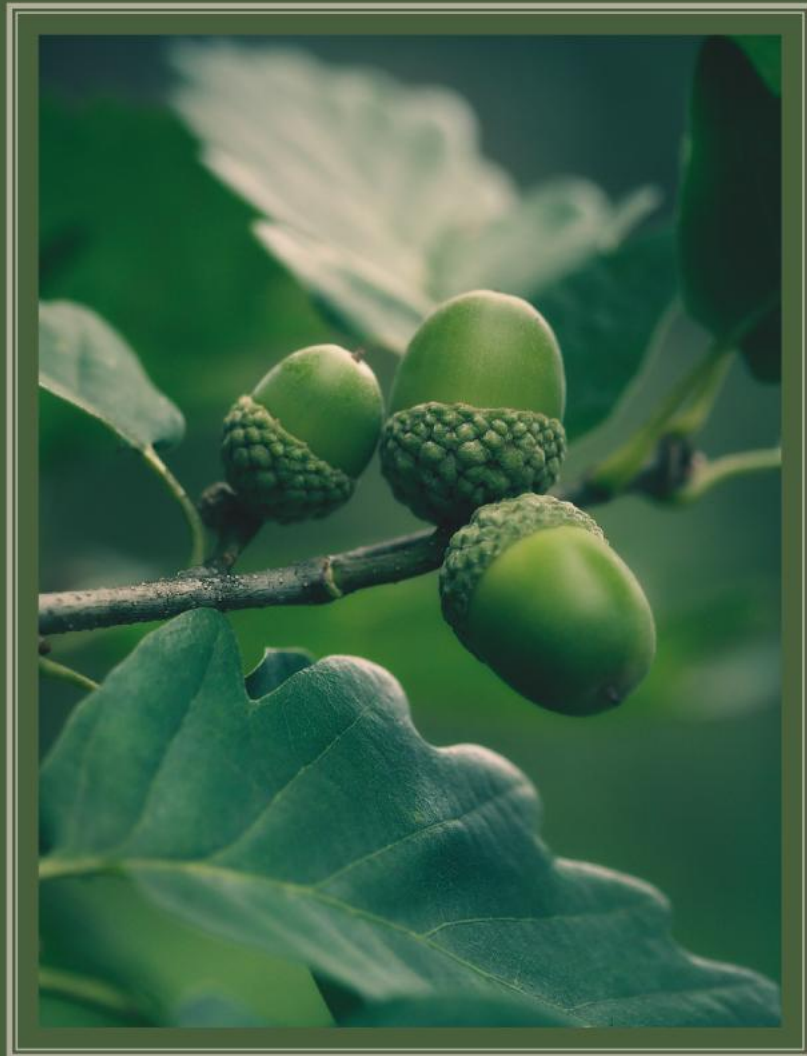


ASPECTS OF LAND

| Spring 2013 |



Growing your
business in a time
of change

savills

“The growing importance of food and energy security is driving innovation across the whole farming sector.”

Philip Gready, Head of Savills Rural



WELCOME

Our rural economy is changing. The growing importance of food and energy security is driving innovation across the whole farming sector. In this spring issue of Aspects of Land, we look at the key areas of change and reveal how estates and businesses can adapt and thrive. From green energy and GM crops to planning and investment, we hope you find our insights useful. If you would like to discuss any of the topics raised in this issue, and how they will impact on your business, we would be delighted to hear from you.

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A guide to the range of services offered by Savills Rural



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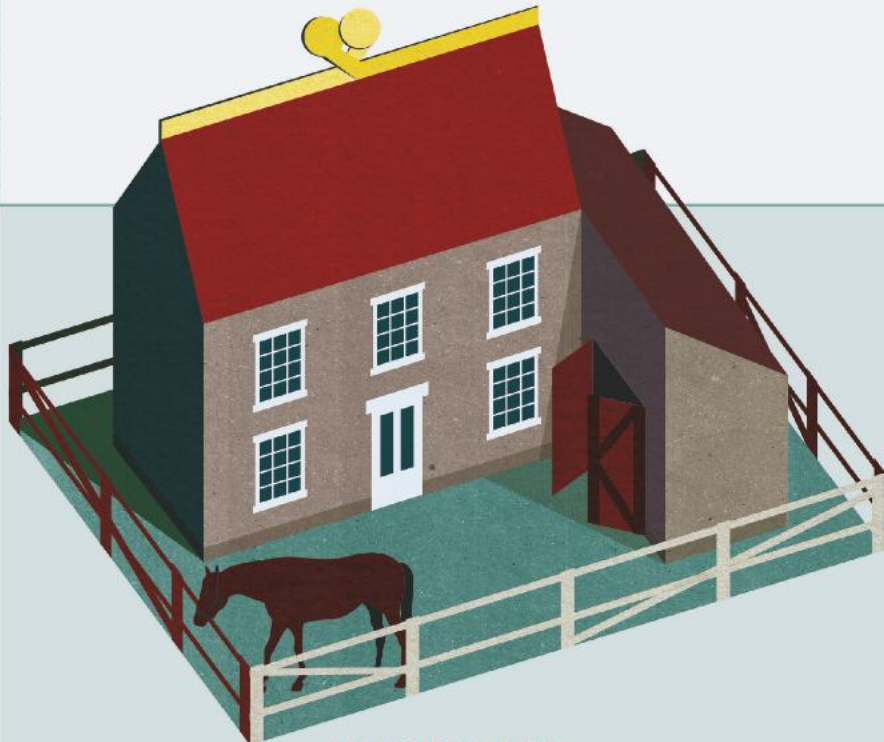
PLAYING BY THE RULES

Changes to tax rules mean an end to cash-in-hand payments for beaters

New tax rules have come in to force meaning shoot managers can no longer pay beaters and pickers-up cash in hand. "As part of the new Real Time Information system, employers are legally required to submit electronic returns of payroll data to HMRC each time they pay their employees, rather than sending a separate return at the end of the year," explains Jonathan Dymock of Savills Rural.

The onus is now on shoots to know the names and addresses of employees, as well as dates of birth and National Insurance numbers. Shoots will need to keep full records of payment to part-time staff, with cash-in-hand payments now banned. The new rules apply to everyone taking on casual labour, regardless of business size or length of employment. The HMRC guidance also warns that there are heavy penalties for non-compliance.

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A TAXING MATTER

Farm properties owned by corporations may be exempt from new tax

Farmhouses worth more than £2 million may be exempt from the new Annual Residential Property Tax (ARPT) if they form a large part of the business. The new charge is payable if a company, partnership or collective investment scheme owns an interest in a UK residential dwelling worth more than £2 million. The levy can be substantial, from £15,000 to £140,000, depending on the property's value. ARPT also has implications if a property is sold, placing the Capital Gains Tax automatically at 28%.

"The draft legislation includes reliefs designed to exclude businesses involved in

genuine commercial activity," says Clive Beer of Savills Professional Practice. "Farmhouses carrying out a farming trade and owned by companies and investment schemes will be excluded from APRT if they are occupied by a worker who is very involved in the business."

Farmhouses deemed "character appropriate" also qualify for relief. However, the phrase is open to interpretation, which could potentially lead to challenges from HM Revenue and Customs if a property owner uses it to claim tax relief.

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THE LEVY CAN BE SUBSTANTIAL, FROM £15,000 TO £140,000

THE MARKET IN MINUTES



ARABLE

Wheat and oilseed rape yields in 2012 were down 14% on 2011 to 6.7 and 3.4 tonnes per hectare respectively. Feed wheat prices continue rising, up 23% in the past year. However, oilseed rape prices are now similar to a year ago but with volatility of £20 either way.



