE and its farmers, despite their optimism.



6.0 Challenges and opportunities for the CFE and its tenants

6.1 Tenant landlord relationship

Tenants emphasised that they appreciated the opportunity to get into farming provided by the CFE. Many commented that they would not have been able to farm in their own right had it not been for the opportunity provided by the CFE. Some commented that they were well placed to apply for other farming opportunities having gone through the rigorous process of developing a business and financial plan to apply for a CFE farm. Tenants felt that being on the CFE provided them with a ‘farming CV’ which stood them in good stead to access other opportunities following their time on the estate.

“I always thank Devon County Council for the opportunity to get on to the ladder in the first place. You know, they took a risk. I was just a single chap by myself, to be honest... They started me on the farming ladder. And, you know, 20 years later, we're still a tenant on the estate. So I have a lot to thank Devon County Council for from that point of view.” AZ27

Tenant workshop reflection: Workshop attendees reflected on all that the CFE has to offer tenants. They noted that rents do tend to be reasonable. The CFE does still provide important entry point to farming. Securing a county farm tenancy still has cache and can strengthen farmers’ case when needed to move on to next farm. Tenants valued the rigour of DCC application process, which meant CFE tenants are on top of their business plans and forecasting. Workshop attendees felt CFE tenants have a better handle on their business’s performance such as costs, income and return on investment.

As indicated in Figure 6.1, 15 (of 17) farm businesses pointed to their relationship with CFE management as an independent one where tenants were enabled to get on with farming without interference. This was highly valued by tenants. However, as noted in the Rock Review (2022) emerging policy challenges for tenant farmers necessitate the building of collaborative relationships between tenants and landlords. Six (of 17) farm businesses described their relationship with CFE management team as collaborative. Tenants pointed to a need for more collaborative working relationships to tackle issues such as funding infrastructure improvements on the estate, for example. Section 6.2 gives an indication ways in which tenants felt the relationship between tenant and landlord could be strengthened for the benefit of the CFE.



Figure 6. 2 Tenant perspectives on the tenant landlord relationship²

6.2 Building collaborative relationships on the estate

Four key elements of collaborative working between landlord and tenants emerged from interviews with tenants:

- **Flexibility towards problem solving**

Tenants were cognisant of the challenges facing SWN and DCC budgets and the limitations this placed on infrastructure improvement projects on farm.

“[I think SWN are] in an impossible position where [they] can't possibly get enough money to do a good job.” FS96

However, tenants remained frustrated that potential collaborative projects were generally rejected by CFE management due to resource constraints. Tenants (AB44, IN90a, IN90b, CC03, FS96, TY28 for example) used similar wording to suggest that “the answer is always no,” when they seek to collaborate. Tenants identified a more flexible approach to problem solving as a way to build greater resilience amongst farm businesses on the estate.

- **Holistic perspective towards projects and repairs**

Tenants understood that DCC needed to follow due process and be able to demonstrate value for money when contracting firms to carry out repairs on CFE properties. However, tenants pointed out that a more holistic approach towards repair projects might enable better value for money over time. Tenants (AB44, DY75a, DY75b, CC03, for example) pointed to situations where the cheapest quote for a repair was accepted, but poor workmanship caused additional problems which then needed to be fixed, costing the CFE more overall. Tenants suggested a more collaborative relationship between landlord and tenant could facilitate a more timely, cost-efficient approach to repairs to the benefit of both tenant and landlord.

² Note tenants could choose more than one option for this question.



Tenant workshop reflection: Workshop attendees felt the CFE often lacked an ‘on the ground’ understanding of the current status of the farm, particularly in relation to farm infrastructure. It was felt that tenants would welcome a regular in-person ‘walk around’ of the farm written up and shared between tenant and estate to aid closer understanding and more timely and better decision-making regards repairs. The group also suggested a more collaborative partnership approach might facilitate more trustful and pragmatic ways of working, such as allowing tenants to undertake some work where appropriate.

- **Perception of fairness**

Some tenants pointed to examples of decision making on the CFE where they were unsure of the criteria on which decisions about awarding tenancies, penalising dilapidations, or supporting infrastructure projects were being made. Regenerative or diversified farms were unsure how their business plans on the CFE were evaluated against more conventional farming businesses when tendering for an opportunity, for example. Some tenants worried about being too vociferous about issues of fairness on the estate.

“You know, we then thought if we pushed too hard [about] the problem, and then they’ll look less favourably on us. So it’s one of those things.” BX64

Some tenants interviewed had taken on tenancies on farms on which their parents had previously held AHA tenancies. Other tenants on FBT tenancies had children who wished to take on the tenancy of the farm but understood that this was no longer Council policy. Again, grey areas like this contributed to a perception of unfairness amongst some tenants on the estate.

Tenant workshop reflection: Tenants attending the workshop were unclear about the DCC’s strategic objectives for the CFE. There was an awareness of DCC objectives for net zero, but less understanding of the detail of how DCC translated that into its strategy and day-to-day management of CFE via SWN.

- **Improving councillor experiences of the CFE**

Tenants pointed out that councillors on the CFE management committee generally had little opportunity to engage with the farms on the CFE. Some tenants suggested that councillor farm visits might help councillors on the estate to understand some of the ongoing challenges that tenant farmers face and learn about tenant engagement with SFI actions on farm.

Tenant workshop reflection: While DCC/SWN approach to leave tenants to it was generally welcomed, tenants also welcome regular in-person ‘walk around’ of farm written up and shared between tenant and estate to aid closer understanding, collaboration and ‘no surprises’ during outgoing process.

Recommendation 1: DCC to develop a new future orientated strategy for the CFE, in conjunction with stakeholders. This should include clear expectations about supporting different farming types on the CFE, to guide decision making about opportunities, infrastructure projects and dilapidations.

Recommendation 2: SWN/CFE committee councillors to undertake regular ‘walk around’ farm visits, alongside DCC officers, to build better understanding of: farming actions taken over the FBT;

projects and repairs needed or planned; councillor knowledge of farming within a changing policy landscape.

6.3 Advice and support

Tenants were asked about current and emerging issues that were likely to impact on their farm business, now and over the next five years. Figure 6.2 indicates the issues most identified as ‘very likely’, ‘likely’ or already impacting on the farm business. The issues identified as most pertinent by the majority of farmers included agricultural payment schemes, nutrient management, water quality and disease management. However, farmers also noted that adverse weather and climate change was likely to impact on their farm business in the near future with fewer tenants able to confidently say they were already dealing with this issue.

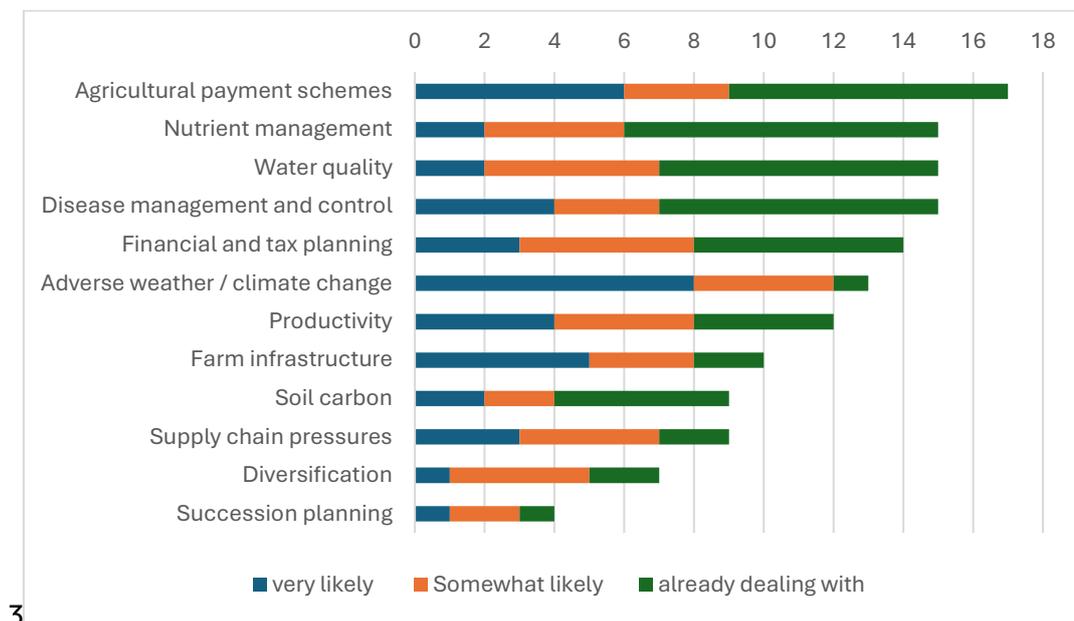


Figure 6. 4 CFE tenants’ assessment of farming issues likely to impact their business now, and in the next five years

Tenants were asked how useful a selection of typical types of advice and support might be for building resilience to these issues within their farm business. As indicated in Figure 6.3, tenancy negotiation and business planning were identified as the most useful types of advice and support for those interviewed. However, some tenants noted that some types of advice and support were more relevant at different stages of their farming career.

