

Background

This report aims to present:

- An overview of current production of primary agricultural products versus production 17 years ago (1990) in Berkshire, Buckinghamshire, including Milton Keynes and Oxfordshire (BBO).
- An overview of to what extent local farmers in BBO are looking to the future and if they have any specific ideas, as well as what support they need.

The scope of the study is to make BBO Food Groups more aware of the primary crops produced in the areas of Berkshire, Buckinghamshire, including Milton Keynes and Oxfordshire. This should also help in the recruitment of new members, linking primary producers to processors, and linking in with Public Sector and London wholesale markets projects.

The report consists of two parts:

1. An overview of current trends in the BBO production of primary products versus production 17 years ago (1990)
2. An overview of the extent to which farmers are looking to the future and if they have any specific ideas, as well as what support they need.

The first part was researched on the basis of the Defra June Census data http://www.defra.gov.uk/esg/work.htm/publications/cs/farmstats_web/datamap_links/search_menu.htm, and various local recent surveys on farming.

The second part was researched through a Questionnaire, developed specifically for this survey and carried out throughout BBO current members and non-members. Please find the sample **Questionnaire in Appendix 1.**

Summary:

The analysis of the primary produce trends was carried out for ten farm classifications, determined by Defra: cereals, general cropping, horticulture, pigs & poultry, dairy, mixed farming. Definitions of each of these classifications follow in the main report.

As a unit of measurement, the number of active farms in each county was used (potential members for Food Groups). It should be noted, that while most classifications showed a downward trend in numbers of active farms, the actual output and farm income trends was not analysed in this report.

Production of primary produce in BBO (cereals, dairy, meet, vegetables and fruit) in the last 17 years has been under considerable strain, partly - from BSE-related pressures, foot-and-mouth disease and partly due to low levels of profitability.

The number of farms producing cattle & sheep and cereal farms has been relatively steady, with very few changes across the region.

While the number of livestock farms has maintained a very similar level between 1990 and 2006, the number of beef and dairy producers actually fell significantly.

The number of fruit and vegetable farms also has followed a downward trend, with fluctuations in each county and across the years, possibly caused by cheap imported produce and weather conditions.

The only positive trend has emerged in the case of pig and poultry farms. This trend may be a function of retailers extending their demand for ranges of specialist British pork and poultry products, as well as of very effective marketing agencies of the respective industries, i.e. British Pig Executive (BPEX) and British Poultry Council.

In order to look into the future and understand to what extent local farmers in BBO are looking forward and if they have any specific ideas, as well as what support they need, a questionnaire was sent with a covering letter to 161 producers mainly in Oxfordshire, Buckinghamshire and Milton Keynes, and Berkshire. Forty nine responses came via the post or the phone, and forty four of these were suitable for use in the survey. Responses came from all farm categories we analysed from the June Census Data, apart from "General Cropping".

Most responding farms are small enterprises with a turnover up to £250K (34 out of 46). 80% of respondents intend to be farming in the next 10 years and 45% out of these intend to change what they produce in 10 years.

60% of respondents do not intend to adopt new environmental or welfare practices (e.g. Seeking organic certification or Freedom Food accreditation) in the next 10 years. Of those who do, the most popular schemes seem to be "organic".

Our Questionnaire offered several skills areas to choose from and decide whether producers would be seeking to improve on: primary production, value added products, business skills: planning, legislation, finance, administration, marketing and promotion, market trends and information, employment law and recruitment, distribution. Marketing, primary production and value added products were the three areas most interesting to producers.

In terms of "new markets", most respondents still intend to trade "locally" (county wide), followed by Farmers Markets (again very local), then – selling to the catering sector and direct deliveries. Hospitality/catering sector seems to be fairly important to local producers.

It was encouraging to learn that the Food Groups figures as one of the main sources for information and help to current Food Group members and most respondents were current BBO Food Group members (38 out of 49).

Part 1: An overview of current production of primary agricultural products in BBO versus production 17 years ago (1990)

The analysis below focuses solely on primary production of food, produced by mainstream food businesses as part of the local food economy. For the scope of this report, "local" means Berkshire, Buckinghamshire, including Milton Keynes and Oxfordshire.

The analysis did not research value added foods, food processing and retailing, in order to simplify the study and to keep to the original aim.

Defra's June Agricultural Survey data were primarily used and analysed. The June Agricultural Survey is an annual survey of agricultural activity which collects information from carefully selected agricultural holdings in England relating to land use, crops, livestock, labour, horticulture and glasshouse.

In recent years it has actually been conducted as a sample survey, in which data is only sought from a proportion of holdings in each year. The exception to this is in every tenth year when EU regulations demand a complete census; 2000 was the most recent occasion.

The analysis was carried out for ten farm classifications, determined by Defra. A farm is allocated to a particular type (class) depending upon the main contribution by a crop or livestock type. There are several levels of detail provided for in the classification system, but at the simplest and most commonly used level, farms are divided into 10 "robust types" for analysis.

Until 2003 there were 9 robust types, or classifications. From 2004 there are 10 robust types, or classifications.

New Robust Types (Classifications) From 2004

1. Cereals
2. General cropping
3. Horticulture
4. Specialist Pigs
5. Specialist Poultry
6. Dairy
7. Less Favoured Area Grazing Livestock
8. Lowland Grazing Livestock
9. Mixed
10. Other (including Non-classifiable)

Old Robust Types (Classifications) Until 2003

1. Cereals
2. General cropping
3. Horticulture
4. Pigs & Poultry
5. Dairy
6. LFA Cattle and Sheep
7. Lowland Cattle and Sheep
8. Mixed
9. Other

The key changes to the system made in 2004 were: the separation of Specialist Pigs and Specialist Poultry into two different robust types, the extension of Cattle and Sheep types to include other grazing livestock (inc. goats and deer), the allocation of Specialist Mushroom farms to Horticulture instead of Other, and the separation of main type Specialist Hardy Nursery Stock from main type Other Horticulture.

Note: in order to observe a general trend, the category of farms under "Pigs and Poultry" have been kept together. Classifications under number 7, 8, 10 have been

analysed either within Dairy or not analysed at all, and considered insignificant for the purposes of this analysis or non-existent in the analysed area of BBO (zero values).

Below is a brief description of all used classifications:

Cereals:

farms on which cereals and other crops generally found in cereal rotations (e.g. oilseeds, peas and beans harvested dry and land set-aside) account for more than two thirds of their total Standard Gross Margin (SGM). These crops constitute a relatively homogenous group in that they are all harvested with a combine harvester and are readily interchangeable with little impact on the capital and labour required. Farms on which land set-aside accounts for more than two thirds of their total SGM - specialist set-aside holdings - are excluded from this type and included in the other robust type, which is not included within the field of survey of the Farm Business Survey.

