

EXMOOR NATIONAL PARK
STATE OF THE PARK REPORT

CHAPTER 18. LAND BASED INDUSTRIES: FARMING AND FORESTRY

Vision for land based industries

Use of Exmoor's natural resources in ways which are economically and environmentally sustainable, providing opportunities for present and future generations of people among local communities to earn a living from the land whilst maintaining and enhancing traditional landscape features and wildlife habitats for public enjoyment.

Objectives and Indicators

Objectives relate to the Exmoor National Park Management Plan
Indicators may be shared with those from other plans or organisations

LP - Exmoor National Park Local Plan

BVPP – Exmoor National Park Best Value Performance Plan

AC – Audit Commission

CA – Countryside Agency indicators used in their 'State of the Countryside Reports'

RWP – The Government's Rural White Paper 'Our Countryside'

NPA – 'Headline' indicators developed by the National Park Authorities' Data Working Group

RO – Indicators developed for the South West's Regional Observatory

Objective 18/2

To ensure that traditional agricultural and rural skills such as hedge laying and stone walling are perpetuated, for the benefit of both traditional landscape features and the local work force.

Indicators:

Number of local rural craft businesses

Objective 18/3

To help farmers to meet the demand for local produce and other diversification options, and to maximise the opportunities to promote good practice for the integration of farming and the environment for an economically sustainable future.

Indicators:

Number of farming businesses in agri-environment schemes

Objective 18/4

To increase the manufacturing of sustainable products from Exmoor woodlands.

Indicators:

Number of businesses in woodland certification programme; number of businesses manufacturing sustainable products from Exmoor woodlands

Objective 18/5

To restore former semi-natural habitats on some areas currently utilised for forestry, and encourage the future development of forestry in areas where it will enhance the landscape and diversity of habitats and form a viable alternative to

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agriculture.

Indicators:

Area of heathland restored from plantation; area of New Native Woodland

HOW IS FARMING CHANGING ON EXMOOR?

Current situation:

Agriculture is the major land use of Exmoor

Nearly 90% of the area of farmland is grassland and rough grazing and sheep and cattle farms are the main enterprises

Trends:

Less land is being farmed

More land is being rented and less worked by landowners

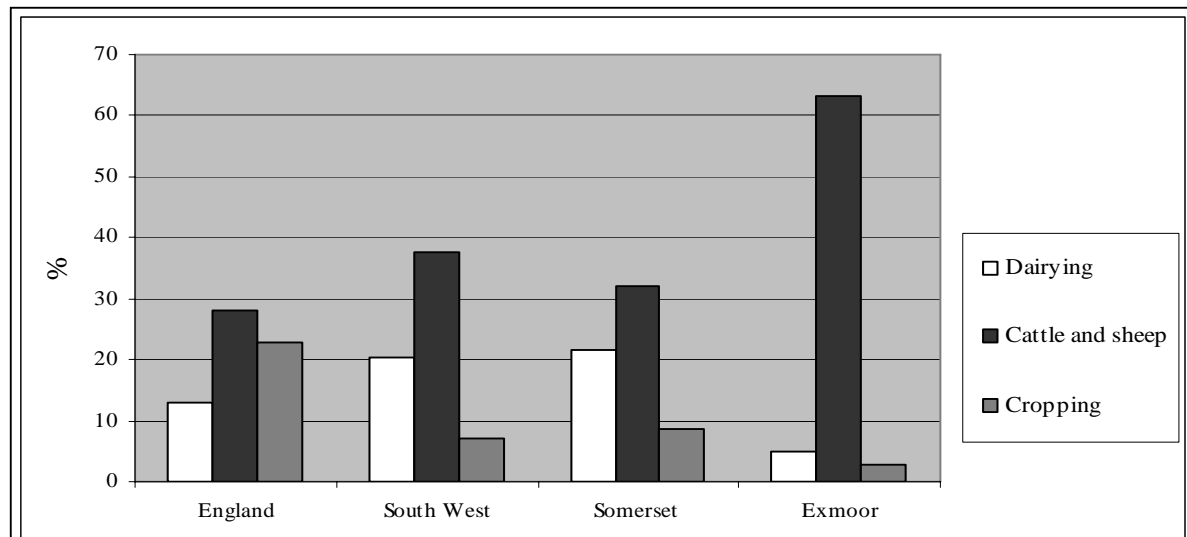
The number of middle sized farms is decreasing and the number of smallholdings increasing

Whilst farming is becoming more diverse individual farms are becoming more specialised

Beef cattle are increasing whilst other stock are decreasing in numbers

Of the 69,280 ha of the National Park, 38,724 is farmland and 19,023 ha is moor and heath which is also farmed. Thus over 83% of the National Park is farmed. About 74% is covered by agricultural holdings, the difference being largely accounted for by common land to which farmers do not have sole rights.