“That’s really helpful when you were like, well, maybe earlier because I think. Some of these things, yeah, are very much more helpful when you’re starting out or yeah, at certain points in your career.” AZ27

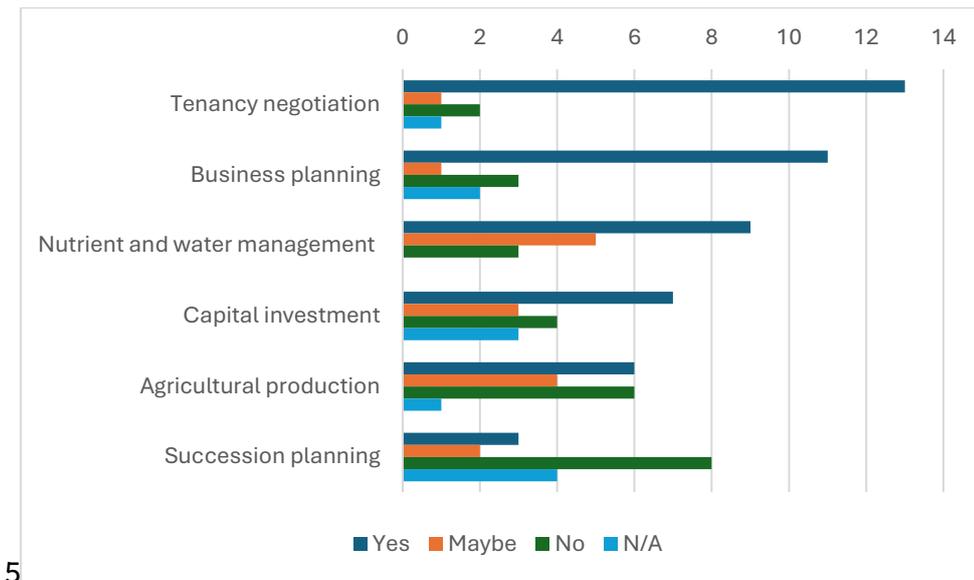


Figure 6. 6 CFE tenants' assessment of the usefulness of selected advice and support for their farm business

Tenants were asked how easy they found it to access these types of advice and support when they needed it. Generally, tenants responded that they were happy to seek professional paid-for advice when necessary. Four (of 20) tenants interviewed also worked professionally as agricultural advisors and were understandably confident in their ability to enhance their knowledge when required. Tenants with very diversified businesses or niche routes to market pointed out that their advice and support needs were very bespoke so preferred to seek very specific advice on certain issues rather than engage with general farming advice provision. New entrants or those approaching the end of their time on the CFE, were more likely to point to specific advice and support needs. Tenants generally understood that it was not DCC's role to provide advice, but as indicated in Section 6.2, tenants pointed to ways that DCC and SWN could facilitate greater information sharing and peer networks on the estate.⁷



Figure 6. 8 CFE tenants' assessment of the availability of selected advice and support



6.4 Support and advice needs identified by tenants

A range of support and advice needs were identified by tenants:

- **More support and advice for new entrants joining the estate.**

Support and advice for new entrants was the most identified support need within the sample. This was most commonly identified by tenants who had recently taken on starter farms, but it was also suggested by more established tenants reflecting on their memories of joining the CFE. It was suggested that this support might include a welcome pack for new starters with emergency contacts, a 'things to think about' list and more information about tenancy obligations written in plain English. Other suggestions included introducing new tenants to more established tenants via peer networking events.

- **Peer networks on the estate.**

Many tenants interviewed pointed to the absence of networks on the estate which could serve to foster connections between CFE farm tenants. Some more established tenants noted that while this had been attempted in the past, attendance had generally been poor. Newer entrants to the estate were enthusiastic about re-energising peer networks suggesting that this might include farm visits or events with guest speakers showcasing best practice. Some tenants suggested this could be self-organised amongst tenants, others pointed to the role of the CFE management team to facilitate. Some pointed to the Duchy of Cornwall's model of supporting tenant networks as an example of best practice. CC03 described a past model of events run on the estate which had incorporated networking and business advice, reflecting that:

"They did a week, it was like an academy, they called it, but basically they got speakers in every evening for the panel. And they got business advisors ... environmental, all sorts of different things. And I have to say, I really, really value that. That really, really was a real positive thing."
CC03

Tenant workshop reflections: Tenants noted that having opportunities to learn from each other, visit farms, support each other, pass on knowledge would be a big benefit. Having something like the 'Seeing is Believing' tenant communication and networking programme the Duchy of Cornwall operates, could help tenants help themselves.

- **Cooperation between tenants on the estate**

Tenants suggested that there may be opportunities to foster better cooperation between tenants on the estate, for example selling products or farm byproducts or exchanging services. Some suggested there may be opportunities to collaborate on business ideas and contribute to a larger scale project that spanned across farm businesses.

- **Dissemination of information: grants, opportunities**

Tenants suggested that the CFE newsletter, circulated by SWN, could be used to disseminate funding opportunities to tenants. DY75a, DY75b pointed to situations where they had paid for external advice, but advisors had failed to make connections between their diversification projects and grants on offer. They suggested that SWN with their knowledge of the farm businesses on the estate were in a good position to signpost specific tenants to relevant opportunities.



“And it's great to have these new people with new ideas, but there's so much power that, like [DY75a] said, that that the land agent could just offer that information towards them at the correct time for these new entrants to get a little bit extra. Potentially little workshops or anything might be useful.” DY75b

- **Mental health support for tenants**

Some tenants pointed to the loneliness and isolation of farming life and their wish for better mental health support for farmers. Some pointed out that tenant mental health could be supported by fostering stronger peer networks on the estate.

“It is a lonely old job. It's the old self well-being side of things ... You can't say, it's the county council's responsibility to check on people's welfare because that's just ridiculous, but y'know to have someone think, I haven't heard from them in 9 months. I'll give em a message.” AW13

- **Support for tenants reaching the end of their 25-year term on the estate**

Tenants nearing the end of their 25-year term on the estate indicated a need for more support transitioning off the estate. Often tenants nearing the end of their 25-year term were not ready for retirement but were finding it difficult to identify viable next steps for their farming businesses at the end of the 25-year term.

Additional tenant workshop reflections:

- **Partnership working**

Workshop attendees observed that there are so many people knocking on farmers' doors as expert consultants and advisors, yet the quality of such advice is not clear and not many really are impartial (they are also selling a product or service for example). Tenants suggested there is perhaps a role for DCC to initiate partnerships and act as conduit and provide funding, as per Duchy of Cornwall.

Recommendation 3: SWN to revise welcome pack for new starters to the estate with key information, key contacts, a 'things to think about list' and more information about tenancy obligations in plain English.

Recommendation 4: DCC, SWN to support the establishment of tenant peer networks on the estate. These would include farm visits and talks from relevant speakers for example. These would have multiple benefits including: peer support, exchange of knowledge and an opportunity to foster cross-farm business collaboration.

Recommendation 5: Links to be strengthened between Trading Standards Team, DCC and CFE to ensure CFE tenants have access to farmer mental health support on offer from that team and that SWN colleagues have access to training on mental health issues in farming.

6.5 Tenancy transitions

- **Ingoings/outgoings fees**

The CFE operates a system of compensation for agreed infrastructure improvements made by tenants on the estate, whereby incoming tenants reimburse outgoing tenants for improvements made, minus depreciation. While well-intentioned, many tenants expressed concerns about the



system. Tenants shared stories of ingoings/outgoings fees taking up to three years to be negotiated and resolved. For some tenants this involved significant amounts of money; numbers quoted during interviews ranged from £15k - £75k. For outgoing tenants, this capital might be needed for their post-CFE business, causing hardship if this money is held up over a significant period. Some tenants expressed a reluctance to invest heavily in their farms, particularly in the later years of their tenancy, as they had little confidence they could recoup these depreciated costs in a timely fashion.

“This system is breaking down on the estate. And it's getting and it's getting a lot of tenants in a lot of financial problems because these fixtures and fittings and dilapidations aren't being sorted out quick enough.” AZ27

“We put up a shed and that is depreciated over 25 years. But I guess when it comes to all the concrete and the fixtures in the shed, I expect we'll have an argument... it took three years from my last farm to get paid out. Well, that's not good enough. And you know if I move from this farm and I need my money to buy a house or whatever, and it's going to be 3 years before the Council, you know, before the issue is resolved well. You know that needs to be all that nonsense needs to be streamlined, really.” SV31

Some tenants also pointed out that ingoing fees were not even estimated at the time at which they took on the tenancy. This meant they had significant ongoing uncertainty about the level of ingoing fees that they might be expected to pay.

“Yeah. And you know, we're 12 months in and we still don't know what our ingoing costs are, what the previous tenant is going to be wanting us to pay, to come into the farm and for any improvements that they did... So they ask you to put a business plan. So you put your business plan together, but actually you're actually working off of nothing at all, because actually you, you know, you could have £70,000 worth of ingoings.” TB40

Tenant workshop reflection: County farm tenancy ingoing/outgoing process was considered by attendees to be a significant barrier to investing. A more transparent, fair and timely approach was needed to enable tenants to build more resilient farm businesses.

- **Size of CFE farms**

Section 5 indicates the average size of starter and progression farms on the CFE. Some tenants rented other land in addition to their main, residential CFE holding. Five (of 17) farming businesses interviewed held more than one land parcel with the CFE. 12 (of 17) farming businesses rented or owned land outside the CFE which they farmed alongside their CFE holding. These additional parcels ranged from 20 - 150 acres.

Some tenants pointed out that historically the CFE had comprised many smaller farms and these had gradually been amalgamated over time. Some also questioned the viability of some of the small starter farms on the CFE and questioned whether the estate was due for another structural review.

“They [should combine] the two Council [land parcels] together, actually, and they made one slightly bigger ... And I think sort of amalgamating them, especially when you got one next to the other, they would sort of future proof for you, but it would make it more viable, that's for sure.” BX64



Some tenants pointed to industry-specific challenges on small starter farms on the estate. TY28 wondered specifically if small dairy starter farms were still an appropriate starting point for new entrant dairy farmers.

“The potential on these farms is pretty small. And I sometimes wonder whether some of the small farms on this estate are doing young people a disservice in that their enthusiasm to give farming a go is so great that actually they lose sight of the bigger picture. There's a lot of young men out there that are milking 40 or 50 cows that will be quite capable to get a [herd manager] job and earn £50/60k a year ... And I wonder whether actually the whole principle of the estate has changed. The estate still runs with the same goals and the same aspirations as it as it was set up to do in 1918, when the Great War ended. Farming's actually moved quite a long way since then.” TY28

- **Length/type of tenancy**

Typically tenants enter the CFE on a smaller starter farm, with a seven year FBT. Starter farm tenants then have the option to secure another seven-year tenancy on the same farm but should then leave the estate after this 14-year period. The other option is for tenants to move to a larger progression farm, with a longer FBT tenancy term (typically 15 years) which can be extended so tenants spend a maximum of 25 years on the estate. Many pointed to the short tenancy terms disincentivising investment being made on the estate.

“Maybe the County Council should be looking to restructure their tenancy. They don't actually allow longer term tenancies. Again, to give people a bit more confidence in investing and you know the tenant is then more likely to improve the infrastructure on farm knowing that they have a longer timescale to pay that off... But I'm going to balance that by the fact that if you've got lots of people stuck in farms, you're not then providing that nice new entrant opportunity that Devon County Council wants to do. So that's a bit of a balance.” BR57

Tenants understood that progression farms tended to be dairy farms with fewer opportunities available for other types of farm business. GT11 had made significant investment in their starter farm but understood that moving to a progression farm would be ‘sticky’ with few suitable opportunities. Instead, they were planning for two consecutive seven-year terms on the estate but noted that for the second term they would be less engaged with the farm as they sought their next opportunity.