General cropping:

farms on which arable crops (including field scale vegetables) account for more than two thirds of their total SGM excluding farms classified as cereals; farms on which a mixture of arable and horticultural crops account for more than two thirds of their total SGM excluding farms classified as horticulture and farms on which arable crops account for more than one third of their total SGM and no other grouping accounts for more than one third.

Horticulture:

farms on which fruit (including vineyards), hardy nursery stock, glasshouse flowers and vegetables, market-garden-scale vegetables and outdoor bulbs and flowers account for more than two thirds of their total SGM. This classification includes specialist mushrooms since 2004.

Pigs and poultry:

farms on which pigs and/or poultry account for more than two thirds of their total SGM.

Dairy:

farms on which dairy cows and followers account for more than two thirds of their total SGM.

Cattle and sheep:

farms on which cattle and sheep account for more than two thirds of their total SGM except farms classified as dairy. A farm is classified as a Less Favoured Area (LFA) farm if 50 per cent or more of its total area is in the LFA. Of farms classified as LFA, those whose LFA land is wholly or mainly (50 per cent or more) in the Severely Disadvantaged Area (SDA) are classified as SDA; those whose LFA land is wholly or mainly (more than 50 per cent) in the Disadvantaged Area (DA) are classified as DA. A farm is classified as lowland if less than 50 per cent of its total area is in the LFA.

Mixed: farms on which crops account for one third, but less than two thirds of total SGM and livestock account for one third, but less than two thirds of total SGM. It also includes farms with mixtures of cattle and sheep on the one hand and pigs and poultry on the other and holdings where one or other of these two groups is dominant, but does not account for more than two thirds of the total SGM.

Four more additional primary products: Vegetables in Open Field, Orchards, Small Fruit and Beef have also been analysed, using information available in the June Census.

Data from the Defra's June census were used and analysed in the following way:

1. Statistical figures were cut and pasted into Excel spreadsheet (Table 1) of the 3 counties: Berkshire, Buckinghamshire, including Milton Keynes, Oxfordshire.

The following datasets have been examined:

Queryable Dataset for England

- Until 2003 - Region to Ward (GOR-Government Office Region to Ward), searched by Local Authority, alphabetically, and by farm classifications described above.
- From 2004 - Region to SOA (GOR-Government Office Region to SOA - Super Output Area) searched by Local Authority, alphabetically, and by farm classifications described above.

Complete Datasets

- Regional Level data - data searched by Local Authority, alphabetically, and by farm classifications described above.

Publications - Standard Publications & Outputs

- Agricultural Statistics in the UK - searched by Local Authority, alphabetically, and by farm classifications described above

2. Table 1 was used to generate linear charts for each of the farm classification researched, using data for the same years (1990 – 2006), in the same units (farm holdings), for all 3 counties which allowed to get a picture of trends throughout the BBO region.

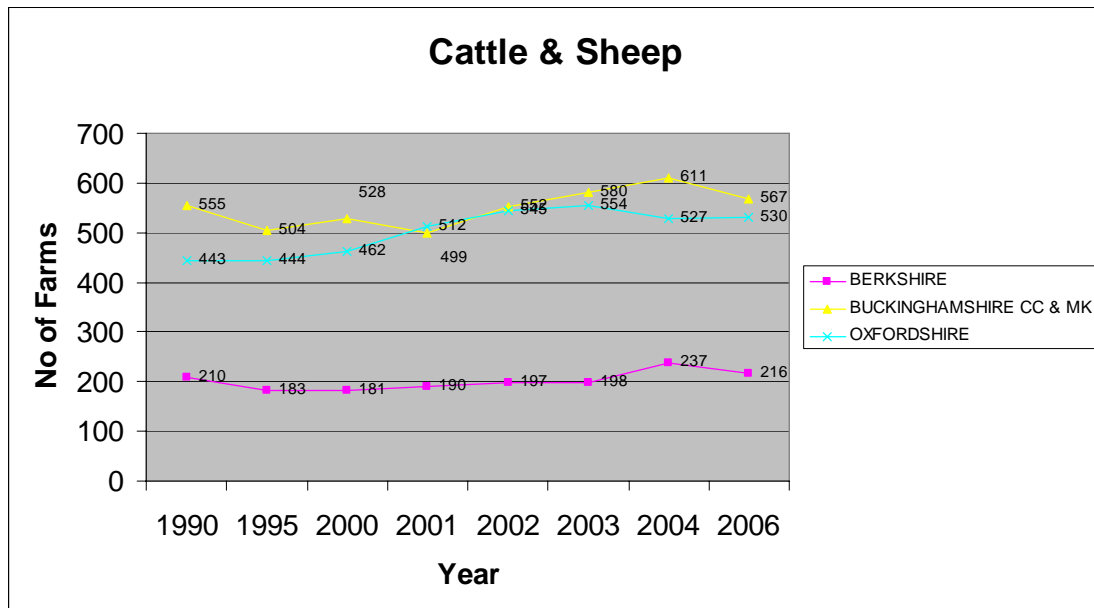
3. The charts were interpreted using Defra website, personal knowledge and experience and results of discussions with long-term farmers and agricultural consultants from the region.

Table 1
Data for BBO region on Primary Food Production in 1990 – 2006
Source: Defra June census, 2007

By no of holdings		1990	1995	2000	2001	2002	2003	2004	2005	2006
Cattle and Sheep	BERKSHIRE	210	183	181	190	197	198	237		216
	BUCKINGHAMSHIRE CC & MK	555	504	528	499	552	580	611		567
	OXFORDSHIRE	443	444	462	512	545	554	527		530
Cereals	BERKSHIRE	180	173	179	170	175	177	193	190	181
	BUCKINGHAMSHIRE CC & MK	380	301	393	326	396	393	421		416
	OXFORDSHIRE	651	640	632	599	615	636	673	676	656
Pigs & Poultry	BERKSHIRE	40	23	26	30	35	30	49	16	47
	BUCKINGHAMSHIRE CC & MK	73	58	56	59	65	74	88		94
	OXFORDSHIRE	61	45	74	90	97	88	98	37	116
Horticulture	BERKSHIRE	58	47	44	43	44	39	43	39	40
	BUCKINGHAMSHIRE CC & MK	89	76	78	85	82	77	76	76	72
	OXFORDSHIRE	115	86	93	91	92	89	93	108	104
Dairy	BERKSHIRE	68	56	35	36		29	25	35	24
	BUCKINGHAMSHIRE CC & MK	155	114	103	100	84	71	78		71
	OXFORDSHIRE	159	122	86	85	70	65	68	86	67
Mixed	BERKSHIRE	82	91	85	80	70	75	68	248	72
	BUCKINGHAMSHIRE CC & MK	224	203	172	151	164	157	168		151
	OXFORDSHIRE	283	263	243	216	209	195	207	524	200
General Cropping	BERKSHIRE	33	25	16			10	13	11	21
	BUCKINGHAMSHIRE CC & MK	33	22	23	18	13	13	13		25
	OXFORDSHIRE	67	59	36	34	34	39	41	38	47
Veg in open field	BERKSHIRE	41	31	25	21	18	15	17	18	20
	BUCKINGHAMSHIRE CC & MK	44	31	25	22	22	21	23	25	33
	OXFORDSHIRE	64	61	53	48	49	59	41	54	52
Orchards	BERKSHIRE	22	19	33	31	24	24	24	22	21
	BUCKINGHAMSHIRE CC & MK	38	39	45	53	46	50	51	59	44
	OXFORDSHIRE	39	34	64	60	59	69	72	85	69
Small fruit	BERKSHIRE	26	24	21	21	20	21	15	15	13
	BUCKINGHAMSHIRE CC & MK	30	28	24	25	21	20	23	25	25
	OXFORDSHIRE	41	44	31	30	27	30	33	44	30
Beef	BERKSHIRE	168	182	170	155	138	129	139	144	135
	BUCKINGHAMSHIRE CC & MK	440	446	412	391	344	316	360		323
	OXFORDSHIRE	468	433	377	371	332	333	334	345	361