Exmoor has a greater proportion of sheep and cattle farming than the region or nation as a whole. The proportion of land under crops is particularly low compared with that for the nation.



Main farm types

In the ten years after 1990 519 ha of land went out of agriculture, to development, gardens, woodland and paddocks. The amount of land rented has increased, in the last few years, reversing a general downward trend. Many farmhouses have been sold with a few hectares of land which either go out of production or are rented to neighbouring farmers. There are fewer holdings with rented land, suggesting that the many smallholdings are more likely to be wholly owned and the few large farms more likely to rent land. In the West Country farms average 51ha in area, which is lower than the average of 73ha for England. Exmoor farms come in between at 69ha in 2000. They reduced in average size from 72ha in 1990 and 80ha in 1947. This reflects the drop in number of middle sized farms and increase in the number of smallholdings. The large farms, however, appear to be becoming larger.

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Agricultural land use change within Exmoor National Park. Source: DEFRA annual returns

Land use	Number of holdings		Area: hectares	
	1990	2000	1990	2000
Land rented	170	151	12,341	13,876
Land owned	546	583	39,157	37,103
Total crops/fallow	137	116	2,503	2,263
Permanent grassland (> 5 years)	561	552	30,987	30,987
Recent and temporary grassland (<5 years)	235	163	5,255	3,766
Rough grazing (sole rights)	231	177	11,058	9,984
Woodland	196	203	1,221	1,711
Set-aside	0	27	0	416
All other land	254	264	366	523

Changes in farm types within Exmoor National Park. Source: DEFRA annual returns

EC farm type	1990	2000
Cereals	8	12
Horticulture	9	16
Pigs and poultry	0	9
Dairy	26	14
Cattle and sheep (LFA)	358	261
Cattle and sheep (lowland)	69	116
Mixed	14	17
Other types	124	214

Changes in farm types within Exmoor National Park. Source: DEFRA annual returns

No. holdings engaged in:	1990	2000	Change
Cereals	137	116	-15.3%
Dairy herd	43	28	-35.0%
Beef herd	317	258	-18.7%
Breeding ewes	425	376	-11.5%

Production of cereals on Exmoor dropped by 16.5% between 1988 and 1996. However, this trend may change with increased demand for wheat and oilseed, production of which is already increasing on Exmoor, and Common Agricultural Policy reform proposals. Although overall production and number of holdings partly engaged in cereal production and horticulture may be lower, there is increasing specialisation in such types of farming and the number of farms wholly engaged in arable farming is increasing.

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Changes in arable farmland within Exmoor National Park. Source: DEFRA annual returns

Tillage and grass area: hectares	1990	2000
0<5	80	184
5<20	148	147
20<50	121	88
50<100	144	113
100+	127	127

Changes in area under crops within Exmoor National Park. Source: DEFRA annual returns

Crops: hectares	1990	2000	Change
Wheat	712	741	+4.1%
Winter barley	548	345	-37.0%
Spring barley	237	171	-27.8%
Other cereals (excluding maize)	0	222	
Total cereals (excluding maize)	1,726	1,478	-14.4%
Potatoes (early and maincrop)	31	12	-61.3%
Field beans and peas for harvesting dry	0	121	
Linseed	0	74	
Other crops and bare fallow	428	528	+23.4%
Horticultural crops	82	0	

In the West Country the dairy herd has shrunk by 20% since 1987 and the beef herd increased by 57%. This has been due to milk prices and subsidies. The decrease in to the dairy herd on Exmoor has been even more dramatic but the increase in the beef herd has been nothing like as great. There are many more stock now than there were 50 years ago and much less land in cultivation. In 1947 there were still nearly 1200 working horses on 400 farms on Exmoor and nearly 40,000 poultry. Now the figure for both is negligible. The number of pigs and goats has also significantly decreased. The big increase has been in the numbers of sheep, which have increased roughly tenfold in fifty years, although at present they are declining slightly in favour of beef cattle.