“So we're banking on that we're going to get the next seven years. And then that will give us the chance to go into the next seven years and then? You know when we're halfway through that, that's when we'll be looking to move.” GT11

Some tenants have had approval to stay on a starter farm, but with a progression FBT enabling them to continue to build their business and invest in the same farm. However, not all tenants were aware that this was potentially an option. As AW13 pointed out, this uncertainty contributed to the dilapidation on starter farms as ‘little jobs’ on farm become increasingly deprioritised as tenancies progressed.

“I don't know what will happen. Or where we will go. Or are they going to kick us out at the end of seven years? Do they give us an extension? Are we going to stay here for any longer



term than that? ... You think actually, I'm doing quite alright here. I'm quite happy. Then shouldn't you be thinking, I need to leave here ... When you get the 'I need to leave here' approach, you don't seem to do all the little jobs that need doing." AW13

For those tenants pursuing diversified farm businesses investments tended to be particularly tied to the farm and not easy to move from a starter farm to a progression farm. Often these businesses might be adding social value across priority areas for DCC (social care, education, public health) but again these tenants understood their time on the CFE to be limited to two consecutive seven-year tenancies.

"I think we'd struggle to move to a bigger farm within the estate... Some of what we've got, you can't move very easily as well, especially the diversification that's heavily based and the success of it is heavily based on the location... we would very much like to be here for the whole 14 years and then ... we're always looking for opportunities that might come up. But we would certainly like to be here as long as we can because we've already put a lot of sort of time and effort into the place." BX64

Devon CFE operates a policy that the maximum term tenants can spend on the estate is 25 years. For some tenants, this meant that they were approaching the end of their time on the estate but were not ready for retirement. Often these tenants were struggling to identify suitable opportunities to maintain their farm business after their time on the CFE had finished.

Recommendation 6: DCC/SWN to undertake review of ingoings/outgoings process in consultation with CFE tenants, alongside the legal process.

Recommendation 7: Within the scope of **Recommendation 1: strategy development**, DCC to consider a structural review of CFE estate holdings including amalgamation, reinvestment of capital into infrastructure and change of farming use where appropriate.

Recommendation 8: Within the scope of **Recommendation 1: strategy development**, DCC/SWN to undertake a review of typical FBT length with view to consider flexibility of existing tenure arrangements in order to meet DCC strategic priorities for the CFE. Examples of greater flexibility might include: lengthening starter FBT to 10 years (with five-year break clause), longer FBTs for farm businesses supporting delivery of DCC strategic priorities or lengthening maximum tenure on the CFE in line with retirement of the principal tenancy holder.

6.6 Investing in on-farm infrastructure

- **Starter farms and investment**

Many tenants particularly emphasised the dilapidated state of starter farm infrastructure. Some tenants pointed to dairy starter farms in particular no longer being able to secure contracts from big milk buyers due to their size, location and infrastructure. As noted in section 6.5, new entrants on starter farms tended to be working hard to establish and grow their farm businesses over their seven years on the CFE starter farm. Many did not draw on farm income, instead re-investing profits back in their farm business in order that they can demonstrate capacity to take on a progression farm or other opportunity. At the same time, new entrants tended to join the CFE with young families, which also put a strain on family earning capacity. These factors contributed to a lack of capacity amongst starter farm tenants to invest in on-farm infrastructure.



“I don't think we'll have put an awful lot of capital into the farm... In terms of payback period, you won't pay stuff back. [The only realistic] capital investments would be to try to return it within that time frame. It's not a long-term thing. So in terms of if you're going to reseed something, you're going to have it back within the following year, aren't you? ... Major capital investment, I suppose in sheds I'd have to be working in conjunction with the Council to come up with some sort of a structured deal.” EZ89

As FS96 pointed out, at this point in the farm business lifecycle, extra support would be needed in order to pursue an infrastructure project.

“We could have come up with something if they'd had money [to] put into it and I couldn't afford to just do it [on my own]... The trouble is, is since the farm has actually been making money, I've had other places to spend it that will better benefit my family's future. So now that I can afford to invest in the farm [I won't]. This is this is what the Council don't get.” FS96

- **Rights and responsibilities investment on farm**

Tenants pointed to priority infrastructure needs linked to existing or emerging legislation. Some dairy farmers pointed out that CFE had invested in new slurry storage for example on their farms to ensure compliance, of which they were appreciative. However, discussions about nutrient management and water quality revealed that many farm businesses (both dairy and non-dairy alike) have concerns about dirty water management, covering yards or slurry storage infrastructure for example. Tenants pointed to infrastructure needs that are the CFE's liability, rather than the tenant's liability, however there is little resource available to pursue these projects. Tenants were generally understanding of the complex barriers preventing DCC from investing in the CFE, however they pointed to the urgent need for a more sustainable solution.

“Problem is... they don't have a lot of money available to invest in the farms... So our farm in particular for it needs a lot of investment in facilities. But unfortunately, the Council don't have the funds to do that. Which is not their fault. It does feel a bit unfair that when they - when they restructure a farm and sell a bit of the land off or sell the farmyard off. They don't have the money turned back into the estate. It goes in the central pot then they have to tender for it.” CU42a

Other tenants pointed to infrastructure needs which may have been a tenant liability to repair, however ongoing neglect had resulted in the need for significant works or replacement. There was significant uncertainty amongst tenants about reasonable division of liability for infrastructure upkeep and replacement between tenant and landlord. Tenants pointed out that they are liable for roofs as an example of an unreasonable liability.

“It's kind of like you ... say the shed isn't fit for purpose, like, it's not even insurable. And [they are] just like, “oh, that's a tenant problem,” and it's like, well, I'm paying a lot of rent a year... you've got to give something back. I know they've got to get a return on the land that they own. But I think there has to be a level of investment in the infrastructure of the farm.” AB44

- **The right infrastructure for the right farm**

Four livestock farms pointed to the infrastructure on their farm as ex-dairy infrastructure. As the infrastructure was no longer sufficient to maintain a viable dairy business, these farms were let as



livestock farms. For the tenants on these farms, there was frustration that this dilapidated dairy infrastructure was also not suitable for livestock farming.

“See, it was an ex-dairy farm many years ago, and all of the drains and gutters are long choked and blocked and not fit for modern farming really. It needs to be completely redirected, new drains new, you know new soakaways and unless that we do that ourselves with our own money now you know that that that will not be done by the Council. They are fully aware that this is an issue.” CC03

“The buildings aren't suitable for the purpose that they're there for, so we've got to do a huge amount of work to get the buildings because it's an old dairy farm that they no longer want to put dairy into. So they've just gone: “Oh, well, you can use it as a mixed farm.” Well, that's OK. But sheep don't stay in with a single strand of barbed wire.” TB40

Tenant workshop reflection: Workshop attendees pointed to a perception of the CFE as structured predominantly for dairy farms, with infrastructure geared towards dairy farming and dairy holdings ring-fenced to dairy businesses. Tenants questioned whether the estate could be reimagined to support a broader range of farm businesses. Perhaps ex-dairy farms no longer viable for dairy farming could be remodelled to better support other farming types.

Highly diversified businesses pointed to priority investments on farm for their farm business potentially being different to those prioritised by more specialised farm businesses. Highly diversified businesses might prioritise restoring an old cobb barn, or a drystone wall for example.

“I think it should be their role to improve fixtures and fittings beyond what they have, we've got lots of lovely old buildings that we could utilise and they're not being fixed up. It's a difficult one, because I can see... for modern farming some of these old buildings probably are no use, however for us what we do and how farming is going and the diversifications, I think they could do more with the repair and maintenance of the sheds and the buildings... We've got a couple where roofs are just not being maintained and it's too much for us to look after because it's too expensive and ... the land agent doesn't have the funding to do [it]... But ... If you look into the future... these buildings need to be preserved because they are a long-term asset.” DY75b

- **Capital grant schemes**

Most tenants interviewed pointed to the difficulties in accessing Government capital grants as CFE tenants. At the time of interviews, the Government had suddenly paused capital grant funding applications. Many tenants had pending applications or had planned to put in applications for this scheme but were left uncertain about their options going forward.

“And then they just shut all the grant funding windows because nobody really knows what's going on there. ... And then you know, where does that leave you? You being a tenant farmer. Are you expected to foot the bill for it all? If there's no grant funding?” AW13

Many tenants who had been able to access the grant scheme while it had been running pointed to the challenges of engaging with this opportunity as tenant farmers. Two farm businesses had engaged with the scheme in 2022 and price rises following the war in Ukraine meant that there was a significant shortfall between the grant they had been awarded for works and the costs of materials. These businesses subsequently struggled as there was no flexibility within CFE budgets to



support them with this shortfall. Outside of these specific circumstances, tenants pointed to the challenges of engaging with Government schemes where tenants were expected to be able to finance the costs of infrastructure improvements themselves and then claim back costs once works were completed. These prescriptions limited tenant capacity to make best use of Government grant schemes.

“And then we worked out after we applied for all of it, we couldn't do it again, obviously, but we had to do it within two years. But it was like £140k, if it would have cost over £140k to do it all. You know, it's all the fencing, which admittedly the fencing, you could do a bit and then claim, do a bit, then claim. But we didn't have the time to do bits, then claim, do bits, then claim.” DY75a

Tenants also pointed out that institutional landlords such as the CFE are unable to apply for Government grants, inhibiting more collaborative solutions to engaging with schemes on tenants' behalf.

Tenant workshop reflection: Uncertainty about the future, particularly in regard to the Government's commitment to current agri-environment schemes and (the then) pause on capital grant funding was seen by tenants as making decisions to invest to improve their resilience as more difficult and risky. This was also noted by workshop speaker, Marianne McHugh of Business Information Point, who found a lack of appetite for capital intensive diversification projects among many of the 60 SW farmers they worked with on innovation pathways:

The general uncertainty and risk is driving farmers to focus on really specific changes to improve performance of their farm business rather than undertake 'something completely different' type of diversification. They do exist but are in the minority.