Cattle and Sheep

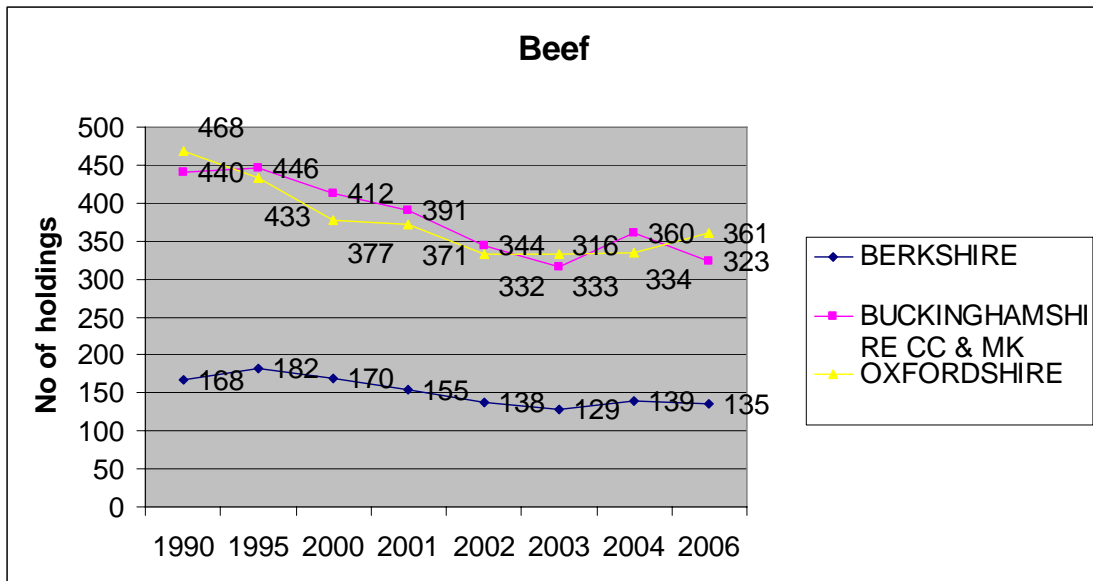
These are farms on which cattle and sheep account for more than two thirds of their total Standard Gross Margin (SGM), except farms classified as dairy.



BBO counties are considered “livestock” counties in the South East of England and the trends for the reporting period (1990 – 2006) shows a relatively steady progress, with numbers in Oxfordshire slightly going up.

Although sheep can be found in every county of Britain, the industry was under considerable strain from BSE-related pressures, foot-and-mouth disease and low levels of profitability. A 2003 Defra¹ report on the sheep industry in England and Wales writes that “farm numbers reached their lowest for a long time ... a loss of about 30% of farms since the last survey (1996). In addition to a lower number of farms, flock and sheep numbers have also declined.” There appears to be a large decrease in farm numbers after 2004, probably due to falling sheep farming profitability.

¹ The breeding structure of the British sheep industry 2003, by G.E. Pollott & D.G. Stone



Production of beef in the region fell steadily, following the outbreak of BSE and F&MD, which hit farmers hard.

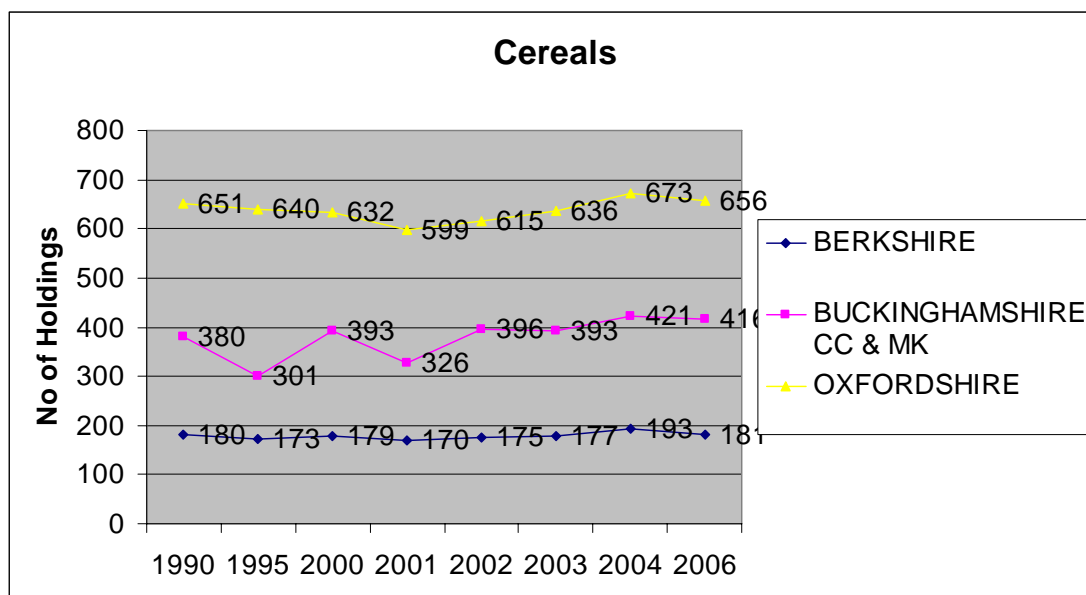
The changes in prices of finished cattle and lambs were much smaller than the changes in crop prices in 2006. In March 2007, the price of finished cattle was about 5% higher than a year earlier, that of finished lambs about 6% lower and the price of milk about 3% lower.

Only cattle producers have reason to be more optimistic. This is reflected in the intended increase in the headage of finishing beef, while for other livestock categories reductions continue to be reported².

² Farmers' Intentions in the Context of CAP Reform in England – Analysis of ADAS Farmers' Voice 2007 Survey, ADAS, 2007

Cereals

Farms on which cereals and other crops generally found in cereal rotations (e.g. oilseeds, peas and beans harvested dry and land set-aside) account for more than two thirds of their total Standard Gross Margin (SGM). These crops constitute a relatively homogenous group in that they are all harvested with a combine harvester and are readily interchangeable with little impact on the capital and labour required.