A major source of farm diversification on Exmoor, particularly on estates, is shooting. Apart from rough shooting, large scale breeding and release of birds for commercial shoots is a recent phenomenon but a major part of the rural economy, with about 2% of the pheasants bred in the UK being bred on Exmoor in 2005. About 270,000 pheasants and 72,000 partridges are shot on Exmoor in a season.

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Changes in livestock numbers within Exmoor National Park. Source: DEFRA annual returns

Livestock numbers	1990	2000	Change
Dairy herd	1,584	938	-40.8%
Beef herd	11,934	12,349	+3.5%
Breeding herd replacements (cows and heifers over 1 year for breeding)	3,254	3,552	+9.1%
Other cattle over 1 year	5,545	6,479	+16.8%
Cattle and calves under 1 year	12,398	11,589	-6.5%
Total cattle and calves	34,715	34,907	+0.6%
Breeding ewes	188,837	179,843	-4.8%
Lambs under 1 year	201,638	173,083	-14.2%
Other sheep	13,221	6,891	-47.9%
Total sheep	403,696	359,817	-10.9%
Breeding sows and gilts in pig	31	22	-29.0%
All other pigs	145	165	+14.8%
Total pigs	176	187	+6.3%
Total goats	384	114	-70.3%

WHAT CONTRIBUTION DOES AGRICULTURE MAKE TO THE EXMOOR ECONOMY?

Current situation:

A small proportion of those employed on Exmoor are employed in agriculture

Although there is a greater proportion of full-time farmers on Exmoor than nationally, nearly half of Exmoor holdings are part-time enterprises

Reliance on hill cattle and sheep farming systems results in a lower income than in the country and region as a whole

Farming is still important to the Exmoor economy, particularly in the grants it attracts, and direct support per Full Time Equivalent employee is high compared with the region as a whole

Trends:



The profitability of farming has decreased

Fewer people are being employed in agriculture

Farm incomes have decreased dramatically in recent years

About 13% of all business in the West Country are in land based industries. However, these businesses contribute under 3% of the region's GDP and only 2% of its workforce. All sectors of farming in the West Country have been

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in recession over the last few years. Although badly affected, hill farming has fared better than other sectors. Stock farming on Exmoor has been hit less badly than other types of farming because of subsidies within the Less Favoured Area. The hardest hit sectors have been dairying and lowland livestock farming. There is a huge variation in the economic performance of individual farm businesses, with a large proportion not following the general trend. Dairying is very much dependent upon economies of scale. In 2002 smaller producers were being paid 13 pence per litre for their milk whilst larger producers were being paid 19 pence. This contrasts with a standard rate of 25 pence per litre in the late 1990s when the Milk Marketing Board was operating. Only about 30% of milk producers were making a profit in 2002, all of them large producers. However, dairy farms have generally increased in size and efficiency and it is possible that over the last 20 years milk production has remained roughly the same whilst there has been a reduction in dairy holdings and dairy cattle.

The profitability of farms on Exmoor has decreased greatly in recent years although 2002 has seen an upturn in prices for stock. The dairy and arable industries remain depressed by low world food prices. With proposed changes within the EU, including an end to quotas, soon only a few large producers will be able to survive and effectively there will be no dairy industry on Exmoor. Dairying is mainly confined to the fringes of Exmoor: there are 42 dairy holdings in parishes wholly or partly within the National Park and 26 within the National Park itself.

- *Average Farm Net Value Added per Agricultural Work Unit from 1994/5 to 1996/7 was £21,900 (89.6% of England average). Sheep farming on Exmoor was only 33% of that in 1978 in real terms. Source: University of Exeter, A Review of the Somerset Farming Economy*
- *In the three years prior to 2000 farm incomes dropped steadily. In 2000 incomes rose in the West Country for the first time in 5 years. Average net farm income (NFI) rose by 21% to £11,991 per farm. However, allowing for inflation, this was still just over a fifth of income in the late 1980s. Source: University of Exeter Centre for Rural Research annual farm survey*
- *In 2000 average hill farm income in the West Country was £9,528. In real terms this was two thirds of the income in the late 1980s. Source: University of Exeter Centre for Rural Research annual farm survey*
- *In 1997/8 income on arable farms in the West Country was close to nil. It had improved to an average £7,150 in 2000. In the same year income on lowland livestock farms reached a deficit at -£827 per farm. Source: University of Exeter Centre for Rural Research annual farm survey*
- *Individual farms in Devon suffered financial losses of between £1,300 and £12,000 due to the foot and mouth crisis. Source: Devon County Council*