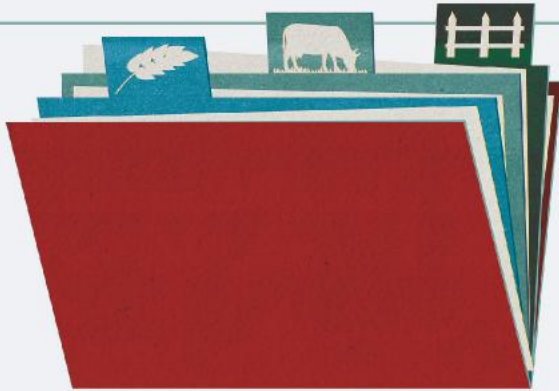
DAIRY

The average UK farmgate price stood at 30.08ppl in December. This was 2.5% and 15.7% higher than in December 2011 and 2010 respectively. Weather and feed costs have impacted on milk production, so supplies are tight, with global prices increasing or staying stable.



BEEF

UK prime cattle supplies are forecast to increase in 2013, reflecting a growth in calf registrations, but numbers will remain below the two million head mark. UK prices have increased 10% in the past 12 months. After falling in early 2012, global export prices have moved up.



FAILING TO ACT

Cross-compliance offences are showing a marked increase on previous years

Alarming, first-time cross-compliance offences are up 5%, with subsequent offences then increasing threefold. However, by taking a few simple measures farmers can avoid penalties.

It is important not only to update the Soil Protection Review by 1 January but also if any activity takes place on waterlogged land (except within 20m of a gate or access point) and if additional land is taken on.

"Nitrate Vulnerable Zone compliance also requires detailed record-keeping by field, including planting dates, fertilizer and manure application rates and date of application, along with copies of any advice given," says Andrew Wraith of Savills Agribusiness. "Records must be kept for five years."

If there is livestock on a holding, then the number, time on the farm and estimated manure production for each stock type must be properly recorded by 30 April.

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DIARY DATES

Savills attends many events across the country. Here are some of the key dates for 2013

2-6 MAY

Badminton Horse Trials,
Badminton,
Gloucestershire.
Visit: badminton-horse.co.uk

22-23 MAY

All-Energy 2013,
Aberdeen
Visit: all-energy.co.uk

FROM JUNE

Countryside Learning,
Savills Fundraising
Events
Visit: countrysidelearning.org

12-13 JUNE

Cereals,
Boothby Graffoe,
Lincolnshire
Visit: cerealsevent.co.uk

19-21 JULY

CLA Game Fair,
Ragley Hall,
Warwickshire
Visit: gamefair.co.uk

INVESTING IN THE FUTURE

A new £20 million scheme will fund vocational training for rural enterprises

The Government, via the Rural Development Programme for England (RDPE), is funding a new £20 million scheme providing work-based training for rural businesses. "We're investing in vocational training to help rural and farming enterprises increase their profits and become more competitive," says Jim Paice, Farming Minister. "This is the latest in a £165 million package of support to help unlock the economic potential of our rural areas."

The courses on offer cover topics such as business management, innovation and technical skills, horticulture and forestry, animal health and welfare, marketing and supply chain efficiency, alongside traditional rural skills and tourism. In most cases 70% of the training will be funded through the RDPE.

"Rural businesses often find it hard to access the best vocational training courses and this will help with their growth and development," says Philip Gready, Head of Savills Rural.

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How farming sectors are performing



UK sheep production is expected to increase in 2013 due to a large carryover of lambs from 2012 but balanced by a lower lambing rate in 2013. Low prices impacted on confidence within the sector, with UK prices falling 12% in the past 12 months.



UK prices have increased 12% in the past 12 months but have fallen slightly from a peak in December. However, costs of production in 2012 were much higher than in 2010 due to increased feed prices and, for average producers, are higher than finished pig prices.



Recessionary pressure ensures demand for poultry meat remains strong. Farmgate poultry and egg prices increased around 5% and 26% during 2012 respectively, but high feed prices continue to cause a squeeze in producers' profits.

THE GROWTH FACTOR

How landowners and farmers can position their businesses for growth in a rapidly changing rural economy

Agricultural land values are enjoying a period of sustained growth. They have doubled over the past five years and tripled since 2002. According to Savills research, there is more to come. Overall farm values are likely to grow by between 5-10% a year over the next five years, depending on location and quality.

The key question for farmers and landowners is how to maximise these opportunities and build a secure foundation for the future.

“Many farmers want to continue to expand their businesses to improve economies of scale,” says Alex Lawson of Savills Rural Agency. “Arguably it is a good time to borrow money for growth, as interest rates are pretty benign and banks are keen to lend to the farming sector.”

However, the balance of growth is likely to change in the coming years. “Five or six years ago, it was all about mixed residential estates,” explains Alex. “Now commercial farms are in greatest demand as residential values have suffered. But logic suggests mixed residential and sporting farms and estates have become undervalued and prices will come back up at some point. So there appears to be a strong argument to create a more diverse portfolio.”

Savills Estate Benchmarking Survey and Estates Index show that diverse assets provide

more secure income and capital growth during difficult economic times, and are therefore a good base for future growth.

“Having a mix of enterprises helps to overcome income volatility, as well as providing a hedge against capital value volatility,” says Ian Bailey of Savills Rural Research. “This diversity will continue to be important as large swings between the peaks and troughs of commodity prices become the norm and the macroeconomic situation remains bleak in the short-term.”

ASSET MANAGEMENT

Making the most of existing assets will help to diversify a business and increase profit. “A regular review can identify the most efficient use of resources,” explains Ian. “This might include restructuring farm tenancies to maximise rent levels and capital values, as well as looking into new capital projects and releasing non-essential strategic assets to reinvest elsewhere.”

Opportunities still exist to create income from the residential sector, with 45% of houses on the average estate having historic tenancies with poor rent levels. Active management of a residential portfolio can release properties to be let out at market rents.

Changes in planning legislation have also made alternative uses more feasible. “There is





now greater scope for converting disused farm buildings into residential or commercial use," explains Alex Lawson.

Along with development, there are other areas of potential growth worth exploring. Charles Dudgeon of Savills Rural Agency believes forestry is an important sector to consider.

"Timber prices are already rising and forestry carries certain tax advantages," he explains. "Any estate that is big enough should have some commercial forestry. If you don't have any nearby, consider buying out of your area."

NEW TECHNOLOGY

Investment in renewables and new technology also looks like a lucrative option. "Renewable energy can provide a profitable income stream, as well as reducing input costs and creating capital uplift," says Alex Lawson. "Most experts agree the only way forward for world farming is to embrace new technology. This is moving on apace and investing in innovation is likely to play a key part in growth."

Another interesting area for investment is water management. This year has highlighted the importance of flood protection in low-lying areas, but water storage and irrigation will become increasingly valuable in drier parts of the country. So, if there is an opportunity to invest in a reservoir and irrigation infrastructure, it is likely to pay off in the future.

FORESTRY IS AN IMPORTANT SECTOR TO CONSIDER



INVEST IN QUALITY

When it comes to investors looking to buy into the agricultural sector, there is one guiding principle: search for quality.

"The big investors are focused on top quality farmland with the best fixed equipment and infrastructure," says Alex. "The optimum farm for investors would be high quality arable land with flexible cropping across at least 1,000 acres. There should be a mix of enterprises and some decent residential property."

While country houses have fallen out of favour with investors, they will undoubtedly contribute to the future growth of mixed estates. "The marriage value for estates, whereby the whole is worth more than the sum of its parts, is likely to rebound," explains Alex. "The grand country house, which is an aspirational purchase for many high net worth individuals, should play an increasing role in that overall value as the residential market starts to recover."