With various slight fluctuations in number of farms, the production of cereals shows a minor trend upwards, until 2004, and a general new trend beginning to fall down after 2004. This change may be linked to the CAP Reform agreement in 2003². “The 2003 CAP reform is a major driver behind the intentions of farmers but not the only one.

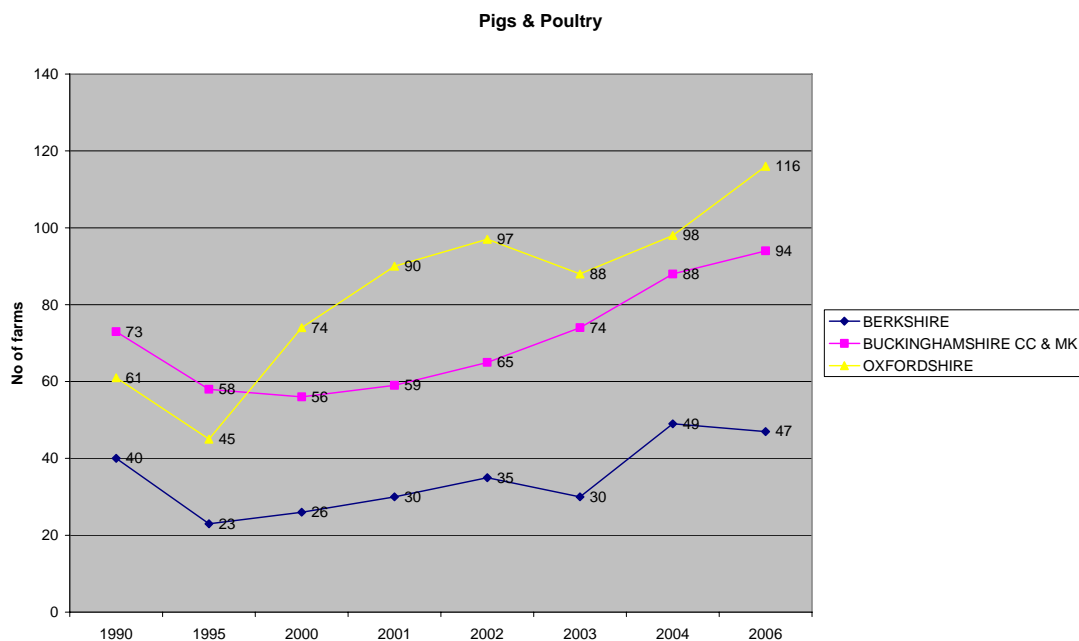
The chart displays the general trend towards fewer, larger holdings. In arable, for example, although the total area remained relatively constant over this five year period the figures for each crop all show a decrease in the number of holdings leading to an increase in average size.”

Another important factor in the trend may be the change in farm product prices. The big changes from 2005 to 2006 will probably show a turn upward of the production trend in the forthcoming years. The average UK prices for crops have shown a significant recovery in 2006, particularly towards the end of 2006. High crop prices remained firm until March 2007 and remained so in July 2007. Compared to a year earlier, in March 2006 the prices of wheat and barley were about 32% higher. Oilseed rape was maintaining in March 2007 the much higher price that had developed in 2006, about 26% higher than in 2005. The largest change in cereal production is reported for energy crops and oilseed rape, although it must be acknowledged that this will influence negatively the production of food crops, such as wheat and others.

² Farmers' Intentions in the Context of CAP Reform in England – Analysis of ADAS Farmers' Voice 2007 Survey, ADAS, 2007

Pigs & Poultry

farms on which pigs and/or poultry account for more than two thirds of their total SGM.



Although limited in the total number of farms in each county, production of pigs and poultry has been clearly growing in the area. This trend may be a function of retailers extending their demand for ranges of British pork and poultry products, as well as of very effective marketing agencies of the respective industries, i.e. British Pig Executive (BPEX), British Poultry Council (BPC) and others.

For pig production, though, it appears from the National Pig Association data that “production of British pork has declined sharply due to price pressure, disease outbreaks and the undermining of confidence to invest. In the last year (2007) there are signs of some stability but much still needs to be done. The England pig production and processing sectors face considerable challenges. Consumer perception of pork as high in fat is at variance with the facts. The production sector remains at the bottom of the EU cost of production league, retailer and food service concentration and power are increasing and political negotiations are likely to result in a liberalisation of world trade within the next three years.”³

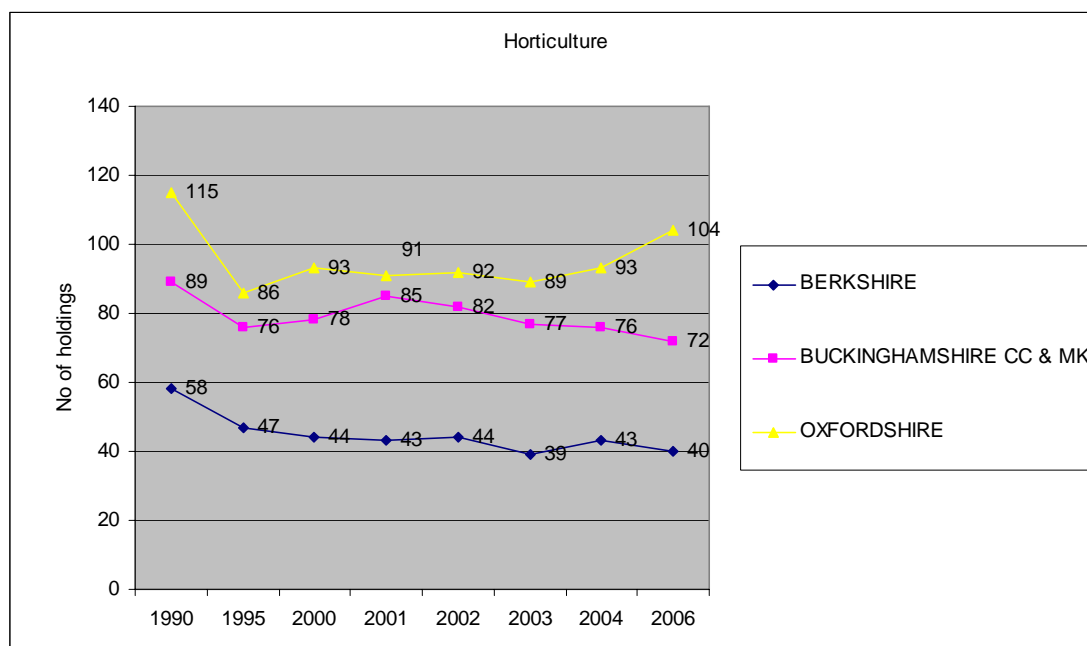
Nevertheless, the British pig industry is currently under extreme and growing pressure caused by significant increases in world-wide feed prices - these have doubled in the past year. The cost of feed accounts for almost half the cost of producing a pig.⁴