- **Financing on farm investment**

Many tenants pointed to the difficulty of securing business loans for making on-farm investments. Few had significant assets which they could use to secure loans. Tenants also had to balance their borrowing decisions between their moveable farm business assets (e.g. farming equipment, livestock), building personal assets outside the CFE and investing in CFE infrastructure.

“Because we're all new farmers, new farms. Often we don't have a great deal in the way of assets, so if you go to a bank and you ask them to lend you lots of money, they were generally a higher seen as a higher risk and therefore pay a higher interest rate. So for us to improve a farm that we're on actually costs us a lot more, due to the interest.” BR57

Tenants pointed to examples of best practice they had heard of from other County Farm estates or private estates to finance on farm investment. AB44, IN90b pointed to examples where councils helped tenants to finance the cost of infrastructure investments on farm and tenants paid back this sum via increased rent payments. Others (BR57, IN90a, IN90b for example) pointed to the Duchy of Cornwall model of providing support for tenants to buy second-hand equipment, which is typically not eligible within Government grant schemes.

“The Duchy were doing their own kind of self grant schemes for farms whereby they were allowing farms to use the grant to purchase second hand kit rather than new kit. I mean whether the county farms could look at some form of I don't think machinery ring or



something where you can share equipment but that's quite difficult because we're dotted all over Devon.” BR57

Recommendation 9: Within the scope of **Recommendation 1: strategy development**, DCC/SWN to undertake a CFE-wide infrastructure review, determine priority improvements and explore innovative funding mechanisms in order to share the investment liability more equitably between tenant and CFE.

Recommendation 10: Centre for Rural Policy Research (CRPR), University of Exeter to report structural barriers to tenant engagement with capital grant schemes, and engagement with new policy environment more broadly to DEFRA/ Tenant farming commissioner.

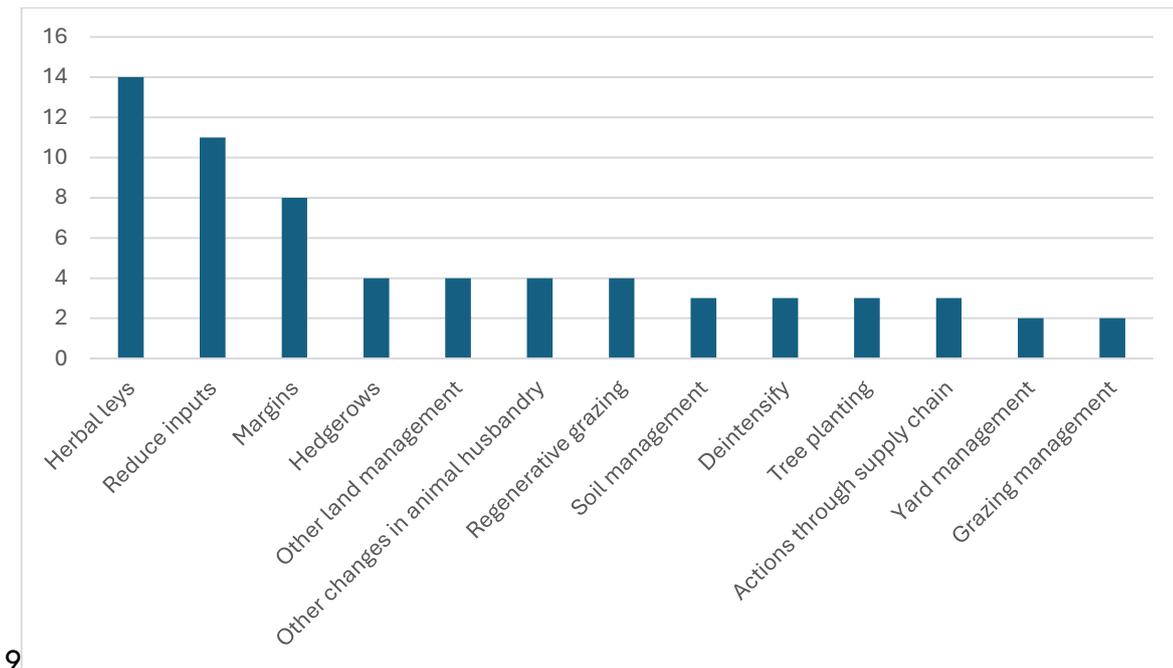
Recommendation 11: DCC/SWN to undertake or commission a benchmarking review of estate management practices deployed across other farmed estates in both public and private sector in England. This recommendation arises from our own reflections on data gathered during the course of this study indicating new and emerging thinking around landlord-tenant models that is being developed/deployed in response to the new agricultural policy environment, and which may help to inform DCC/SWN decisions about next steps in enabling a more resilient CFE.

6.7 Environmental actions and environmental payment schemes

- **Sustainable Farming Incentive (SFI) and Countryside Stewardship scheme**

All but one of the CFE tenants interviewed already held or were in the process of agreeing SFI and/or Countryside Stewardship schemes. The one tenant who was not engaging with either scheme was approaching retirement. Six (of 17) farm businesses were looking to increase their involvement with SFI schemes in future as delinked payments continued to reduce. Four (of 17) farm businesses might investigate more SFI actions in future, depending on how the scheme develops over time. Seven (of 17) farm businesses said they would not increase involvement with SFI in future. These latter businesses typically explained that they felt they had maximised the application of the scheme to their farm at this time and/or could not enter more land into an SFI scheme without compromising production.

Figure 6.5 gives an indication of the type of actions tenants were undertaking or planning to undertake in response to climate, biodiversity and carbon emissions management needs. Incorporating herbal leys and reducing inputs were the most common actions across farm types.

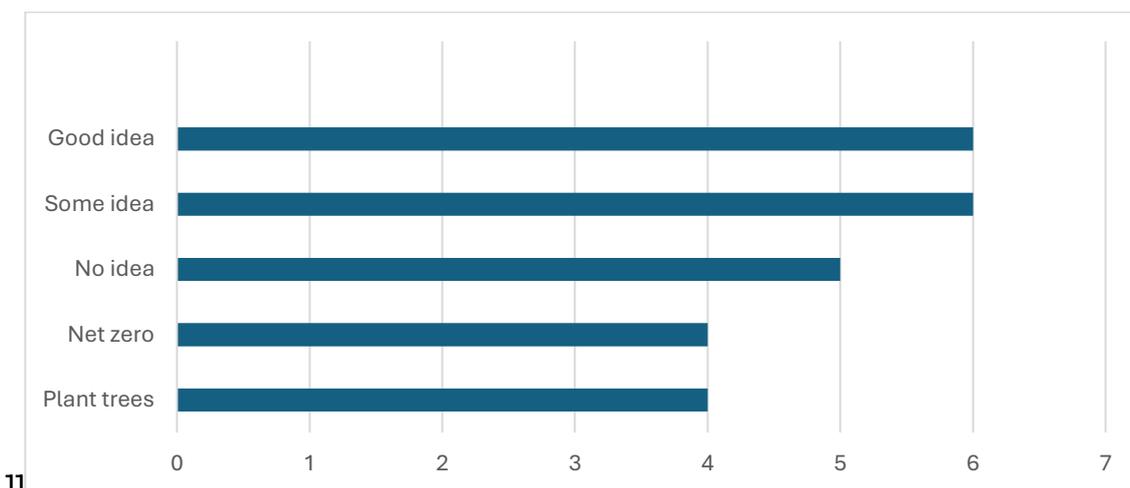


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Figure 6. 10 Thematic analysis of tenant identified actions to manage the impacts of changing weather patterns/ climate change/ biodiversity or carbon emissions on farm

- **CFE tenant alignment with DCC strategic nature, climate and farming goals**

Tenants were asked how well they understood and aligned with DCC’s nature, climate and farming goals. Although tenants first reaction was to suggest that they had ‘no idea’ on reflection many were able to hazard a guess at DCC’s strategic goals in this area, for example pointing to DCC’s net-zero ambitions (see Figure 6.6).



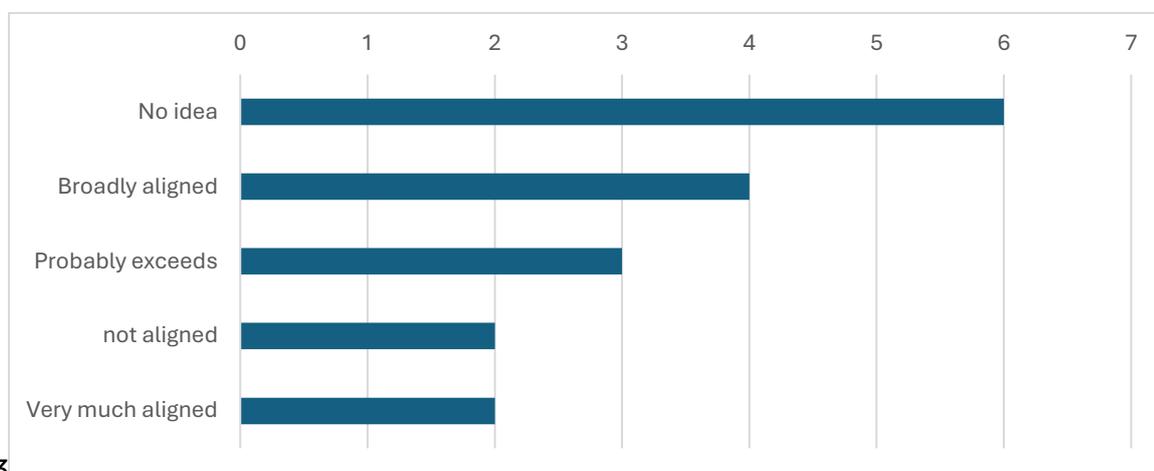
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Figure 6. 12 How clear are you on Devon County Council's strategic nature/climate/farming goals?

Many tenants were hesitant to align their farming practice to DCC strategic ambitions (see Figure 6.7). For some this reflected their lack of understanding of DCC’s goals. For others there was a nervousness that DCC net-zero or environment ambitions might, in time, impact on their autonomy to make decisions on farm. Some tenants referenced other pro-environment landowners who were

taking a directive approach to encouraging environmental actions amongst their farm tenants, describing these tenants as ‘glorified farm managers,’ (IN90a). For others, there was a recognition that pro-environmental action might be necessary on the estate, but it would need to be accompanied by changes in expectations about rent, or legal safeguards for tenants.