The number of persons employed in agriculture is in continual decline

Nationally the farm labour force has declined greatly over the last century. In England and Wales it dropped from 500,000 in 1951 to 130,000 in 1981. Exmoor has reflected these trends, although the rate of decline has probably not been as rapid. The percentage of persons employed in agriculture within the National Park has probably been declining for more than a century and continues to decline. Since census details have been available for the National Park area the proportion of the labour force living in the National Park and employed in agriculture has declined from 24.2% in 1971 to 21.5% in 1981 and 19.4% in 1991. The total agricultural labour force for the National Park area in 1997 was estimated at 1,883.

- *Between 1988 and 1996 the agricultural labour force of Exmoor dropped by 4.3%. This was less than the regional fall of 6.1%, the Somerset fall of 11% and the national fall of 12.7% over the same period. This is partly due to the prevalence of livestock farming and the limited potential for mechanisation it offers. Source: University of Exeter, A Review of the Somerset Farming Economy*
- *The fall in employment in agriculture has not been even over Exmoor. Between 1988 and 1996 it ranged from a loss of 17% in the central part of the National Park to a gain of 4.2% in the west. Source: University of Exeter, A Review of the Somerset Farming Economy*

The structure of the agricultural labour force is also changing, with a higher proportion of family labour involved and a great reduction in employees, particularly in full time helpers. Amongst the family labour, however, there is an increase in part time work and evidence of some over-employment. Many farmers are continuing to work after retirement age and the average age of the work force is increasing. Many part time farmers supplement their income by undertaking contractual work for other farms.

- *In 1998 31.3% of the Exmoor agricultural labour force was made up of full-time farmers, higher than the national average of 27.4%. Source: University of Exeter, A Review of the Somerset Farming Economy*
- *In 1998 52.7% of Exmoor farm holdings had at least one full-time farmer. However, of the 499 holdings*

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reporting full-time staff, only 409 would be classed as providing sufficient income for such. Source: University of Exeter, A Review of the Somerset Farming Economy

Agricultural labour changes within Exmoor National Park. Source: DEFRA annual returns

Labour changes:	1990	2000	Change
Farmers, partners, directors - full and part time	877	903	+3.0%
Managers and regular hired workers	328	207	-34.9%
Seasonal and casual workers	218	194	-11.1%
Total agricultural labour force	1423	1304	-8.4%
Full time employees	190	95	-50.0%
Part time employees	124	96	-22.6%

Exmoor farming is entirely dependent upon and influenced by grants and subsidies

With the exception of Carhampton and Withycombe, all parishes within the National Park come at least partly within Less Favoured Area (LFA) status. Most is in the Severely Disadvantaged Area class, with a fringe of the lesser Disadvantaged Area class around the edge of the National Park. Support to LFAs was until recently given through headage payments for breeding beef cattle and sheep under the Hill Livestock Compensatory Allowance (HCLA) scheme. In England as a whole it is estimated that the additional payments which came with LFA status represented 35-40% of Net Farm Income for those farmers. There were increased payments for beef cattle following the BSE crisis and hence the number of beef cattle on Exmoor has slightly increased in recent years.

Direct support payments to agriculture in Exmoor in 1996

Beef Special Premium (BSPS)	£2,385,000
Environmentally Sensitive Area (ESA)	£1,865,000
Arable Area Payments (AAPS)	£1,028,000
Suckler Cow Premium (SCPS)	£461,000
Sheep Annual Premium (SAPS)	£4,203,000
SAPS LFA supplement	£666,000
Hill Livestock Compensatory Allowance (HLCA)	£1,096,000
Other schemes	£271,000
Total Direct Support	£11,975,000
Total per farm holding	£13,373
Total per FTE	£10,200

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The Hill Farm Allowance Scheme (HFA) has now replaced HLCA and is payable on land area rather than livestock numbers. Modulation limits full payments to the first 350 ha of holding and 50% payments to a further 350 ha. In 2001 rates payable on SDA farmland were £34.40 per hectare and moorland £13.02 per hectare. There are 10%-20% enhancements for environmental measures, but this excludes farms which are within the ESA scheme, which is the majority of farms on Exmoor.