Which only goes to show that, when it comes to growth, it's important to keep your eye on the bigger picture. ■

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GROWING IDEAS

STRATEGIC THINKING

A comprehensive review helped one rural estate grow its revenue and release valuable capital

Savills has managed Lincolnshire County Council's farms estate since 2000, comprising more than 19,000 acres of let agricultural land, farm buildings and 73 dwellings. In 2008, Johnny Dudgeon of Savills Rural produced a Strategy Report with a comprehensive portfolio review.

"We made recommendations for the future management of the estate that have since been implemented," says Johnny. "These included rent reviews and reinvestment, which has provided 11 new agricultural buildings to date."

As a result of the review, the estate's gross rent roll has increased by 37% from 2007/08 to the current tax year. Strategic sales have also reduced the estate size from 20,224 acres to 19,175 acres, releasing valuable capital for targeted reinvestment.

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FUTURE PROOF

THE SECRET OF SUCCESS

Clive Beer of Savills Professional Practice on why succession planning is vital to secure an estate's future

Most family rural estates are managed with a view to passing them on to the next generation. But too often landowners fail to produce a transparent succession plan, leading to unnecessary tax bills and family disputes.

Succession planning requires a frank dialogue. If this is not possible within the family, it is a good idea to bring in a mediator and tax specialist to help it happen. It's essential for everyone to express their hopes and fears, as there are usually legal solutions available to overcome them.

Trusts can be a tax-efficient way to pass on an estate, while protecting it from any family breakdowns. Pre- or post-nuptial agreements may also be an option, if divorce is a concern. It is vital to plan early and clearly to ensure the estate is passed on in the best condition possible.

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WEATHERING THE STORM

Five ways farmers can reduce the impact of extreme weather

The jury may be out on the causes of global warming, but more volatile temperatures appear to have had an impact on weather patterns. According to the Met Office, 2012 was the wettest year on record for England.

“The trend towards more extreme rainfall events is one we are seeing around the world, in countries such as India and China, and now potentially here in the UK,” says Professor Julia Slingo, chief scientist at the Met Office. “Much more research is needed for a greater understanding of the potential implications.”

Clearly farmers need to take stock of extreme weather patterns, from drought to flooding, and plan to combat their worst effects. Robert Hall and Ashley Lilley of Savills Agribusiness highlight five key areas to focus on.

1 DRAINAGE

In recent years heavy rain has affected most farms. For example, some arable farmers have been unable to get on to their land to cultivate or harvest at the right time, resulting in wastage of crops.

“We have seen a big difference between those who have invested in drainage or maintained it and those who have let it go,” says Robert Hall. “People have got away with things over the past 10-20 years, such as not clearing ditches and jetting, or just

ignoring what hasn't been a major problem. They were really hit last year.”

The answer is not necessarily to drain every acre, which requires serious investment, but simply to carry out basic maintenance, jetting and repairs, alongside renewing drains in the real problem areas.

2 SOIL STRUCTURE

Soil structure and maintaining the organic matter in soils is essential, especially when it comes to ensuring that drought-prone soils retain moisture.

“Incorporating organic matter will help soil structure and the retention of water in a drought period,” says Robert. “We are looking at getting organic matter back in to some soil types using cattle, pig or chicken manure.”

3 CROP OPTIONS

Some farms were unable to sow last autumn, which left farmers looking at the available options for spring wheat or barley. Unfortunately, the later crops are sown the lower the yield. “Spring beans might be an option if you can get seed, but if the market is flooded, which it could easily be, the price might not be very exciting,” says Robert. “I see spring beans as something of a Cinderella crop – they don't always deliver. They can look good and not yield, or look terrible and yield well. Until you get the

combine in you don't know what you've got, so selling forward at what seems a good price may be misleading.”

4 STOCKING DENSITY

Farmers could also consider lower stock numbers. Where farms are overstocked, utilising environmental schemes might help to retain income levels. This may be particularly relevant in upland areas. “There is a combination of factors that will determine stocking density, including soil type and the availability of winter housing,” says Ashley Lilley.

5 FORWARD PLANNING

Working through the “what if...” scenario – looking at the likely impact of extreme weather on stock and fodder planning – can be critical. “If forage stocks are running low and you have no cash to buy, do you sell some animals?” says Ashley. “Can you reprioritise fodder, for example feed productive animals on dairy farms by looking after cows in-milk and then those close to calving? Those further off calving might have to go on shorter rations.” ■

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“FARMERS NEED TO TAKE STOCK OF EXTREME WEATHER PATTERNS”



SMALL PRODUCERS BIG IDEAS

Exporting premium products can generate valuable income. But what are the best ways for small producers to access global markets?

W

ith the UK economy still stuttering, looking abroad is a logical step for businesses with quality, niche products. But how feasible is it for a small, farm-based producer to tackle the global market?

“All the things that apply to building a business in the UK are relevant for export,” says Ashley Lilley of Savills Agribusiness. “You need to have a sound business plan, monitor finances, understand your target market and be aware of the legal pitfalls.”

To help businesses access global markets, Defra and UK Trade and Investment (UKTI) launched its Action Plan last year – the first of its kind. But there are already plenty of producers profiting from selling abroad. Take, for example, Tom and Gill Mellor of Wold Top Brewery. This multi-award winning microbrewery, based on a farm near Driffild, East Yorkshire, sells beer to Italy, Sweden, Norway, Finland and Canada.

“UKTI gave us lots of guidance and I have no hesitation in recommending them,” says Gill. “We’ve been on selling trips with them to develop contacts, and they gave us advice on market requirements. For example, they told us the average US consumer gives each label 1.5 seconds’ attention. You’ve got to sell your product in just nine words!”

Wold Top’s customers all work on contracts that require them to arrange collection of the beer, on an ex-duty and ex-VAT basis, making the paperwork and logistics easier.

FOCUSING ON THE PRODUCT

Some small businesses use a specialist exporter, so owners have more time for product development and production. It’s a route that Lyburn Farmhouse Cheesemakers took. This Hampshire business is run by the Smales family, who have been producing cheese for four generations. “We are a specialist business, with a top-end product,” says Mike Smales.

Maintaining the award-winning quality of their cheeses is the company’s primary focus.

So, when specialist exporter The Fine Cheese Company approached Mike about handling the paperwork and shipping, he saw the potential.

“I didn’t want to have to deal with the financial side and endless paperwork,” he explains. “There’s a lot of red tape involved in exporting to the US. Getting enough for a container load is also difficult, plus you need to be on the ball about getting paid. Working with The Fine Cheese Company means I can focus on the product.”

BROADENING YOUR MARKET

Not all businesses take the long-term approach. Lorraine Whinn launched her chocolate company in 2011 and will start exporting this year. She hopes that 25-30% of the output of Rural Foodies, based in Bwlch y Ffridd, Powys, will eventually go overseas. “I wanted a business I could run from my farm and export was always my strategy,” says Lorraine.

She uses a UK-based consolidator, but says there is still plenty of legwork for business owners. She approached the UK Food and Drink Export Association and was eligible for four days of consultancy with director Elsa Fairbanks.

“We met up to discuss my products and Elsa produced a tailored report,” says Lorraine. “I then got funding and started building contacts.”

Elsa herself is positive about the prospects for rural businesses looking to widen their market. “We’ve had a lot of interest in the wake of the Action Plan,” she says. “UKTI’s Passport to Export is the starting point – it helps with strategy and identifying the best markets.”

Elsa points out that some markets are easier than others. “China has big opportunities, but it’s not for beginners,” she explains. “But the same rules apply whatever the market: you need a good product that is well presented and has been tailored for the customer.” ■

EXPERT TIPS

NEW HORIZONS

Ashley Lilley of Savills Agribusiness advises on expanding overseas

Networking is very important. The right name can open all kinds of doors to new overseas markets.