³ <http://www.npa-uk.org.uk/>

⁴ <http://www.britishtpigsareworthit.co.uk/>

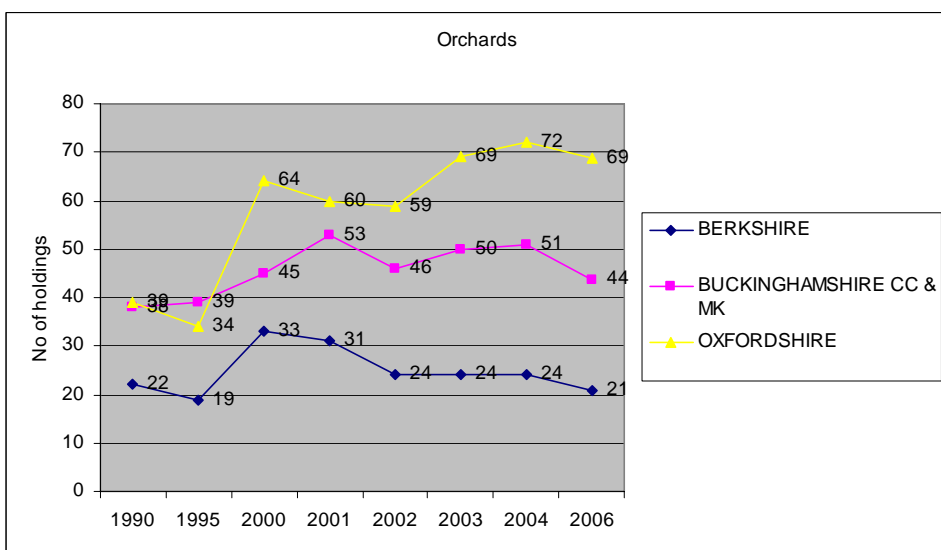
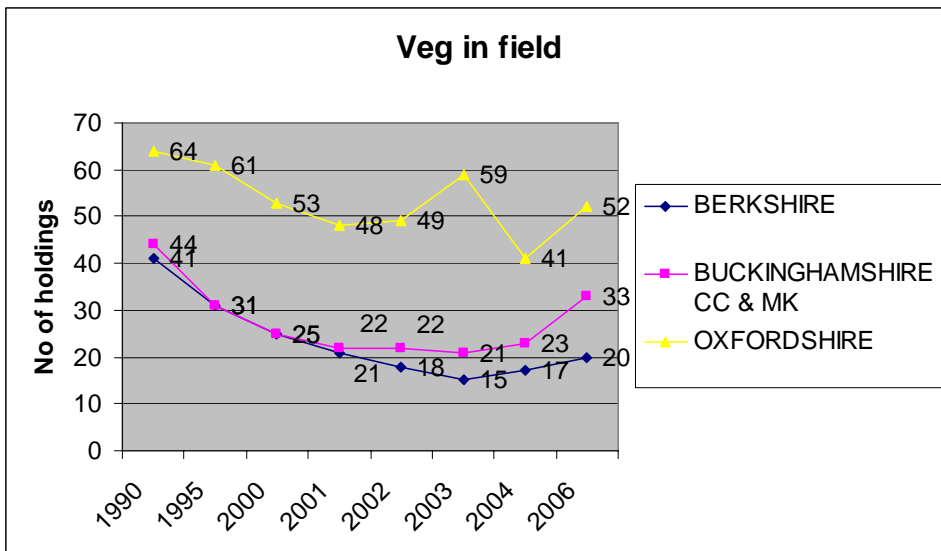
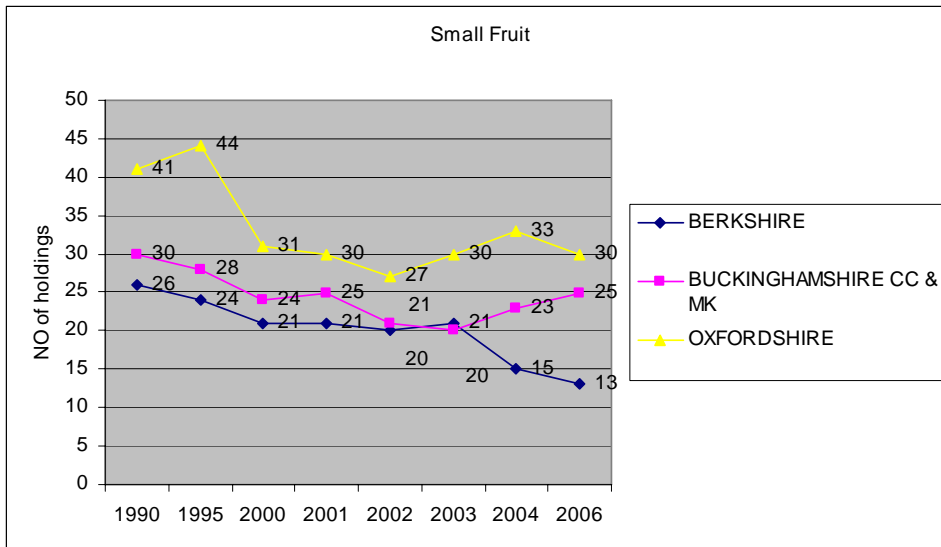
Horticulture:

farms on which fruit (including vineyards), hardy nursery stock, glasshouse flowers and vegetables, market-garden-scale vegetables and outdoor bulbs and flowers account for more than two thirds of their total SGM. This classification includes specialist mushrooms since 2004.



The horticulture sector encompasses around 300 different products. Though often lumped statistically with agriculture, horticulture is a significant industrial sector in its own right and has some very different socio-economic characteristics. Many of the production and retail enterprises are small businesses. Increasing consumer preference for locally sourced produce of known provenance is creating new market opportunities for local producers. There is, however, general recognition that the lack of public funding of production-oriented R&D, even though market failure remains a feature of the largely fragmented industry and a lack of clarity about Government policy towards horticulture may be the cause for the sector not developing in line with market demands and opportunities. Other factors, influencing the development of horticulture relate to high risks, high capital demand and high labour demand (costs of housing/accommodation).

The charts below show several trends for specific crops, such as Potatoes and other field scale vegetables, tree fruit and soft fruit.