In addition to the DEFRA subsidies, various agri-environment schemes operate within the National Park.

Environmentally Sensitive Area:

Covers the whole National Park plus a small area to the south.

Total area covered by ESA (ha)	80,615	
Area of uptake at end of 1998	44,900	55.7%
Number of farms in scheme area	c.900	
Number of farms signed up in 2000	c.600	
Total ESA paid in 1999\00	£2,100,000	
Average per farm in scheme	£3,500	

Exmoor Farm Conservation Scheme:

This whole farm scheme is run by the National Park Authority.

Number of farms in the scheme in 2001	8	
Area of land covered (ha)	775.52	
<i>Of which</i> – moorland	109.94	14.2%
farmland	576.17	74.3%
woodland	89.41	11.5%
Number of agreements running in 2000	8	
Expenditure by Exmoor NPA in 1996/97	£120,000	
Expenditure by Exmoor NPA in 1999/00	£50,000 + £70,000 for termination of agreements	

Landscape Conservation Grant Scheme:

This is a scheme run by the National Park Authority which provides part grants towards conservation projects for which funding is not otherwise available. In 1999\00 there were 50 projects receiving about £37,000 from the Authority.

Management Agreements:

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This scheme was pioneered by Exmoor National Park Authority and now largely superseded by the DEFRA ESA scheme.

Number of agreements entered into	15	
Area of land covered (ha)	661	
<i>Of which</i> – moorland (12 agreements)	584	88.4%
grassland (3 agreements)	55	8.3%
woodland (2 agreements)	22	3.3%
Number of agreements running in 2000		
Expenditure by Exmoor NPA in 1996/97	£92,000	
Expenditure by Exmoor NPA in 1999/00		

Countryside Stewardship:

This is a scheme run MAFF which includes conservation and recreation measures on individual sites. Funding is given as both one-off capital payments and annual grants and totals are difficult to calculate. Currently there are 11 schemes in the National Park covering 457ha. This includes 4 agreements on moorland covering 146ha, 2 access only agreements on moorland covering 115ha and 5 agreements on farmland covering 198ha.

HOW IMPORTANT IS FORESTRY TO THE EXMOOR ECONOMY?

Wood and wood products are important to the national economy but Exmoor, along with much of the remainder of Britain, contributes little towards the balance of payments.

Britain has long been a net importer of wood and wood products. Since the First World War there have been attempts to address the imbalance. However, the country still consumes at least four times as much timber as it produces. If the country were to produce as much as it consumed and Exmoor were to contribute a proportionate share, 55% of the National Park would be covered with trees instead of the 12% cover at present.

- *In 2000 British wood production was 10.43 million cubic metres, whereas the country consumed 48.5 million cubic metres. Source: Forestry Commission*
- *In 2000 Britain imported £8,327 million worth of wood and wood products and exported £2,659 million worth. Source: Forestry Commission*

Forestry is not a major part of the Exmoor economy. However, it is a major land use and the jobs that it supports are not entirely linked to the economic value of the timber. Forestry also has a conservation, sporting and recreation value and all of these aspects create employment.

- *In 1999 there were 14,739 jobs in forestry and primary wood processing in England. It is not known how many similar jobs there are on Exmoor but, working on percentage area of woodland, Exmoor would support 113 jobs on the same basis. Given that Exmoor has a higher than average proportion of non-*

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productive woodland, around a hundred jobs would be more realistic. Source: Forestry Commission
National Statistics

- *In 1999, 151 businesses and organisations were identified as having an involvement with Exmoor's woodlands and wood products. 30 of these were within the National Park and 52 were within five miles of the National Park. They provided the following services: thinning, felling and abstraction (31.7%); advice (29.8%); fencing, hedging and banking (27.8%); planting and establishment (23.1%); craft and specialist market (21.9%); tree surgery (19.9%); consultancy (18.5%); forest management (17.2%); fencing materials (17.2%); weeding and chemical control (17.2%); charcoal and firewood processing (14.6%); static milling and processing (14.6%); tree and shrub supply (13.9%); drying and preserving (11.9%); chips and secondary products (11.9%); wildlife management (9.9%); construction and surveying (9.9%); machinery, tools and equipment (9.3%); arboricultural consultancy (9.3%); coppice working (7.9%); local provenance (7.9%); mobile sawmilling (3.3%). Source: Greater Exmoor Woodland Initiative Product and Services Directory*
- *Between 1998 and 2002, £660,000 was put into the Exmoor economy through the Forestry Commission's New Native Woodlands Challenge Scheme, which only operates in National Parks.*