Be prepared. Different markets have different requirements. Registration and labelling requirements in the US, for example, can take up to six months.

Use experts. Employing a specialist export firm is often the best route for a small business as it can save time and reduce financial headaches.

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Pictures on this page: The award-winning Wold Top Brewery and Lyburn Farmhouse Cheesemakers



PLANNING FOR SUCCESS

Securing planning permission is often a challenge. But there are steps landowners can take to get a positive result



Planning Minister Nick Boles attracted headlines by claiming that building on non-Green Belt open land would “solve the UK’s housing problem”. But he made another, less well-publicised suggestion that is just as important. The minister indicated that planning restrictions ought to be relaxed so that estates and farms can diversify and secure their futures.

“The climate is slowly becoming more pro-development and this is creating real opportunities for landowners,” says Roger Hepher of Savills Planning.

But even with a more positive approach, securing planning permission can still be a struggle. We look at three popular schemes for rural development and reveal how landowners can win over the planners.

SUSTAINABLE ENERGY

This is the area where a pro-development agenda is most apparent. The National Planning Policy Framework (NPPF), which is just a year old, states that some on-site “farms” of solar photovoltaic panels, along with biomass, anaerobic digester and hydro projects, may be regarded as permitted development by some local planning authorities. In these cases they will not require planning permission. Where planning is required, sites that generate the least traffic and are located by existing roads are most likely to be backed by planners.

COMMERCIAL USE

Converting outbuildings to commercial use is often supported in principle by planners, as long as it provides new jobs. But any proposal needs to overcome some key planning hurdles.

“Consent is more likely if the buildings are not listed,” explains Roger. “Choosing redundant sheds or barns at the edge of a farm or estate, which require minimal disruption to nearby fields and views, will also help to get the planners on side.”

Rooflights, uPVC windows and dormer windows will be frowned on in most period farm buildings, even if they were derelict immediately prior to conversion.

If you’re proposing a brand-new farm building, a robust application will need to demonstrate the building has a safe access route and is appropriately located in the landscape. Before putting together an application,

PLANNING HAS A CENTRAL ROLE TO PLAY IN THE GROWTH OF THE RURAL ECONOMY

landowners should explain their proposals to the local community and stakeholders, so the facts are clear from the outset. They should also outline any local benefits, such as employment or contractor work.

The Government’s planning policy aims to encourage diversification. Its Planning Policy Statement 7 states “diversification into non-agricultural activities is vital to the continuing viability of many farm enterprises” and local authorities should support “well conceived” plans for diversification.

The type of diversification that landowners choose can be important to the outcome of an

application. The local parish or community plan, in which local communities set out their priorities for social and business development, can reveal which planning permissions are more likely to be successful.

RESIDENTIAL CONVERSION

When it comes to residential development, affordable housing is a key way to win over the planners. “The NPPF explicitly states that residential development may be acceptable if it includes or encourages affordable housing,” says Roger.

Any planning go-ahead will be qualified by maximum sizes and possible restrictions over the type of homes, so business models must be flexible. Sites that are in, or on the edge of, sustainable settlements will also be considered more favourably.

Although securing residential planning permission can be a considerable challenge, the results are definitely worthwhile.

“Residential planning consent will have a very positive impact on the subsequent demand for the land and its value,” says Tim Gent of Savills Planning. “But it’s important to realise that the benefits of a positive planning process are not just confined to housing. Good planning adds value at every level and has a central role to play in the recovery and growth of the whole rural economy.” ■

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A DIFFERENT SET OF RULES

Alastair Wood of Savills Planning looks at the challenges and opportunities north of the border

Scotland’s rural planning shares some similarities with the rest of the UK, including an overarching framework, but there are significant differences.

1 Scottish planning is more positive towards renewable power than the rest of the UK, with a much higher proportion of applications for wind turbines securing consent.

2 There is less of a presumption to allow residential development. In fact, new development plans in Scotland need to find much more land for this purpose.

3 Developments are often subject to very vocal lobbyists. This makes decision-making even more of a politically sensitive exercise than south of the border.

FARMING TODAY

The numbers behind Britain's thriving rural economy



3,845 ACRES

The size of Savills largest private single land sale in 2012

1,009 ACRES

The largest public arable farm sale in 2012

12%

The rise in food prices in real terms over the past five years

90,000 km

The total length of stone walls in England and Wales

515,000 km

The total length of hedgerows in England and Wales

£7,000

The average value of prime arable land per acre in Wales in 2012

£7,500

The average value of prime arable land per acre in Scotland in 2012

£7,609

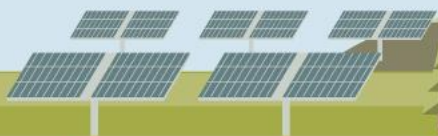
The average value of prime arable land per acre in England in 2012

14%

Contribution to national employment by the agri-food sector in Q1 2012

125,000

The number of panels in one of Britain's largest solar power plants, due to be completed this year in Leicestershire



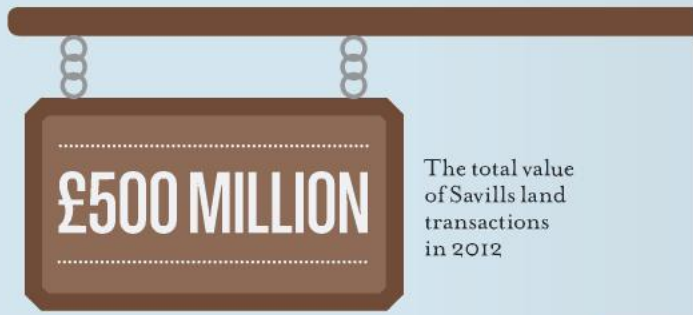
195,000 FARMS



51,000 FARMS



37,000 FARMS



£500 MILLION

The total value of Savills land transactions in 2012



74%

The percentage of UK land that is farmed

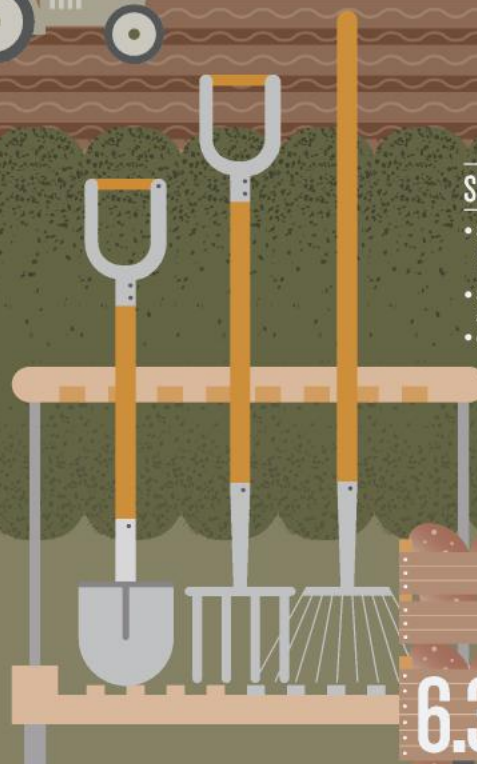
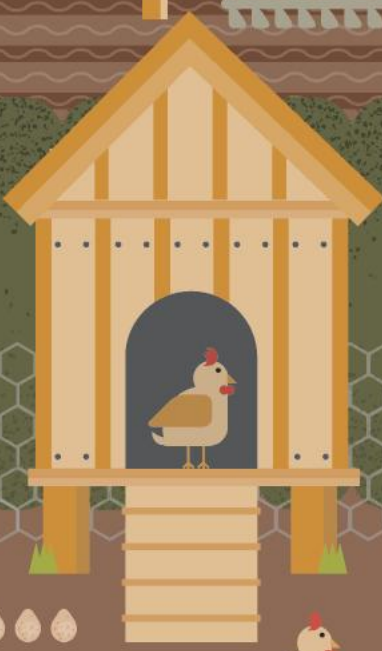


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- ukagriculture.com

1.4 MILLION

The number of eggs produced daily by the UK's largest free range egg farm, Glenrath Farms in Scotland



6.3 MILLION

The tonnes of potatoes produced each year by UK farms





YEAR OF THE ENERGY FARMER

Green energy is set to play a key role in the rural economy in 2013. We reveal how to maximise returns from renewable schemes

First there was drought, then there was rain. And more rain. For farmers, 2012 was a difficult year. The incomes they'd expected to see from crops didn't materialise. But rather than leaving themselves entirely at the mercy of the elements, this year many landowners are looking to harness those elements with renewable energy schemes that provide a guaranteed income.