“... they're trying to charge us market rental prices and not actually providing infrastructure that an open market rent you'd expect to get. But in addition, if they're looking to work with us on nature recovery strategies or you know different [ways] of trying to encourage us down say a regen route because that's the route they want to go. But they can't have it both ways, so if they want to do that, they need to look at rental values because obviously that's putting a bit of a management prescription on your business, so yeah, that's a tricky one.”
BR57



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Figure 6. 14 How closely do you feel that you personally are aligned with these strategic nature/climate/farming goals, as far as you understand them?

- **Types of environmental farming practice on the CFE**

Notwithstanding the fact the most tenants interviewed were engaged in pro-environment action on farm (Figure 6.5), tenants expressed concerns about more directive approaches to encouraging environmental action on CFE farms. Broadly two types of pro-environment farming best practice could be identified on the estate – carbon conscious and regenerative farming practice. Dairy farms selling into large supply chains were incentivised within their supply chains to make changes in farming practice. These changes tended to be focused on reducing carbon emissions on farm. This can be understood as a more productivist model of environmental farming, for example by maximising production of milk from each animal, in order to reduce carbon emissions per unit.

“You know, we have we supply milk to [supply chain A] and [supply chain A] is very environmentally conscious, so we [do] all the carbon footprinting and all that stuff, we've got to do it all the time... So I guess we're probably ahead of what Council would require, and we're probably ahead of the vast majority of the tenants to be honest, because none of the beef and sheep farmers or very few of them would be carbon footprinting and all this nonsense we have to do. But that's coming from our milk buyer and the supermarkets. It's not coming from the estate.” SV31



While many farm businesses within the sample were adopting some low input or pro-environmental actions on farm as indicated in Figure 6.5, these tenants tended not to identify their farm businesses as regenerative farms.

“I think the way it always got described to me is if you're on that sort of system, you're never gonna go bankrupt, but you're never gonna be a millionaire. You know, you're not getting that same sort of peaks and troughs by being this low input system. So, yeah, I think we're that's the way we are. We're just a low input system. So we should be sort of building carbon anyway... I think I'd like to get to a point where nothing gets brought on farm.” TL17

Four farm businesses explicitly described using regenerative grazing practices to make environmental improvements on farm. An additional two farm businesses described focusing on their grazing management. These broadly regenerative types of farming business were typically diversified or specialist livestock farms and focused on maximising the capacity of the farm to support livestock without the use of bought-in inputs, as far as possible. Some of these farm businesses indicated that they would be willing to implement further regenerative farming practices but were unwilling to do so without a clear steer from CFE that the estate would view such practices as desirable and that they would not be treated as a dilapidation.

“Actually [its] not that we want thanks. I think it's more the fact we've got the confidence, the way the industry is going and it has to go to farm regeneratively and with less inputs and less tidy farming. If I mean our place isn't a dump, but farmers collectively got OCD. Have to have everything sprayed off tidy and that, 1. not only is it bad for the environment, 2. it just doesn't make good business sense. It's just a waste of money. So it'd be nice if the confidence to be able to do that, to run our business that the new, the regenerative way and take advantage of agroforestry and herbal leys without thinking it's going to have a negative impact financially when we leave the estate. Because we would do more here if we have that confidence.” IN90b

Recommendation 12: DCC/SWN to support development of the different models of environmental farming activity on the estate.

- **Realising the benefits of tenant environmental improvements beyond the lifetime of each tenancy**

16 (of 17) farm businesses interviewed had conducted soil testing on farm. A smaller subset of businesses also monitored carbon emissions, plant species, bird numbers or invertebrate numbers on farm. Farmers using this information to make environmental improvements on farm pointed to some of the challenges of making these changes on a tenanted farm. Three farm businesses pointed to chronic problems with soil mineral deficiencies or excesses, pH levels and/or pest and disease burdens caused by overstocking or mismanagement by previous tenants on their farms over many decades. These businesses were working to correct these issues on farm within the short timescales of their tenancies, however as they all pointed out, these challenges were impacting on their capacity to produce and was not something they would be compensated for improving.

“But unfortunately it's not something that can be addressed overnight. It's taken years. You know, years we've had to do some of it twice. To get the pH levels up to a level that it's actually worth reseeded. The cows won't eat sour grass and the sour grass will grow on sour soil. Yeah, it doesn't matter if it's new grass or old grass. Like I say it's taken us five years.” CU42b



Some tenants pointed to the challenges of implementing changes with the potential to deliver longer term benefits on short tenancies, or towards the end of tenancies. Some tenants were interested in taking up actions within their SFI agreements to reduce the trimming of hedgerows but worried that they would be penalised on exiting the tenancy as the uncut hedges would be considered a dilapidation. One tenant described how they had been penalised for environmental actions upon leaving a starter farm. They said:

“What we found was that all of our environmental practices that we had on changing the farm tenancies, it was completely ignored and we were actually dilapidated on something that we had an environmental plan [for]... They were seen as a negative and a dilapidation and like we've neglected... [we lost an enormous sum]... And you know then somebody came in with a Swale and ... everything was just literally swaled and razed off all of the, you know, the lower input and the nature field we had... So it was very heart breaking.” CC03

Other tenants pointed to the lack of continuity between tenancies hindering longer term environmental improvements. One ingoing tenant described how the outgoing tenant had refused to sign over the Countryside Stewardship scheme associated with the CFE farm to them. Another disagreed with the outgoing tenants approach to hedgerow management agreed under a Countryside Stewardship Scheme and was looking to make significant changes.

Recommendation 13: Within the scope of **Recommendation 1:** strategy development, DCC to establish environmental ambitions for the estate within CFE strategy to help guide environmental action on CFE and avoid environmental actions being treated as dilapidations. Links fostered with CFE and DCC Environmental Performance Board.

Recommendation 14: Within the scope of **Recommendation 11: benchmarking**, DCC/SWN to explore models of Environmental FBTs to support those tenants who wish to, to take a higher level of environmental action on farm, be compensated for these actions and support the transition of these benefits to the next tenant.

[6.8 Overview of opportunities and tenant perspectives](#)

Tenants were asked to reflect on possible future pathways to building resilient farm businesses on the CFE. These possible future pathways were identified from policy and strategy documents identified during the policy review (see chapters 3 and 4). Tenants were asked to comment on how relevant these pathways might be for their CFE farm business and to elaborate on any support that might be put in place to encourage implementation. Figure 6.8 provides an overview of tenants' perspectives. Regenerative farming was viewed as the most possible future pathway by a majority of farmers, with agri-tech, alternative crops, tree planting and inviting the public onto the farm also ranking highly. Although not ranking as highly as some other options, green electricity generation was viewed positively by a majority of farmers although some had already explored this option and encountered infrastructure, funding or bureaucratic difficulties. Selling biodiversity and/or carbon credits was met with scepticism by CFE tenants, who noted that supply chain actors or future green taxes may require tenants to demonstrate their capacity for carbon storage and net zero farming.

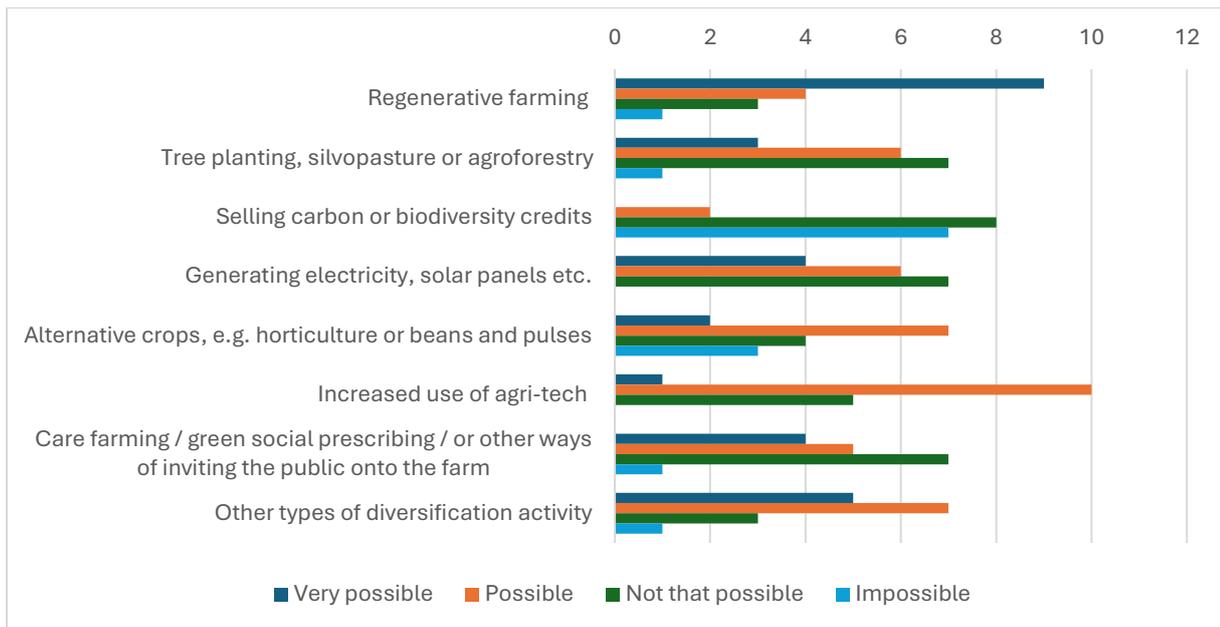


Figure 6. 15 Tenant perspectives on future farming possibilities

The tenants attending the workshop chose to explore three potential business resilience pathways in more detail. Workshop attendees considered the extent to which they felt a collaborative project with DCC to pursue these pathways on the CFE was viable and desirable.

Green energy generation pathway

Green energy generation was seen by workshop attendees to be a potential win-win for DCC CFE and tenants. The group felt this was an innovation pathway with potential but that it required the estate to lead. A successful CFE-wide project would require an estate-wide, long-term strategic view rather than individual farm-level, short-term tactical view. Tenants noted that DCC has expertise and convening ability to work across departments and local government agencies.

DCC would need to work with tenant farmers to establish most appropriate green energy option on each farm, for example solar panels, wind turbines or hydropower. Tenants noted that only certain buildings would be appropriate for installing solar panels, depending on the flammability of the items stored within. The group suggested that in many cases the capital investment required to make good the dilapidated condition of farm buildings to support solar panels on roofs would probably be a barrier to realising this pathway. This concern was also raised during interviews, where tenants had tentatively explored green energy generation but uncovered infrastructure related barriers.