Exmoor has a high potential for timber production. The average yield class of conifers in the UK is between 11 and 12. This means that throughout the life of a plantation an average crop of 11-12 cubic metres of timber will be produced each year. This is three to four times greater than the main timber growing countries of Scandinavia, Russia and Canada. In some of the more sheltered locations on Exmoor the yield class can rise to 20 or more. A factor against increased local production, however, is the high cost of production and the rapidly falling value of timber.

- *In 2001 standing softwood was fetching an average of £7.78 per cubic metre. Roughly 6.5 cubic metres of wood were being produced annually per hectare of softwood in Britain. On a percentage basis, the value of softwood on Exmoor would be roughly £154,000 per annum. This is likely to be higher, perhaps twice as much, due to the maturity and productivity of Exmoor's plantations. Source: Forestry Commission National Statistics*

In 2000 there were 15,121 fishermen in the UK, 19,000 people employed in the fish processing industry and 7,000 in fishmongers. The number of fishermen in England and Wales was 7,306. In 1938 there were 29,000. In 2000 the UK imported £1325 million worth of fish and exported £696 million worth. So fishing is an important industry nationally and demand outstrips production. Demand is relatively stable at present. The average British person, however, eats over 30 times as much meat as fish. Expenditure on fish is relatively high, however, as fish is more expensive than meat by weight.

Sea fish stocks are declining locally and nationally and quotas have been introduced to protect stocks. Between 1993 and 1997 10.1% of the UK fleet was decommissioned and 10% in 2001. A further 8.5% was announced in 2002 along with measures to reduce catches by 30-60%. There is evidence that reduction in fish stocks is reducing the amount of recreational fishing, which is locally important.

- *In 1992 commercially caught sea bass in the UK was valued at £2.9 million but it was estimated that £18.9 million was spent by recreational anglers in catching bass.*

In 1999 fish landings in the West Country were valued at £54.5 million. The region catches a large proportion of the nation's white fish. The Exmoor sea fishing industry is very small and confined to Lynmouth within the National Park. Both boats and catches are small but the catches are of relatively high value, concentrating on shellfish. Salmon trapping in the mouth of the Lyn has recently ceased. Salmon stocks have been in decline over the last 40 years but the Environment Agency has made considerable effort in restocking the Exe catchment, including the Barle. Catches vary considerably from year to year and it is difficult to assess short term trends from these. Rod licences for salmon have slightly decreased in recent years whereas licences for trout and coarse fish have remained stable. All types of trout appear to have relatively stable populations at present. Eels have reduced in numbers.

- *In the last operational year in 1998 19 salmon and 9 sea trout were caught in the trap at the mouth of the Lyn. Source: Environment Agency*
- *In the same year 181 salmon and 71 sea trout were caught by rod on the East Lyn. The salmon averaged 5.6lbs in weight - the smallest average for any river in the West Country. Source: Environment Agency*
- *Between 1987 and 1997 in Devon catches of salmon were reduced by 83% for net fishing and by 17% for rod fishing. Source: Devon Wildlife Trust*
- *In a four year survey of the Exe and its tributaries, it was found that 11% of the salmon population was caught by recreational anglers and 3% was returned. Source: Environment Agency*