The Government has a target of producing 15% of the UK's energy from renewable sources by 2020. As a result, it wants to encourage renewable energy production and subsidises every kilowatt hour (kWh) of energy that is produced sustainably. The amount of the subsidy depends on the type of energy source and the size of the scheme, but the figure that a participant signs up to is guaranteed for the next 20 years.

The biggest area of growth has been ground-mounted photovoltaic (PV) schemes. "The UK will probably have an installed base of 1GW energy produced this way by the end of 2013, compared to none two years ago," says Mark Williamson of Savills Energy.

This growth is largely due to the drop in the cost of panels, which have come down from around £4,000 per kW panel two years ago to about £1,100 now.

The technology relies on light rather than sunshine, so even in a particularly rainy year, such as 2012, the panels still operate well. In

Britain, they will give their best returns in the south-west region, where the days are longest.

"They do raise the debate of using land for energy rather than food," says Mark. "But generally they are being put on less productive land, such as brownfield sites or a farmer's worst performing field. Planning permission isn't a great problem – around 85% of applications get approved, if sites are selected properly, compared to 50% of wind projects."

With large-scale projects, it is very unlikely that a landowner will be financing the scheme. The more typical route is to work with a third party that has the expertise and finance. The landowner then receives a percentage of the revenue as income for leasing the land.

"Wind projects can cost hundreds of thousands of pounds just to get through the planning stage, so a third party is almost essential," explains Mark. "However, if you do have very deep pockets, it's like any investment: the more you risk the more you stand to gain."

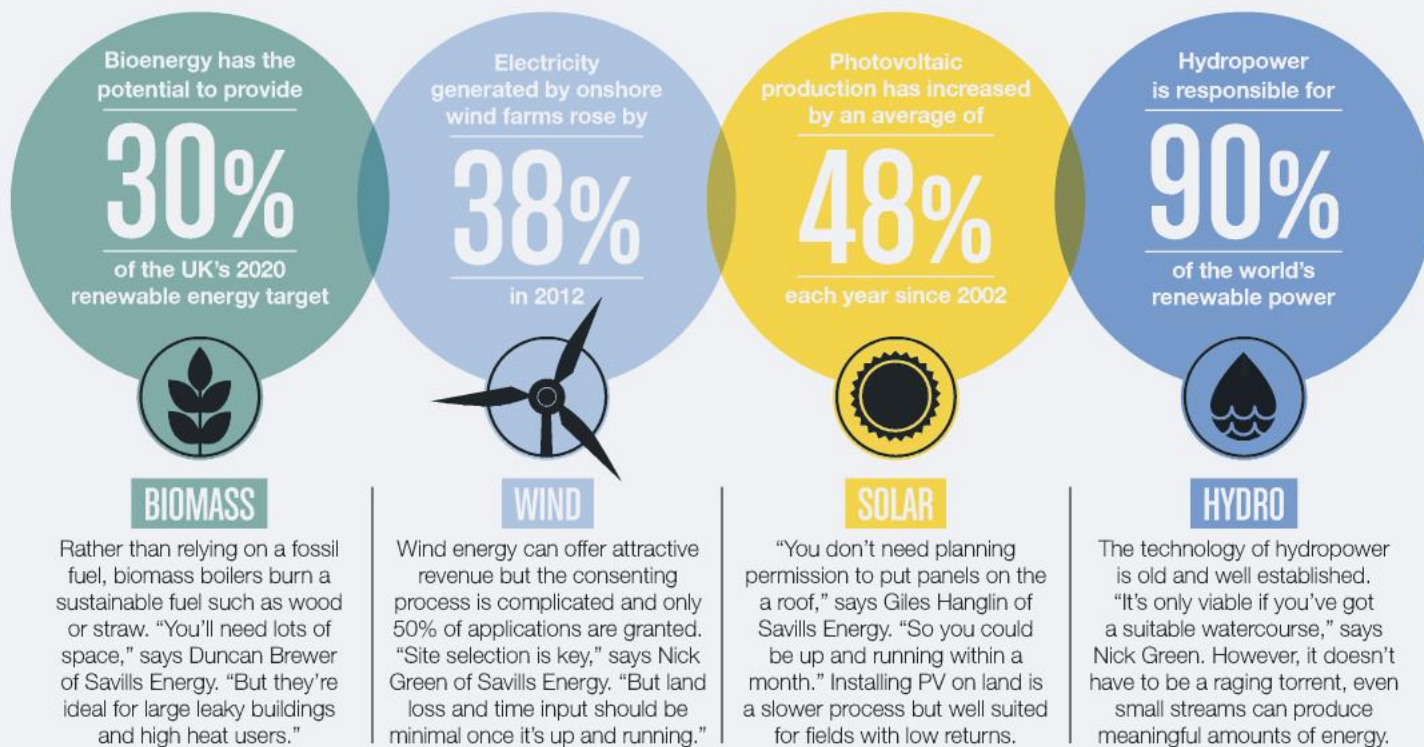
For smaller projects there are big benefits to be gained from financing a scheme yourself – not least the increased capital allowance. Since January this year and until December 2014, you can offset up to £250,000 of capital investment against tax on your trading income.

"These small-scale schemes don't just offer a good revenue stream, they can also provide

THE BIGGEST AREA OF GROWTH IS GROUND-MOUNTED PV SCHEMES

WHAT'S THE ALTERNATIVE?

It's important to choose the right scheme for your business



very attractive savings on the day-to-day running costs of a farm," says Mark.

Even if farmers can't afford the full cost of installation, there are other options for financing, such as working with a leasing company or agreeing a deal where a company owns the asset but shares the benefit.

It's not just sustainable energy that the Government subsidises – renewable heat sources are also covered. Farms that use a lot of heat, for example in keeping chickens warm, or for glasshouses, could reap the benefits of installing a biomass boiler that burns woodchips or straw rather than a traditional fossil fuel.

"They'd receive the government subsidy for every kilowatt hour of thermal energy they use, plus they would reduce their heating bills," explains Duncan Brewer of Savills Energy. "Oil costs about 6-7p per kW therm compared to 2-3p for the equivalent in woodchip, and that's if they have to buy it in. Some farms might be able to produce their own from managing woodland."

Other farmers who require cooling rather than heating might look at putting PV on the roofs of buildings to power air-conditioning systems. "A PV scheme could cost between £55,000 to £65,000 to install, subject to building and roof type, and will give farmers a return of 12-18% a year, depending on where they live," says Giles Hanglin of Savills Energy.