“Would love to be able to do it, but again, the shed roofs that I want to use aren't suitable for it so. Yeah. I think it is something that is necessary because we're [such a] power hungry industry as well.” AB44

“Yeah, I'm very keen on that. I've got friends that you know will milk on solar panels in the summer, but again they bought their farm and they got 30-year projects with solar panels and the wind turbine and they got battery packs. You know, happy days... [on the CFE] you could do it, but we've obviously ... only got like one sort of new little shed we put up.



Everything else is all you know, 1970s, which is asbestos and not suitable for solar panels.”
GT11

Tenant workshop reflection: Workshop attendees noted that CFE tenants would not be able to finance the full costs of improving sheds in order to install panels and an innovative approach to funding infrastructure repairs that is fair and reasonable would need to be explored. Tenants hoped that a project of this type would contribute to DCC’s net zero ambitions while also providing an opportunity for tenants to benefit from reduced electricity tariffs.

Recommendation 15: DCC to lead estate-wide review of green energy generation potential and feasibility study.

Regenerative farming pathway

Workshop attendees discussed the potential for closer working between DCC/SWN and CFE tenants to promote greater regenerative farming practices on the CFE. It became evident that even within the small group there was no clear consensus about what was meant by the term regenerative farming, and although the option was seen as possible in the abstract, at the individual farm level interest was very varied. Definitions ranged from a total absence of productive farming, to increasing yields with less inputs. These definitional challenges were also raised frequently by interview participants.

“Well, we’re sort of. You know, with the herbal leys. We’re sort of heading that way, yeah. I wouldn’t say I’d go the whole lot. What do you mean by regenerative farming? So we’re trying to, we were thinking about putting herbal leys in before the SFI anyway, [to reduce] our input costs.” CU42a

As demonstrated in section 6.7, while the majority of CFE tenants are implementing some low input farming techniques, the number of farm businesses that would describe themselves as regenerative is much smaller.

There was a range of views as to the practicality of regenerative farming in the south-west of England, with some saying it was applicable and others saying the heavy soils, heavy rain and relatively small size of farms made it impractical. There was a general concern that a regenerative farming pathway could be imposed on farmers and disrupt individual farm business’s approach and viability. There was doubt that DCC/Councillors/SWN had sufficient in-depth and relevant farming knowledge to really support and evaluate farmers’ actions towards more sustainable farming. The group agreed that improving profitability was a shared goal, but were cautious of farming ideologies that suggested or imposed abstract prescriptions regards farming practices.

Recommendation 16: Estate-led efforts to encourage regenerative farming practices on the CFE should be permissive (i.e. encouraging those farm businesses interested in pursuing regenerative farming) rather than directive (i.e. imposing management decisions across farm businesses).

County Farm Estates’ food for County’s schools pathway

Workshop attendees agreed that producing good food sustainably was a shared priority for attendees whatever the farming activity and approach. The group identified this third social and economic innovation pathway around leveraging the CFE ‘brand’ to provide food through public procurement channels for Devon schools (and other public institutions). Devon county farms



providing food for Devon County School meals was seen as adding real value to CFE and setting exemplar which would benefit both DCC and CFE farm businesses. Attendees noted that enabling local food production through public procurement a government policy objective, recently reaffirmed by Secretary of State Steve Reed at NFU conference [cite]. Tenants noted that this would need to be led by DCC in consultation and collaboration with CFE tenant farmers.

During interviews tenants also reflected on the possibilities for their farm businesses to grow alternative crops and pursue alternative routes to market, such as public sector supply chains. Tenants noted the need for reliable routes to market to ensure confidence to produce, but also that there would be implications for on-farm infrastructure.

“You know, there's a lot of really good farms that do a lot of direct sales and they should definitely be supporting those or utilising those, so some form of local sourcing policy would be brilliant... But like I've wanted to do other alternative crops before. And we don't have grain storage on the farm. So my husband's like, well, where are you going to store it? ... They're not going to want to look after [two trailer loads] of some random crop I've come up with, but I do think it's possible and when you look at the whole ... farm wild or whatever the different options are. Yeah, I think that is a possibility for the estate going forwards, yeah.” BR57

“So we could be doing a lot more, each Council farm could be aligned with a local school. And you and you work with that school, and you can have the kids down at certain times of the year ... we could be providing food for the school canteens and the prisons and the hospitals, and that there could be lots of different things.” IN90b

Recommendation 17: DCC in conjunction with Devon Food Partnership to lead feasibility study into County Farm Estates' food for County's schools procurement project.

6.9 Other future possibilities discussed in interviews

- **Increased use of Agri-Tech**

Tenants tended to view an increase in deployment of agri-tech on farm as possible in future (refer back to Figure 6.8). However, the challenges of financing investment in agri-tech on the short timescales of typical starter and progression FBTs was a common theme.

“And then you've always got to get the return on it. And obviously I've only got 8 years left now. I mean, most things in farming are at least 10 to 12 years [to] pay.” AB44

“Some things which are a little bit beyond us. Yeah, everything's gotta be able to pay itself back rather quickly at the minute. So it's something that maybe in a couple of years' time wouldn't be such an issue, but at the minute it is.” EZ89

- **Carbon and biodiversity credits**

As indicated by Figure 6.8, tenants tended to view selling carbon or biodiversity credits as 'not that possible' or 'impossible.' Tenants were understandably cautious about engaging with emerging carbon or biodiversity credit schemes when in future their supply chain, the landowner and the Government might all want them to demonstrate their ability to sequester carbon.



“That element of it, I think the whole point of farms trying to store more carbon from like a public goods standpoint is right. You know, more carbon we store, the better off my farm is as well. You know, I'm going to increase fertility and I'm going to be better for doing that because the actions to get to that point are improving my bottom line. But it on the flip side of the negative of that is I'm not sure about the carbon selling and trading especially as a tenant farmer.” TL17

The few tenants who were more positive about the possibility caveated this by pointing to the need for stronger collaborative working relationships with CFE management and well-designed legal agreements if carbon or biodiversity credit schemes were to be viable.

Additionally, tenants were broadly sceptical about the ability of current carbon measurement methodologies to accurately capture carbon sequestration on farm. Some tenants had participated in a DCC led project to measure carbon emissions on the CFE but were left disappointed by the method of sampling fields in the farm and inaccuracies within the survey (e.g. underestimate of trees on farm). They did not feel there were sufficient opportunities to comment on and refine the survey on their farm to make the final estimate more accurate.

Tenant workshop reflection: Tenants were unclear as to how they would be able derive the benefits and financial compensation from biodiversity /net-zero initiatives but worried they would in time be expected to engage with this development.

- **Inviting the public on to the farm**

Tenants tended to view the future pathway in which the public are invited onto the farm as ‘very possible’ or ‘possible’ (see Figure 6.8). Many pointed to the proximity to local schools and the possibility of hosting school visits for young people to learn more about farming. However, a significant proportion of tenants interviewed worried about the capacity of their farm to host the public safely.

“It's not the facility, it's the safety around here at the moment and this is the problem. We've got open septic tanks and all sorts here at the moment that we're having to sort out so.”
TB40

- **Tree planting, agroforestry or silvopasture**

Again, tenants tended to view the future pathway in which increased tree planting takes place on their CFE farm as ‘very possible’ or ‘possible’ (see Figure 6.8). However, tenants pointed to their short tenancies on the CFE and worried that it would be difficult to appreciate the benefits of an agroforestry project.

“I think it gets difficult on a tenant farm. Because if you make a plan and you plant all these lovely, lovely trees like and you move out in five years. You ain't gonna see the benefit, are you? But I get it for somebody who goes into a 20-year tenancy or buys a farm, basically. So I think it's difficult. Yes, it ticks a lot of boxes for Devon County Council, but it's difficult to for farmers on a 7-year tenancy to get really excited to do stuff when you know you know the end is in sight.” GT11

New entrants on starter farms also mentioned that discussions about identifying places on farm to plant trees were taking place too soon after they had arrived on farm. While they understood DCC's



ambitions to plant more trees, new entrants needed more time to get to know their farms and identify the appropriate places for tree planting to take place.

“The whole, like, giving you a startup farm was all very good, but then within 5 minutes ‘we’d quite like this little bit and that little bit, that little bit to put trees on.’ Well, hang on a minute. I haven’t been [here] even 5 minutes. I’ve no idea.” AW13

Other tenants, while generally supportive of tree planting projects on farm, pointed to the ability of the CFE to sequester carbon through other farming practices. These tenants called for a broadening of goals within DCC nature, climate and farming strategy to encompass a wider range of farming activity to sequester carbon.

“And [DCC] said that they’ve got a tree planting initiative because [they] have decided they want to be net zero ... and I just think this blanket ‘we’ll just plant some trees.’ It’s really lazy... because yeah, the tree’s obviously [a] great sequesturer. But farms, we can sequestrate incredible amounts. And that’s not accounted for... I suppose that’s what’s the narrative, isn’t it? Nationally, that trees are good and kind of that now farming is bad. But [DCC are] in a sort of position really to inform the conversation better, to educate the councillors and just choose the strategic position of the County Council.” IN90b



7.0 Conclusions and summary of recommendations

The findings of this research point to the challenges and opportunities for tenant farmers on the County Farm estate as they transition into a new and, at times, uncertain policy environment. Some of the challenges highlighted by this report are systemic and common to many Local Authorities and landowners with large estates, however tenants on the CFE have pointed to a range of opportunities for building tenant farm resilience giving DCC the opportunity to develop exemplary estate management in this area.

In particular, research findings point to the following challenges:

- Investing in estate infrastructure is a known challenge for tenants and landlords alike with CFE tenants conscious of the constraints on DCC finances. The length of tenancies and the time it takes to resolve ingoings/outgoings fees also serve to discourage capital investment. Tenants felt there was little flexibility within current resourcing to explore collaborative projects on the estate. There are also particular challenges for tenant farmers of engaging in capital grant schemes and accessing private finance. This points to the need for an innovative funding mechanism to be developed to support ongoing investment on the estate and/or the release of capital by restructuring estate holdings. Changes to the ingoings/outgoings process and typical tenancy length may also help build confidence to invest.
- Environmental actions on farm are constrained by the perception that certain activities may be treated as dilapidations at tenancy end. Building confidence in the value of environmental goods and services to the CFE would encourage those tenants interested in pursuing enhanced sustainable farming practices. Building a permissive approach to environmental farming on the estate could include clear ambitions within a County Farm estate strategy and the use of Environmental FBTs for those tenants who are interested, without imposing directive conditions on all CFE farmers.