“England's world-renowned fruit orchards were cut down in 2002 at a record rate, raising fears that English apples and pears would disappear from supermarket

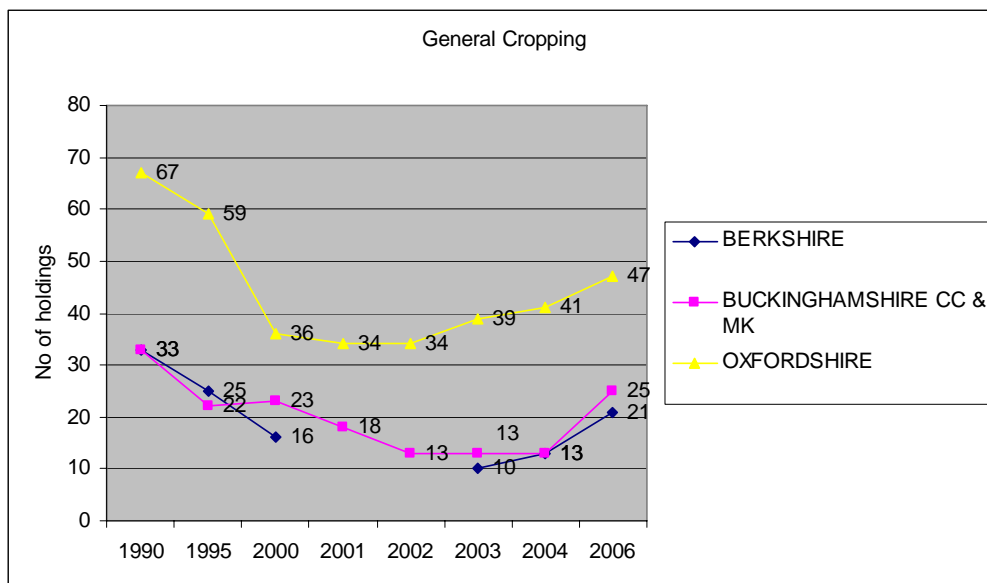
shelves within 10 years. The official figures from the English Apples and Pears Trade Association revealed that the number of fruit trees across the country nearly halved since 1990, when there were 41,200 hectares of orchard producing millions of Cox's Orange Pippin, Conference pears and Victoria plums each year. ... The drop in fruit orchards - more than 2,500 hectares were destroyed in 2002 - shocked the country's leading fruit growers."⁵

Why has this occurred and what can be done to reverse the change?

Says Gillian Franklin, Cross Lanes Farm, Berkshire: The Farming industry in Britain and the apple industry in particular has taken a real battering in the last twenty years. Various events have connived to wreak the havoc including the growth of imports from 3rd world countries, the growth of supermarkets, the adoption of the Common Agricultural Policy and the ever increasing burden of regulation on small businesses." Please read a full view on The state of the fruit industry, by Gillian Franklin in [Appendix 2](#).

General cropping:

farms on which arable crops (including field scale vegetables) account for more than two thirds of their total SGM excluding farms classified as cereals; farms on which a mixture of arable and horticultural crops account for more than two thirds of their total SGM excluding farms classified as horticulture and farms on which arable crops account for more than one third of their total SGM and no other grouping accounts for more than one third.



The trend in BBO reflects the national trend for the production of potatoes, which was analysed by the British Potato Council in 2006. "In the last 5 years there has been a significant downward trend in production.⁶ This may reflect climatic change, but is also due to a tendency to produce smaller sized tubers for a changing market. The number of growers declined, as well as planted areas. This implies that there has been great consolidation in the industry, with the average grower in 2006 having 41 ha of potatoes, versus 5.5 ha in 1970.

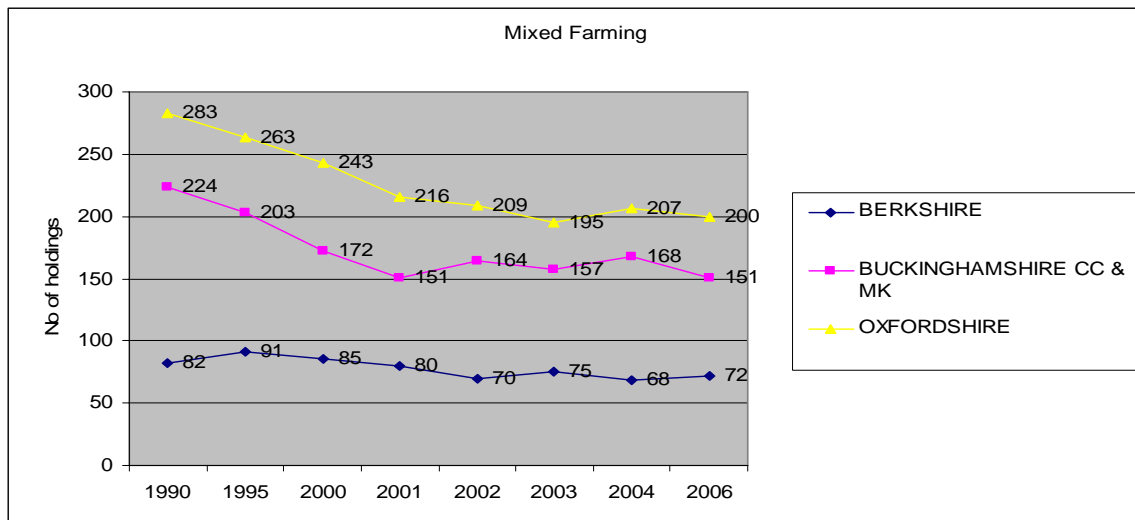
⁵ Article by Severin Carrell, Independent on Sunday, 29th December 2002

⁶ Denis Alder, BPC Market Information & Statistics

Dairy and Mixed Farming :

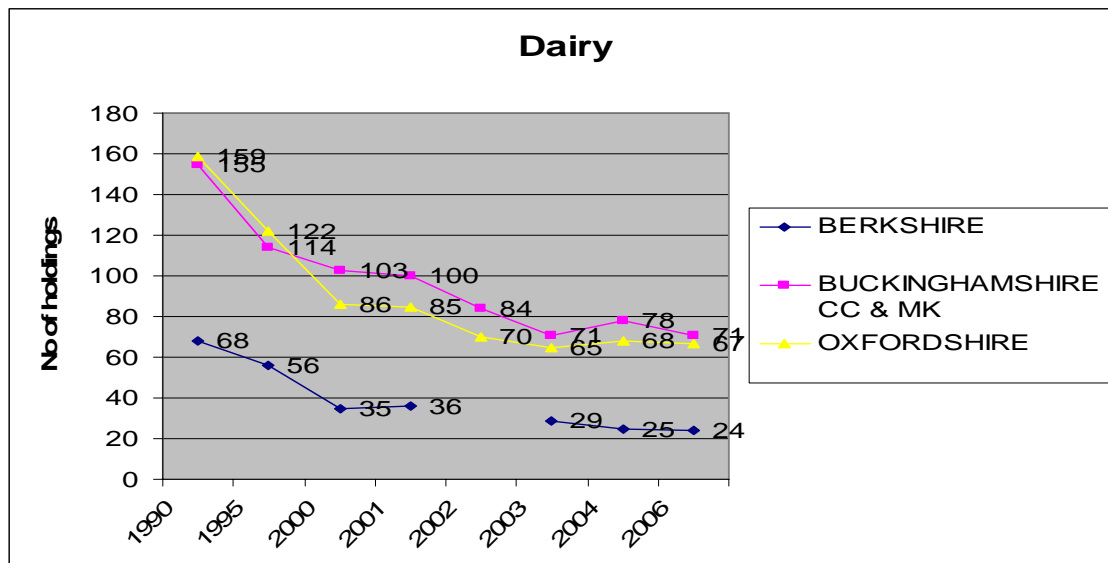
Dairy farms on which dairy cows and followers account for more than two thirds of their total SGM. A farm is classified as a Less Favoured Area (LFA) farm if 50 per cent or more of its total area is in the LFA and a lowland farm if less than 50 per cent of its total area is in the LFA.