THE GREEN DIVIDEND

Ecosystem services may soon generate income

Following 2011's Natural Environment White Paper, ecosystem services may finally be translated into income. The Government has six pilot projects around the country looking at biodiversity offsetting schemes. Developers buy the "conservation credits" of a landowner's land and the landowner receives income for managing the land. "The Government estimates credits could be worth £50-300 million a year from new housing alone," says Charlie Russ of Savills Professional Practice. The Natural Capital Committee is due to deliver its report on the State of the Natural Capital this year. Once it's in the Government's hands, it could inspire new initiatives that put economic value on the environment.

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To maximise the return on any such scheme, farmers need to use as much of the electricity they produce as they can.

"Sometimes this can mean looking at doing things a bit differently," explains Giles. "For example, they might have been used to operating potato chillers at night, but as PV produces most electricity in the middle of the day, they should switch to operating them then instead. Any excess electricity that they produce can be sold back to the grid."

Schemes can also bring other bonuses. A renewable energy source moves a building's Energy

Performance Certificate rating from a D or E to an A or B, which will be important in 2018 when the requirements change and regulations tighten. Plus it does producers no harm with big supermarkets to be able to show some green credentials in their production processes.

So if 2012 was the year when drought or rain ruined your finances, it could be wise to make 2013 the year when whatever the weather throws at you, you'll turn it into a profit. ■

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CUTTING EDGE

With the National Centre for Precision Farming opening this year, we look at how new technology could transform British agriculture



Professor Simon Blackmore, head of agricultural engineering at Harper Adams University College, often divides his audience when he speaks at precision farming events. “There are two types of reaction – those farmers who want all the technology now and those who hope they’ll have retired before it comes along,” he says.

Professor Blackmore’s vision of mid-21st century farming is revolutionary. “We’ll still have big tractors to carry logistics and crops,” he explains. “But in niches there will be table-sized robots doing different jobs. Today a farm manager decides to weed a field and sends an operator out to spray it, in future he’ll dispatch robots to check for weeds or pest outbreaks.”

It sounds like a brave new world, but the professor points out this technology takes us back to the origins of farming. “We have moved away from intimately understanding soil to more industrial processes,” he says. “With a horse and plough, farmers once worked without shoes so they could know the soil through their feet. Precision farming can recreate that connection.”

Digital mapping is key to understanding the land. “Technology is having a big impact on day-to-day farming,” says Debbie Bolton of Savills Mapping. “Digital mapping affords easy access to many layers of information, including legal ownership boundaries, land parcel areas, aerial photography, land use, soil data and yield.”

Digital mapping really comes into its own when it’s combined with GPS. “A tractor with GPS can recognise its position in the field, so it can almost drive itself with minimal overlap, leaving the operator to concentrate on optimising performance,” says Andrew Wraith of Savills Agribusiness.

For Christine Tacon, former managing director of the Co-op’s farming business, the sooner British farmers adopt this new technology the better. “We can’t carry on doing the same things,” she says. “Inspiration and investment in agricultural engineering are what’s required.”

According to Professor Blackmore, engineering innovation will deliver better crops, save money and benefit the environment. “On the one side, farmers face a wide range of new pressures – environmental, economic and regulatory,” he says. “On the other, we have new technologies, like Wi-Fi and robots, developed outside agriculture. I’m trying to bring the two sides together to help meet those pressures.” The professor also believes in doing things smaller and smarter. “If we want world-leading agriculture in this country we have to invest in the engineering to support it,” he says. “By moving ahead, we can make UK agriculture more efficient.”

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**MODERN TECHNOLOGY
IS HAVING A BIG IMPACT ON
DAY-TO-DAY FARMING**





THE AGRIBUSINESS PROFESSIONAL

Andrew Wraith of Savills Agribusiness

Most of the farmers I've spoken to see GM as being a pivotal part of the future. They want to have it available to them. There's a general feeling in the industry that we're finally heading in a good direction, thanks to a wider realisation that food production is important. The question is how to meet these needs sustainably, year in and year out. GM isn't a silver bullet, but if we can't use it, it will be a limiting factor for our industry.



THE ENVIRONMENTAL ACTIVIST

Mark Lynas, journalist

Although I previously campaigned against GM crops, I now think if they are rejected we have one less tool to improve the environmental performance of agriculture and deliver food security. Vitamin A-enhanced "golden rice", for example, is close to release. It will help prevent blindness and death in hundreds of thousands of children per year. The blanket opposition to GM crops has much in common with the rejection and fear of vaccines, and just as little justification.



BLANKET OPPOSITION TO GM CROPS HAS LITTLE JUSTIFICATION



TALKING



THE ORGANIC ADVOCATE

Emma Hockridge of the Soil Association

We oppose moves to spend more on GM research in the hope that it will help feed the world. GM scientists and the industry have consistently over-promised and under-delivered, and there is no sign that will change. Countless tried, tested and successful ways of tackling hunger and food insecurity are underused for lack of investment, so it is madness to throw good money after bad on GM and to open the floodgates to a torrent of risky and unneeded GM crops.

IT'S MADNESS TO OPEN THE FLOODGATES TO A TORRENT OF RISKY GM CROPS



WE ARE PARTICULARLY CONCERNED ABOUT CROSS CONTAMINATION

ASK THE EXPERTS



THE ORGANIC FARMER

Tom Rigby of Johnson's Farm

GM is something that needs looking at very carefully.

One of the commercial crops widely available has pesticide bred into it. Using conventional pesticides is bad enough, but at least you can wash them off. When it is bred into the plant it's more problematic. We are particularly concerned about cross contamination and are wary of anything that impacts our right to keep our land GM-free.



THE SCIENTIST

Professor John Pickett of Rothamsted Research

GM is a technology, rather than a product, and the

polarised "pro" or "anti" debate may be better rationalised if we discussed each product of GM technology using peer-reviewed science and risk-benefit analysis. We are running an experiment to get wheat to produce a natural pheromone that warns off aphids. I hope our research provides new knowledge, free from bias and open to everyone, to allow society to make choices about future food supply based on facts rather than speculation.

This picture: Some GM crops could reduce the need for spraying. Left: Harvesting potatoes on an organic farm. Below left: Anti-GM protestors.

POINT

Industry experts from all sides of the debate give their opinion on the future role of GM crops



THE FARM MANAGER

Richard Cross of the Oxtou Farms Trust

I'm pretty much in favour of GM. I have to do an awful lot of spraying of chemical insecticides, which are really quite toxic. We go through our crops about seven times a year. Anything that will save me having to use so many chemicals will be better for the land. The chemical bill is also a big hole in every farmer's budget. I went to a 7,000 hectare GM maize farm in the US where the owner doesn't even own a crop sprayer! He gets a contractor to go through once a year.



THE BIO-TECH ADVOCATE

Nick von Westenholz of the Crop Protection Association

GM must form part of our response to the challenge of producing more food. The real concern is whether Europe wants to be at the forefront of meeting this challenge or to be left behind. Right now, the latter appears more likely. This not only poses questions as to the economic ambition of the Continent, but also whether it's right to place the onus on non-European economies, particularly in the developing world, to feed the globe, instead of on ourselves.

FOOD FOR THOUGHT

Consumers are becoming less concerned about buying GM food

Only 2% of people look for information about GM when buying food, according to a study by the Food Standards Agency (FSA). It revealed awareness of current labelling requirements was low, with a slight preference for labels indicating the presence of GM rather than its absence.

It also found consumers were unaware that farmers used genetically modified animal feed. When alerted to its use they felt that products should be labelled as GM if they came from animals reared using GM animal feed.

Public worry about genetically modified foods has actually been falling, according to research in 2012 by the British Science Association. The number of people who say they are "concerned" about GM has dropped by 5% since 2003.