Research findings also point to a number of opportunities:

- A plethora of advice and support is available to farmers and many CFE tenants are confident at accessing advice when they need it. However, tenants did point to certain times in their farming career and certain topics for which they were less confident at accessing advice and support. Tenants were keen to revive peer networks on the estate in order to share knowledge and learning within and outwith the estate. Tenants also pointed out that more frequent farm walkarounds by the CFE committee members and SWN could help to exchange understanding of tenant businesses and their engagement with SFI actions.
- CFE tenants were interested in opportunities to collaborate with DCC and contribute to strategic priorities. Tenants pointed to green energy generation and supplying sustainably produced food for public sector supply chains in particular as potential projects for CFE tenants to collaborate, contribute to the provision of social and environmental goods and also build farm business resilience.



Appendix A – Preliminary policy review: overview of relevant reports and schemes

Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
Local strategies, plans and guidance				
Climate Adaptation Strategy for Devon, Cornwall, and Isles of Scilly	Prepared by RSK (including ADAS and WRc) with the Devon, Cornwall, and Isles of Scilly Climate Impacts Group	2023	Ongoing	p34 - mitigation and adaption actions for farm businesses: NEB5 Adapt agricultural land use through Environmental Land Management Scheme (ELMs) and Biodiversity Net Gain funding (e.g. buffer strips, conservation areas etc.). NEB6 Develop alternative water supplies (e.g. boreholes) and use of rainwater harvesting and storage (ponds/reservoirs) on farm. Put in ponds, swales, and wetlands. Also actions for Local Authorities and other institutions relating to farmers & farmland p106: NEA1 Water management strategy / NEA4 Carbon Management strategy / NEA5 Nature Recovery Strategy NEC2 Facilitate landowners connecting with local nature groups
Devon Agri-Tech Accelerator (DATA) Project - Sector Research and Mapping Report	Devon County Council	2022	DATA ongoing	Notes specific challenges for tenant farmers looking to invest in agri-tech: including negotiating investment between tenant and landlord, tenant lack of capital for investment p58 - 61, p66-68



Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
A REVIEW OF DEVON FARM ADVICE	Ash Futures	2022	N/A	Specific challenges for tenant farmers not covered by this report. Challenges in accessing reliable advice particularly around carbon emissions and nature recovery likely to be broadly in line with wider Devon sample?
Trees for Devon: Devon's Tree and Woodland Strategy and Action Plan	Trees for Devon	2024	Ongoing	Not specifically tailored to tenant farmers. Broader farming related recommendations (not necessarily applicable to tenant farmers on short term tenancies) include: E4.2 Advise farmers and landowners on the opportunities afforded by private finance. This could be through farmer cluster groups, workshops, or distribution of information. IM 1.3 Raise awareness of the funding available to landowners for woodland management as part of the resources developed to support engagement with landowners and farmers. Signpost landowners to resources which explain woodland management. I2.5 Develop a 'How To' guide for farmers who want to increase the recreational and educational use of woodlands on their land. D3.3 Identify and distribute an opportunity mapping tool which makes it easier for farmers to design and plan tree planting e.g. the Land App. This tool could be explained through cluster groups.



Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
DEVON'S GOOD FOOD STRATEGY 2023 - 2028	Devon Food Partnership	2023	Ongoing	<p>6.4 Use the county farms estate to demonstrate best practice</p> <p>Actions to support farmers include:</p> <p>4.1 Promote buying locally produced food from local businesses</p> <p>4.2 Work with initiatives that support local food businesses, including Future Farming Resilience and the Heart of the South West Growth Hub</p> <p>4.3 Continue to support farmers on the journey to carbon neutrality and increased biodiversity</p> <p>5.2 Support organisations that improve access to market for smaller SME farmers, growers and food manufacturers</p> <p>6.1 Support farmers and fishers through the transition to more sustainable practices through high quality, well-coordinated advice provision</p> <p>6.3 Help farm businesses achieve a fair price for sustainably produced goods by promoting access to local, premium, and natural capital markets</p>
Devon Carbon Plan	Devon Climate Emergency	2022	Ongoing	<p>F10. Explore how the County farms estate could be used to demonstrate low-carbon agriculture.</p> <p>F7. Look to set-up a Devon Farm Advice Service.</p> <p>F8. Support development of on-farm anaerobic digestion of agricultural wastes.</p> <p>F9. Support the testing and adoption of low-carbon agricultural practices</p>
Devon Local Nature Recovery Strategy – a joint strategy for Devon, Plymouth and Torbay Overview Project Plan	Devon Local Nature Partnership	2024	Ongoing	<p>LNRS will include:</p> <p>A Description of the area and its wildlife Opportunities</p> <p>Priorities for restoring wildlife</p> <p>Actions need to achieve the wildlife priorities and also achieve other socio/economic priorities such as food control, clean water, improved health and wellbeing and carbon sequestration (through nature based solutions).</p> <p>A Map – showing areas of existing importance for wildlife and areas where we want to focus action.</p>



Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
Devon Future Farming Resilience offer	Devon CC	2024		Local offer to support farmers to navigate new payment schemes.
Government strategies, guidance and payment schemes				
Rock Review	UK Gov	2022	Previous Govt. but ongoing	<p>Rock Report identifies emerging issues for tenant farmers vis-a-vis the changing policy environment which include:</p> <ul style="list-style-type: none"> - tenant farmer eligibility to sign up for SFI without landowner permissions (largely resolved by DEFRA, however perception of ineligibility may remain) and landlord should not be able to enter tenanted land into schemes unilaterally - inflexibility of standard FBTs and the need to widen perceptions of agricultural practice and good husbandry to ensure tenant farm viability. Tenants should be able to diversify without the landlord unreasonably refusing consent. FBTs of longer than 8 years should be the norm - the need to build collaborative relationships between tenants and landowners to enable longer term environmental actions on tenant farms - Suggests action to promote greater flexibility for tenants to apply for tree planting schemes on farm - Suggests requirements for natural capital improvements on farm to be a standing feature of FBTs, that DEFRA develop guidelines to ensure the benefits of building natural capital on farm are shared between landlord and tenant - Changes to tax incentives to encourage longer term lets, tenant entry to schemes, improved tenant and landlord behaviour, and investment in the holding - Recommendation 29: It should be made possible for a public landlord, such as county councils, to make an application for an investment jointly with their tenants. - Recommendation 40: The government must do more to support County Councils to maintain their land assets for new entrants and the long-term security of the tenanted sector.



Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
Government Response to the Rock Review	UK Gov	2023	Response from previous Govt.	Broadly supportive of the Rock Review, particularly in terms of the design of agricultural payment schemes and access for tenant farmers. Some recommendations, for example reclassifying agroforestry so this is not considered a change in agricultural use were not supported. However, this response also established the Farm Tenancy Forum and defers some longer-term recommendations to this body for consideration.
Reviving county farms	CPRE	2019	N/A	Research exploring the status of England's county farms and measuring the decline in hectareage since 2010. Findings include: Overall size of County Farm estates in England declined by 7% since 2010 Many councils see County Farms as an anachronism and are selling off land Others point to their County Farm estate as important for the delivery of environmental and social goods and services. Ambitions for more joined-up approaches to public sector procurement within CFEs so far not been realised.
Reimagining council farms: a vision for 2040	CPRE	2022	N/A	Explores the opportunities and barriers to making best use of County Farm estates from perspectives of Councils, farmers, community. Includes: - Observations that councils could do more to build collaborative networks for tenants to share knowledge, equipment, access public sector procurement opportunities etc - councils could do more to foster best practice in sustainable farming on tenant farms - council holdings could be parcelled up more flexibility to encourage innovative starter farms, collaboration across farms and different tenancy models - Discusses barriers to accessing farming from new entrants, barriers to retirement



Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
Survey of tenants	TFA	2024	N/A	Survey of tenant farmers conducted by the TFA (n= 425). Asked respondents to agree/disagree with a set of statements about their landlords/land agents and about mechanisms to deal with agricultural tenancy disputes. Broad findings included: Only around one third of respondents agreed they had good relationships with their landlords whereas 38% disagreed. 21% of respondents strongly disagreed that they had good relationships with their landlords. 70% of respondents disagreed with the statement that they had regular meetings with their landlords and nearly half didn't think that their landlords were easy to contact and speak to.
Tenanted Farms and Woodland creation	Forestry Commission	2023		Identifies the barriers to increased tree planting on tenanted land. Suggests there is sufficient evidence on the legal and economic barriers, but there is less research exploring integration of trees on agricultural land, the aspects of landlord tenant relationships which make tree plantings viable. Grey area of where trees can be considered under the definition of 'agricultural use'. Lack of precedence for sharing financial benefits, compensation for tenants for trees planted etc. More research needed on fostering collaborative landlord-tenant relationships.



Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
Sustainable Farming Incentive	DEFRA	2024	Ongoing	<p>Some of the criticisms of the inaccessibility of SFI for tenant farmers have been addressed:</p> <ul style="list-style-type: none"> - If you're a tenant farmer, you can apply for SFI. We ask that you must expect to have management control of the land entered into your SFI agreement for its 3-year duration. - Only a tenant can enter land (including hedgerows, where relevant) occupied under a tenancy agreement into an SFI agreement. This is because they're the person actively farming the land, not the landlord. - You can leave SFI without penalty if your circumstances change unexpectedly. - To apply for SFI, a tenant does not have to obtain or prove landlord consent. - Even if your landlord has already entered some of your tenanted land into a CS or SFI agreement, you may also be eligible for another agreement provided the same action is not being funded twice and the options and items are compatible with each other (on the same parcel of land). <p>Source: https://defrafarming.blog.gov.uk/2024/02/19/w-e-binar-follow-up-the-offer-for-tenant-farmers/</p>
Funding for farmers and land managers overview	DEFRA	2024	N/A	Overview - see other items for detail.
Countryside Stewardship Scheme	DEFRA	2024	currently closed	<p>CS mid-tier closed. Equivalent mid-tier grants can be applied for under SFI. Higher tier under review and likely to be restricted to the most environmentally important land, such as sites of special scientific interest, commons and woodlands.</p> <p>When CS Higher Tier opens, there will be a range of actions to carry out more ambitious environmental activities. Specialist advice from Natural England or the Forestry Commission will be needed to apply.</p>
Capital Grants	DEFRA	2024	Capital grants still open	<p>Capital Grants are 3-year agreements offering capital items to achieve specific environmental benefits in 4 groups:</p> <ul style="list-style-type: none"> boundaries, trees and orchards water quality air quality natural flood management <p>Applications open at any time of the year from 3 January 2024.</p>



Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
Landscape Recovery	DEFRA	2024	currently closed	Landscape Recovery pays groups of farmers and land managers to do long-term, large-scale projects together. Land must be in England and consist of at least 500 connected hectares.
Farming Investment Fund	DEFRA	2024	currently closed	The following grants are available under the Farming Investment Fund (FIF): Farming Equipment and Technology Fund (FETF) Water Management Slurry Infrastructure Adding Value Calf Housing for Health and Welfare Improving Farm Productivity Laying Hen Housing for Health and Welfare
Improving farm productivity grants	DEFRA	2024	currently closed	Available grants for capital items to improve farm and horticulture productivity through: - the use of robotic or automatic equipment and systems to aid crop and livestock production - wavelength specific LED lighting for horticultural crops - advanced ventilation control units - solar photovoltaic (PV) systems
Funding for farmers in protected landscapes	DEFRA	2024	Open - Protected landscapes only	The programme will fund projects that: - support nature recovery - mitigate the impacts of climate change - provide opportunities for people to discover, enjoy and understand the landscape and its cultural heritage - protect or improve the quality and character of the landscape or place
Funding animal health and welfare	DEFRA	2024	Open (some conditions no. of livestock etc.)	Funding for a vet, or a team chosen by a vet, to visit the farm if they are home to: - beef cattle - dairy cattle - pigs - sheep There are 2 parts to the service: - animal health and welfare review - endemic disease follow-up
Guidance livestock farmers	DEFRA	2023	N/A	Overview - see other items for detail.
Guidance arable farmers	DEFRA	2023	N/A	Overview - see other items for detail.



Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
Woodland grants and incentives overview	Forestry Commission	2024	Open	Overview of grants available for woodland creation and tree planting on farm. As noted elsewhere, there are complexities for tenant farmers on short term tenancies wishing to explore tree planting on farm.
Farming Innovation Fund	UKRI	2024	Under review	<p>The programme's aims are to:</p> <ul style="list-style-type: none"> - help farmers, growers and foresters increase productivity, sustainability and resilience - reduce the environmental impact of agriculture and horticulture - apply agricultural research to provide real benefits for farmers, growers and foresters - use science to develop solutions for the practical challenges in agriculture and horticulture <p>To get funding, you must work in collaboration with a team.</p>
Catchment sensitive farming advice for farmers	Catchment sensitive farming partnership	2022	Ongoing	<p>Catchment Sensitive Farming Advisers provide specialist advice for farmers on:</p> <ul style="list-style-type: none"> • Soil management • Nutrient, slurry and manure management • Ammonia reduction • Farm infrastructure and machinery set-up • Pesticide handling • Water resources and natural flood management • Local environmental priorities • Land management • Agricultural transition, including grants



Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
Business Models to unlock future farming potential	AHDB	2022	N/A	Handbook explores different business models that can be deployed by farming entrepreneurs/landowners e.g. Contract farming Grazing licence Share farming Joint Ventures Partnerships/Companies Tenancies Community models & land trusts Co-operatives, & machinery sharing
Carbon and biodiversity credit schemes				
Woodland Carbon Guarantee	Forestry Commission	2024	currently closed	<p>The WCaG gives you the option to sell captured carbon from your woodland in the form of verified carbon credits, called Woodland Carbon Units (WCUs). You can sell WCUs to the government for a guaranteed price every 5 or 10 years up to 2055 - 2056. The government will buy the WCUs for an agreed guaranteed price that is index-linked for the life of the contract. This provides an additional long-term income from your woodland.</p> <p>WCUs are generated through verification checks carried out under the Woodland Carbon Code (WCC), which assesses how the woodland has grown and how much carbon dioxide has been captured.</p> <p>The WCaG is not a grant or a fund and it does not contribute towards the cost of woodland creation planning, establishment or early maintenance. Tenants need landowner permissions. Difficulty longterm scheme vs. short term tenancy - benefits of scheme peak at 25 year mark. (Source: FW, https://www.fwi.co.uk/business/payments-schemes/carbon-credits-explained-long-term-income-option-for-farmers)</p>
Woodland Carbon Code	Forestry Commission	2022	See above	
Getting started with the woodland carbon guarantee	Woodland Carbon Code	2023	currently closed	
Woodland creation carbon leaflet	Forestry Commission	2022	See above	
Trees on farms	Forestry Commission	2023	N/A	<i>Overview leaflet</i>



Document name	Author	Date	Status (Dec 2024)	Summary: relevance to County Farms
UK Nature Fund	Finance Earth & Federated Hermes	2024	Ongoing	<p>From website: UK Nature is an institutional-scale private markets fund investing across a range of UK Nature-based Solutions ('NbS') and related nature markets. UK Nature can support impactful nature restoration projects capable of generating long term income for landowners and land managers through a variety of structures.</p> <p><i>Emailed for advice re. tenant farmers, response: The UK Nature Impact Fund aims to support nature-based solutions projects across the UK, and intends to work with landowner and/or tenant farmer to deliver these. We anticipate that most of the projects will focus on woodland creation, peatland restoration and Biodiversity Net Gain.</i></p> <p><i>We'd be delighted to work with tenant farmers so they can benefit from long-term revenue streams from carbon and biodiversity, and get paid to manage the sites where appropriate. Due to the long-term nature of the management agreements required for such projects (typically 30-100 years), we would need the freeholder also signed up where tenancies do not extend this far.</i></p>
The UK Nature Accelerator (DEFRA funded)	Finance Earth & Federated Hermes	2024	Ongoing	<p>From website: The UK Nature Accelerator is the technical assistance programme for Nature-based Solution projects in the UK. Delivered by Finance Earth's advisory team on behalf of the UK Government, the Accelerator will provide early-stage financial and technical support to create shovel-ready NbS projects suitable for UK Nature investment.</p>
Biodiversity net gain advice for land managers	DEFRA	2024	Ongoing	<p>Biodiversity net gain (BNG) is a way of creating and improving natural habitats. BNG makes sure development has a measurably positive impact ('net gain') on biodiversity, compared to what was there before development. Developers must deliver a BNG of 10%. This means a development will result in more or better quality natural habitat than there was before development. Tenant farmers can sell BNG credits on land they farm with the landowners permission.</p>
Sell biodiversity units as a land manager	DEFRA	2024	Ongoing	



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Combine BNG and nutrient mitigation	DEFRA	2024	Ongoing	<p>You can sell biodiversity units or nutrient credits, or both, from a piece of land if you are:</p> <ul style="list-style-type: none"> - the landowner - the long-term leaseholder - the tenant farmer - a business or organisation that carries out habitat creation or enhancements <p>You can create nutrient credits by reducing or capturing nutrients that would otherwise end up in protected water bodies.</p> <p>Both biodiversity and nutrient credits can be stacked on the same piece of land with different sustainable farming award payments such as SFI.</p>
Hedgerow carbon code	Allerton Trust funded by NEIR fund	2024	<i>Pilot ended - no update available.</i>	Development of the Hedgerow Carbon Code to measure the additionality offered by new hedgerow plantings and maintenance and develop a framework for selling hedgerow carbon credits.
Agroforestry carbon code	Soil Association funded by NEIR fund	2024	<i>Pilot ended - no update available.</i>	Project to scope and explore the potential for the carbon captured and stored by trees in agroforestry systems to be quantified and potentially used to support the net zero strategies of farmers, land managers and their partners and funders.
Agreena Carbon Programme	Agreena	2024	Arable farmers only	From website: Transition to more regenerative farming practices to earn valuable carbon credits through AgreenaCarbon – the largest soil carbon programme in Europe.
Soil Capital Programme	Soil Capital	2024	Arable farmers only?	From website: Many farmers are already receiving carbon payments. We are open to all arable farmers, conventional or organic (some livestock is permitted) in France, Belgium and in the UK. Our agronomists will support you in the adoption of regenerative agriculture practices.
Trinity Natural Capital Markets	Trinity	2024	All farming types	Carbon credit market and carbon measurement tool.



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Forest Carbon	Forest Carbon	2024	Ongoing	From Website: Carbon funding exists in the UK to help support the creation of new woodlands and the restoration of degraded peatlands. Since 2006, Forest Carbon has been helping land managers access this funding. <i>Emailed for more information. Email response: These Codes exist to facilitate projects by helping to cover the costs of woodland creation or peatland restoration, and projects are subject to eligibility and additionality requirements. Tenant farmers can take projects forward with the landowner's consent and the appropriate agreements in place.</i>
Tilhill	Tilhill	2024	Ongoing	From website: CarbonStore, a business stream of Tilhill unites landowners and environmentally conscious organisations to help offset their carbon emissions by creating new woodlands and restoring degraded peatlands right across the UK. An end-to-end service that absorbs CO ₂ , helps protect our environment and enhances our countryside. <i>Emailed for information. Generic response returned.</i>
Carbon Store UK information for landowners	Carbon Store	2024	This is the engagement portal from the Tilhill scheme	
Environment Bank		2024	Ongoing	From Website: Our Habitat Bank model is simple; it involves leasing land, typically low-yielding, from which we co-create a Habitat Bank. We are looking for a minimum of 20 hectares, but in some areas of the country, we consider a minimum of 10. We raise Biodiversity Units for developers and take all liability for Unit delivery. Our farmers and landowners retain ownership and management of the land, and receive tax-efficient annual payments, usually between £20,000 and £60,000 per year, and in some cases substantially more. Payments are secure for 30 years – providing a consistent and reliable income. <i>Emailed for advice re. tenant farmers. Response: For our model, a 33-year lease is required, so it wouldn't be suitable for tenant farmers with shorter tenancies.</i>



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