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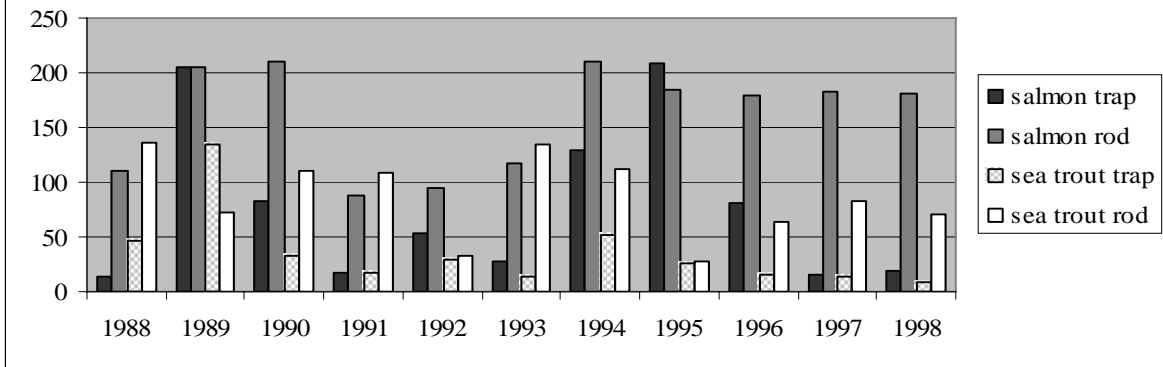
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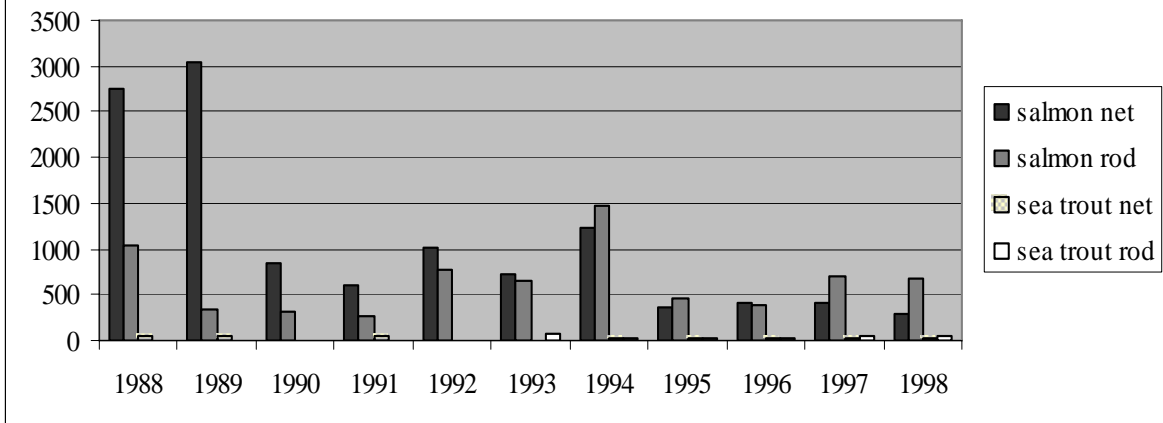
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- *In 2001 the Environment Agency issued 76855 rod licences for trout and coarse fishing and 4584 for salmon fishing in the South West. Source: Environment Agency*

migratory fish catches on the Lyn



migratory fish catches in the Exe catchment



There has been an increase in the number of fish farms within the National Park over the past 20 years. Until recently they were considered to be agricultural development and not subject to normal planning controls. Between 1986 and 2002 seven applications for fish farms were approved, four for new farms and three for extension or renewal of existing farms. However, such enterprises are notorious for failure and not all have survived locally. In 2002 there were three fish hatcheries within the National Park employing about a dozen full time equivalent staff. In addition there were three fish farms not hatching their own fish and about a dozen ponds stocked for commercial fishing. Fishing at reservoirs and on rivers is by licence and permit. It is not possible to separate the value of the Exmoor fisheries from the whole catchments of rivers which cross the National Park boundary.

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Actions

Some of these actions are objectives and actions from the Exmoor National Park Management Plan

Objective 18/1

To influence Government and EU agricultural, socio-economic and agri-environment policy for the uplands, with the intention of achieving a prosperous farming community that contributes to the achievement of National Park purposes.

Action 18/1

Undertake studies of agricultural economics and the rural skills needed to achieve the conservation of the farmed landscape

Action 18/2

Seek to continue Greater Exmoor Woodlands Initiative

Action 18/3

Respond to Government consultations and make recommendations to Government on socio-economic and agri-environmental policy for the uplands

NB The information contained in this report is based upon the best information available at the time. Although every effort has been made to confirm its accuracy and ensure that it has been used in the proper context, Exmoor National Park Authority cannot guarantee the accuracy of the information.