Words: Peter Buhmann. Pictures: The Soil Association; Getty Images; Shutterstock



BRIDGING THE GAP

There has never been a better time to move property equity from London to the countryside. So will 2013 see a revival of the rural market?

The gap between house prices in London and the country has never been wider. It is now possible to buy an elegant country house near Oxford for the price of a terraced home in Fulham.

The imbalance is a result of the phenomenal growth in prime central London prices, which have risen by 22% since 2007. This has partly been fuelled by huge sums of international money. Overseas investors have responded to global financial turbulence by taking refuge in London's comparative stability. Around £19.5 billion was spent in this way between 2007 and the end of last year.

Prices in key neighbourhoods away from London's high-value core have also risen, as affluent young families have made areas such as Fulham, Wandsworth and Clapham highly

prized. "We predict this market will pause for breath in 2013," explains Yolande Barnes of Savills Research. "But it will then rise by 3.5% in 2014 and by more than 22% by 2017."

So the big question is whether London homeowners, sensing the timing is right, will move this year and take their wealth with them.

"We are finding that around 25% of clients want to make the move to the country," says Lindsay Cuthill of Savills London Agency. "They are looking in areas such as Hampshire, Sussex, Cambridge and Oxford. From sales in


our south-west London offices, we might see £375 million moved into the country market, which could impact hugely on rural sales."

Property wealth is already flowing through established commuter corridors, lifting prices in towns such as Sevenoaks, Guildford and Beaconsfield. Savills forecasts a rise of 21% for the prime inner commuter zone in the next five years, with the outer zone rising by 19%.

But it seems high-earners are no longer looking for the ultimate country pile. Instead, they want a two-for-one solution. They are buying at under £2 million in the country, avoiding stamp duty of 7% on £2 million-plus property, and also purchasing a flat in London.

Oxfordshire is a favourite with families looking for good schools and an easy commute. "There has been a steady stream of London buyers registering since January," says Richard

AROUND 25% OF CLIENTS WANT TO MOVE TO THE COUNTRY



The picturesque Holywell Estate, which is located on the Lincolnshire/Rutland border

A QUESTION OF VALUE

Philip Eddell of Savills Country House Consultancy reveals how to protect the value of a country house

1 Know the value of the whole estate

When it comes to the main house, land and associated buildings, the whole will often be worth more than the constituent parts. This is known as the marriage value. A quick sale of some elements to raise cash can have serious consequences for the value of the remaining assets. An example might be where a cottage or land close to the principal house is sold off, but the resulting loss of value of the main property is disproportionate to the amount raised by the sale.

2 Carry out essential repairs

Spending money on kitchens and bathrooms might be pointless if the house has serious defects that have got out of control, such as a bad roof, dry rot or some other fundamental problem that will be expensive to repair. Routine maintenance will usually stop small problems becoming big problems.

3 Protect privacy

Buyers of large country houses value privacy and security. Anything that impacts on this will inevitably impact on value. Make sure no tenancies are created that can't be terminated and do not allow for any public rights of way to be established close to areas that need to be kept private.

Philip Eddell,
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Binning of Savills Rural Agency. "Applicants are up by over 1,000. The next few months will tell us if they are just dipping their toes or are really committed."

Houses with land, like farms and estates, have held their value reasonably well because the leap in land values has buffered them from the downturn. Some rollover relief on Capital Gains Tax from the sale of companies has also been invested in property and land.

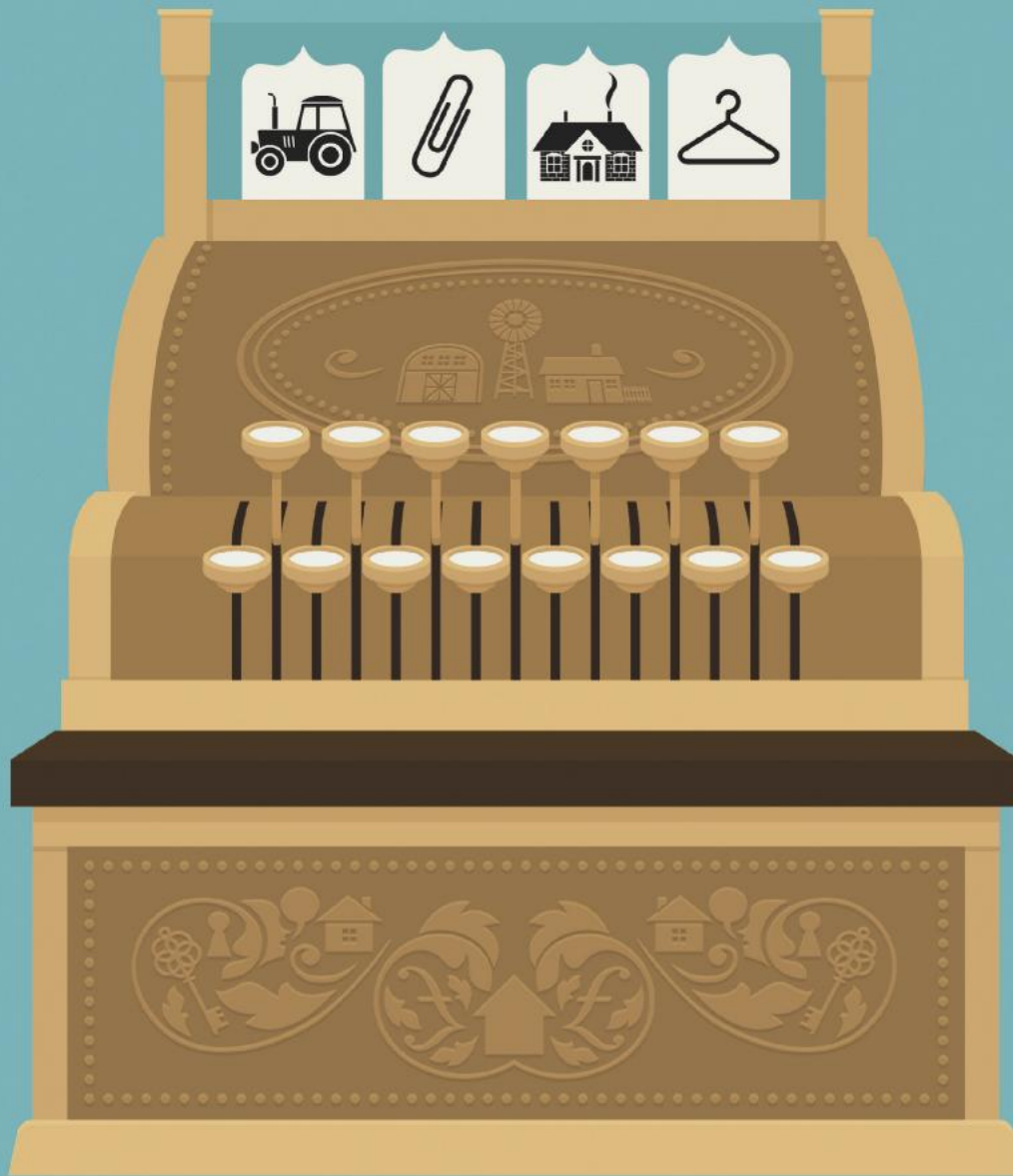
The new buyers of 2013 increasingly want houses with the same level of digital connection as city homes. "The first questions people ask are about the mobile phone signal and internet connection," says Richard. "Buyers with London offices are often looking to work at least one day a week from home."

Phillippa Dalby-Welsh of Savills Country Agency believes the rural market is set to

attract more overseas buyers. "Last year international interest went up from 19% to 27%," she says.