Mixed farms on which crops account for one third, but less than two thirds of total SGM and livestock account for one third, but less than two thirds of total SGM. It also includes farms with mixtures of cattle and sheep on the one hand and pigs and poultry on the other and holdings where one or other of these two groups is dominant, but does not account for more than two thirds of the total SGM.



The sharp downward trend in the number of dairy and mixed farms coincides with the general trend in agriculture of industry consolidation, with a lower number of active farms, often organised in cooperatives, with larger areas and higher number of livestock. A recent Dairy UK report *International competitiveness of UK dairy processors*⁷, shows that “the UK dairy processing sector generates higher levels of Value Added per employee and delivers higher levels of profitability with an average return of 17%, but does generate lower levels of revenue per unit of milk processed, which may in part be linked to the significantly lower overall investment in R&D.”

⁷ © 2007 KPMG LLP, Dairy UK Limited International competitiveness of UK dairy processors



Provisional UK wide results for the June Survey of Agriculture⁸
(September 2007)

Crops

- The total area of crops has fallen by 0.5% to 3.7 million hectares in June 2007. The overall cereals area is very similar to that recorded last year.
- The wheat area is down by 0.9% on June 2006. Regional estimates of wheat areas show small decreases across the main wheat-growing areas (the Eastern and East Midlands regions). The total wheat area recorded in June 2007 is also lower (by 1.8%) than our area estimate for December 2006, though is within the confidence range. This reduction is largely due to our estimate of the wheat area from new holdings – the level recorded in the December survey has not been reproduced in the larger June survey.
- The area of barley has risen by 0.2% while the area under oats has again risen considerably (up 9.7% on June 2006).
- There has been a large increase in the area of oilseed rape. Our estimate for June 2007 is over 100 thousand hectares higher (21.9%) than for June last year. This corresponds with the large increase in planted area recorded in our December survey.
- The area of sugar beet continues to fall and is 6.1% lower than 2006. There are also substantial falls in the area of field beans (35.4%) and peas for harvesting dry (21.8%).

Livestock

- There were 5.6 million cattle in England at June 2007, a fall of 2.5% on last year. Note that we are now sourcing our cattle data from the Cattle Tracing System and the figures for 2005 and 2006 have been revised to ensure consistency.
- The number of cows (aged 2 or more) in the beef herd has fallen by 1.3% and the number in the dairy herd has fallen by 1.8%.
- There were 4.0 million pigs in June 2007, down 0.9% on June 2006. The pig breeding herd has fallen 3.3% to 373 thousand.
- Total sheep and lamb numbers are down 3.1% on last year to 15.2 million. The fall is greater for the breeding flock (5.3%) than the lambs (1.7%).

⁸ SURVEY OF AGRICULTURE AND HORTICULTURE: 1 JUNE 2007 ENGLAND - PROVISIONAL RESULTS
Stats 23/07 20 September 2007

Part 2: An overview of to what extent local farmers in BBO are looking to the future and if they have any specific ideas, as well as what support they need

1. Data collection

Questionnaires were sent with a covering letter to 161 producers mainly in Oxfordshire, Buckinghamshire and Milton Keynes, and Berkshire, the mailing was followed up with a telephone call to 51 producers. Forty nine responses came via the post or the phone, and forty four of these were suitable for use in the survey.

Number of farmers contacted by letter: 161

Total number of responses: 51

Number used in Survey: 46

2. Responses by County

County	
Berkshire	6
Buckinghamshire	12
Milton Keynes	3
Oxfordshire	22
Northamptonshire	1
Swindon	1
Bedfordshire	1
Total	46

3. Collated responses

Section 1: Current Production

Note: For natural language responses please see separate categories sections below.

1 Which of the following best describes your farming practice?

Note: A number of producers felt that more than one category was appropriate for their farming practice.

Pigs and Poultry	4
Cereals	2
Cereals with horticulture	2
Cereals with cattle and sheep	1
Dairy	5
General Cropping	0
Cattle and sheep	10
Horticulture	9
Mixed	7
General Cropping & Horticultural	1
Pigs and Poultry plus Cattle and Sheep	5
Total	46

2. What was your turnover for the last financial year?

£0-£250K	34
£251- £750K	5
£751 +	7
Total	46

Section 2 – Future Production

1. Do you expect to be farming in 10 years time? Yes / No

Yes	37
No	9
Total	46

2. Do you expect to change what you produce in the next 10 years? Yes / No

Yes	17
No	27
Maybe	2
Total	46

3. Do you think you will be adopting new environmental or welfare practices (e.g. Seeking organic certification or Freedom Food accreditation) in the next 10 years?

Yes	13
No	28
Possibly	4
No answer	1
Total	46

If Yes, please give details:

More intensive work to reduce carbon footprint and energy consumption (already organically certified)	1
LEAF Accreditation	2
Organic	4
Increase organic area on farm	2
FABBL	
Other assurance schemes	1
No details	2
Other Comments: De-registered from Freedom foods- a waste of money.	1
If organic certification is cheaper then yes.	2
See www.fairfarma.co.uk . We do the research!	1
If found necessary	1
hi) We have to on our cereal production. We have just invested in a new grading line to help stop damaging potatoes.	1

Already organic – other accreditations considered	1
More environment sensitive issues addressed	1
Maybe organic	1
Entry level scheme	1

Section 3: Skills for New and Developing Enterprises

1 Will you be seeking new skills in any of the following areas?

	yes	Possibly
Primary production	19	1
Value added products	18	5
Business skills: planning, legislation, finance, administration.	13	2
Marketing and promotion	22	4
Market trends and information	11	1
Employment law and recruitment	9	1
Distribution	7	1
Other	2	

Section 4: New Markets

1. Which of the following markets are you expecting to sell to in the next 10 years?

	Yes	Maybe
Local (County wide)	36	
London	9	
European	1	1
Farmers Markets	24	
Catering	17	
Public sector	7	
Regional (SE of England)	7	
UK	6	
International	2	
Direct delivery box scheme	12	
Supermarkets	7	1
Other Private school catering		
Other (on line sales)	2	
Other:Farm gate	2	
Other:Local Shops	1	
Other: Selling milk to a separate but on-farm ice cream business which is now covering the whole of the UK and internationally.	1	