The good news for sellers is that houses which hung on the market are now starting to attract offers. "In the south-east the number of sales is up threefold on the same period last year," says Phillippa. "Money sitting in the bank is not earning and buyers know that if they invest now in a country property they may well benefit from capital growth in the next five years." ■

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A FUND OF IDEAS

Wealthy investors are creating mixed property portfolios, ranging from land to retail. We ask what's driving the trend and reveal where the smart money is being spent

Land and has traditionally been a core investment. But private and corporate investors are now expanding their interest to include a range of property assets, including retail, offices and residential. “A UK property portfolio gives investors a broad exposure to this market and has provided an attractive yield relative to cash,” says Jeremy Lovell of Savills UK Investment. “It has become a key strategy for domestic and overseas funds, as well as high net worth individuals.”

Figures from the Investment Property Databank show that property produced an average income return of more than 6% in the past 10 years, compared with 3.5% for bonds and 2% for equities. Private investors have re-entered the commercial property market with some enthusiasm. While they make up only 5% of the value of investment, their numbers have doubled since 2003. Retail is particularly popular.

“Private investors find retail very easy to understand and to manage,” says Jeremy. “The responsibility for repair and shop-fit lies with the tenant, unlike an office let where you will have to inject further capital into the building after a tenant vacates before re-letting it.”

HOMING IN ON PROFIT

When it comes to residential property, London has dominated the headlines. “Over the past three or four years, purchasers have regarded property in the capital as an asset class and the returns have been extremely favourable,” says Justin Marking of Savills UK Residential. “There is a distinct correlation between the value of prime residential property in central London and the price of gold. A lot of buyers have regarded investment in prime London locations as a safe bet. And they’ve been proven right.”

Justin believes investors should also look outside London, with hotspots like Bath, Cambridge and Oxford promising to replicate the performance of the capital. Currently, rural areas are less strong, although they offer good opportunities. “The differential in values between London and the country is as big as it’s ever been, says Justin. “To get within 5% of the bottom of a market you need to be lucky or very shrewd. Those buying country property this year could look the latter in years to come.”

INVESTING IN OFFICE LIFE

It’s not only residential property that is offering investors an opportunity. The disparity in value between London and the rest of the country also

applies to offices. This sector has delivered a strong performance and attracts equal levels of investment from UK and overseas funds.

“Some subsectors and submarkets in prime central London are looking quite pricey for investors and so the regions are beginning to whet appetites once again,” says Stephen Down of Savills Central London Investment. “The gap between yields in prime London properties and elsewhere is so wide that the regions are looking compelling. Manchester, Birmingham, Leeds, Bristol and Glasgow have all recently been on the buy lists for investors.”

As for the future, the UK is leading the way in property investment, but the rest of the world will follow. “We’re starting to see the globalisation of the property market,” says Peter Hobbs of the Investment Property Databank. “While high net worth individuals, for example, will have an equity portfolio with global exposure, it hasn’t been the same for their property portfolio. But that is changing. It’s like it was 20 years ago when equities were focused on the UK, before the market became global. Property is following the same path.” ■

INSIGHT

HIGHLAND FLING

Top quality arable farmland is performing well in Scotland

Average prime arable land values in Scotland increased 10% during 2012 – comparable growth to similar land in eastern England. “We’ve had competitive bidding situations in the majority of sales,” says Charles Dudgeon of Savills Rural Agency. “Over the past two years, premiums have been around 24% over the asking price.” Farmers have been the most frequent buyers, motivated by an appetite to expand their existing properties. But non-farming investors are also active, due to the strong performance of farmland compared to other assets.

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Words: Peter Buhmann. Illustrations: Zara Picklen



LAND

“Investors are only looking at bare land and aren’t interested in buildings. This may be a mistake. Investors should look at appealing to both the commercial farming market and the family occupier, who is always going to want a house and a set of buildings.”

Charles Dudgeon, Savills Rural Agency, 0131 247 3702
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OFFICES

“With an election in 2015, I think there will be an element of caution. But this will be balanced by pockets of very solid performance, especially around London’s fringes where infrastructure improvements add value.”

Stephen Down, Savills Central London Investment
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RESIDENTIAL

“A number of buyers are recognising the fact that country houses represent real value at the moment, making this a good time to buy. Our view is that country values will rise towards 20% in the next five years.”

Justin Marking, Savills UK Residential
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RETAIL

“Rents are rebasing to new low levels, providing an excellent platform for rental growth going forward. Investors should be selective, but the opportunity at this point in the cycle is arguably the best for 20 years.”

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THE RIGHT DECISION

Disputes over rights of way can be complex and expensive. So how can landowners minimise the risk of a challenge?

Contesting a right of way can be a very time-consuming and costly process. John Wootton of Savills Rural recalls the highly complex case of an estate that had been requisitioned during the war as an airfield. It still had the runways and tracks in place when acquired by the client in the 1980s and these were used by the public with the owner's consent.

In the mid-1990s a proposed housing development encountered opposition. "Eighty-seven local residents tried to have 10km of permissive paths, which remained under the control of the landowner, designated as public footpaths, bridleways and byways, by submitting 276 user evidence forms," says John. "This opened up the prospect of rights for walkers, horse riders and even vehicles under the term Definitive Routes through Deemed Dedication for routes used for over 20 years without the landowner objecting."

After nearly 15 years, a lot of evidence and a great deal of money spent on the best legal advice, the case was finally resolved in the estate's favour in 2012. There was evidence that the routes had been used over the 20-year period, however with the permission of the owner and not "as of right". A footpaths guide was produced that referred to the routes being permissive. Evidence that there had been gates across the access points during the 20-year term was deemed to demonstrate an intention to allow use by consent and not by dedication.

To minimise the risk of a challenge and reduce the impact of existing public access, it is critical to have good evidence in place. John advises clients not to be put off by the weight of evidence that may be against them and to take the following steps:

1 Clear signage and fencing

New rights of way can come into existence through public use, but this does not happen if landowners make it clear that the public has no right to cross their land. Well-maintained fencing and clear signage that challenge unauthorised public access are key.

2 Approach trespassers

If walkers are crossing land where there is no public access, landowners are entitled to challenge them and point out they have no right to walk there. Keep a record of the location, time and date. In the future, if someone makes a claim, evidence can then be presented to show that their right to access was challenged.

3 Consider dedicating a public right of way

If there is a dispute, a great deal of difficulty may potentially be avoided if owners agree to dedicated rights of way, as this can be done on their terms and subject to restrictions. For example, owners can insist that there will be gates in place and that from time to time these will be closed, or the owner may want to place a stile or kissing gate within a fenceline. However, where rights of way are added to the Definitive Map through Deemed Dedication it is unlikely that any such gates will be permitted.

4 Lodge a Section 31 Declaration

Produce a Public Rights of Way Section 31 Declaration and lodge the documents with the relevant authority (usually the county council). These should include a map to the correct scale, with the owner's landholding marked out, highlighting the acknowledged rights of way, together with a statement confirming the ways which the owner admits to having dedicated as highways. The statement then needs to be followed by a Statutory Declaration to the effect that no other additional ways over the land have been dedicated as a highway since the date of the deposit. Such a declaration needs to be made within 10 years of the original deposit and every 10 years thereafter. Once a declaration has been deposited any subsequent public use of the land will not count towards the establishment of a new public right of way. Unfortunately, there is no time limit on claims. If evidence comes to light that shows a public right of way has come into existence at some time before the declaration, then an application to have it recorded can still be made. However, the claimants will need to prove there has been unchallenged public use over a period of 20 years prior to the date of the first deposit. ■

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A QUESTION OF ACCESS



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MEET THE RURAL TEAM

Our success is based on identifying with the lives and objectives of our clients and helping them to achieve their goals



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