3 Does this help (to access these markets) already exist to your knowledge?

Yes	26
No	2
N/A	7
Maybe	2
A little	1
Sometimes	1
Don't know	1

3 If Yes, where is this help available from?

Food Group	12
Ethical Food Co	1
T.V.F.M.A.	
Business link	7
ADAS	1
HTA	1
Kelly Turkeys	1
DEFRA	3
SEEDA	2
District Council	1
Other (not specified)	1
Farmers Markets	1
MLC	1
Societies (cattle)	1
Press and media, pressure groups, consumer groups, T.V.	1
EBLEX	1
NFU	1
Own training group	1

4. Do you already belong to your local food group?

Yes	38
No	8
Total	46

1 Responses by category

Cattle and Sheep

Total number in this section: 10

Geographical location	
Berkshire	1
Buckinghamshire	4
Milton Keynes	1
Oxfordshire	4

Section 1: Current Production

1 Which of the following best describes your farming practice?

Cattle and Sheep	10
------------------	----

2 What varieties or breeds do you currently produce?

Sheep: Scotch half bred put to a Suffolk ram
Sheep: Charollais, Lleyn
Aberdeen Angus and Belgium Blue and Highland cattle
Llanwenog Sheep, Limonsin X Cattle
Hereford, Shetland and Hampshire sheep, Oxford Black Spot pigs, Roade Island Chickens

Closed flock of home breed sheep
Old English leghorns, Dexter, Aberdeen Angus, Highland, Cherleias, Limousin, Gelbvieh
ISimmetal X, Aberdeen Angus X, Beef cattle, British Friesian Heifers
Aberdeen Angus Cattle, Hampshire Down Sheep, Saddleback pigs

3 What was your turnover for the last financial year?

£0-£250K	9
£251- £750K	1
£751 +	
Total	10

4. On what soil type do you primarily farm?

Clay	2
Medium clay	1
Sandy to clay	1
Chalk loam	1
Oxford Clay	1
Heavy Loam	1
Ironstone	1
Greensand and Kimmeridge Clay	1
No Answer	1

Section 2 – Future Production

1. Do you expect to be farming in 10 years time? Yes / No

Yes	9
No	1

If No, will you be using your land for other activities (such as tourism, leisure, property [e.g. Office rental])? Please specify:

- retiring.

2. Do you expect to change what you produce in the next 10 years? Yes / No

Yes	3
No	7

If Yes, what will you be changing to?

- Adding a caravan site.
- Possibly adding other classes of livestock.

3. Do you think you will be adopting new environmental or welfare practices (e.g. Seeking organic certification or Freedom Food accreditation) in the next 10 years?

Yes	2
No	4
Possibly	4

If Yes, please give details:

If organic certification is cheaper then yes.	1
Already organic – other accreditations considered	1
Maybe organic	1
To expensive at the moment. We are FABBL. Customers can see we are 'organic' but not registered.	1
Considering going organic for suckler herd	1

Section 3: Skills for New and Developing Enterprises

1 Will you be seeking new skills in any of the following areas?

Please give as much detail as you can in each relevant box:

	yes
Primary production	4
Value added products	5
Business skills: planning, legislation, finance, administration.	1
Marketing and promotion	7
Market trends and information	3
Employment law and recruitment	
Distribution	2

Primary production

- Bio-dynamic Farming
- Growing more salad and unusual veg.
- Beef – possibly pig, poultry and sheep husbandry.

d Value added products

- Adding value to meat by improving butchery
- Preparing meat fro retail sector.
- Buy local, getting people to buy seasonal

Business skills

- Business planning

Marketing and Promotion

- Leaflet production, display and better presentation at farmers markets
- Communicate with schools and old peoples homes
- Website design and maintenance
- An early lambing sheep flock requires marketing effort in niche market to obtain premiums to meet high costs.

Market trends and information

- Promote more veggie boxes

Employment law and recruitment

Distribution

- Sales through website.

Section 4: New Markets

	Yes
Local (County wide)	8
London	3
European	
Farmers Markets	6
Catering	1
Public sector	1
Regional (SE of England)	3
UK	1
International	
Direct delivery box scheme	3
Supermarkets	1
Other: Farm gate	1

2 What help if any might you need to gain access to these markets (for example a facilitator to help match producers to public sector caterers, or representation at national food fairs)?

- None: We are not big enough.
- Bringing local food nearer and directly to the customer.
- Promotional material for use by independent butchers.

3 Does this help already exist to your knowledge? Yes / No

Yes	5
No	
No answer	4
Don't know	1

4 If Yes, where is this help available from?

Food Group	1
Farmers Markets	1
MLC	1

5. Do you already belong to your local food group?

Yes	8
No	2

Further points you wish to make

- We consider the Food Group is doing a good job in promoting local produce, for example at the Bucks show.

Horticulture

Defined as: Fruit (including vineyards), glasshouse flowers / vegetables, market garden scale vegetables.

Total number in this section: 10

Note: One farm (ref:q) had put themselves in the 'general cropping' category and 'horticulture'. Because they were the only respondent the general cropping category they have been including in the horticulture section.

Geographical location	
Berkshire	1
Buckinghamshire	2
Oxfordshire	6
Swindon	1

Section 1: Current Production

1 Which of the following best describes your farming practice?

Horticulture	9
Horticulture and general cropping	1

2 What varieties or breeds do you currently produce?

A vast number including: Discovery, Worcester Pearmain, Lord Lanbourne, Cox's orange pippin, Egremont Russeh, Blenheim Orange Ribston Pippin, Orleans Rennette, Kidd's Orange Red, Pitmaston pineapple, Sparton, Winter King, Ashmead Kernel, Sturmer Pippin.
huge number' top three 1. Bedding plants 2. Xmas trees 3. soft fruit (strawberries and raspberries)
Over 80 different kinds of fruit and veg: Top three 1. Potatoes 2. Squash 3. Brassicas
A wide variety of vegetables.
Vines: White Chardonnay, Bachus, Reichensteiner, Red Dornfelder, Dunkelfelder, Pinot Noir..
No answer
Vines: Bacchus, Huxeluebe, Findling, Perle, Ortega, Domfelder, Rondo, Kerner, Dunken felder.
Over 80 different kindswof fruit and vegetables. Also eggs.
A huge number

3 What was your turnover for the last financial year?

£0-£250K	7
£251- £750K	2
£751 +	1

4. On what soil type do you primarily farm?

Chalk base with clay top	1
Sandy clay loam	1
Clay loam	2
Loam	1

Silt / Loam	1
Sandy loam	2
Deep sandy soil	1
Sand to loam to clay	1

Section 2 – Future Production

1. Do you expect to be farming in 10 years time? Yes / No

Yes	9
No (Farm will return to landlord)	1

If No, will you be using your land for other activities (such as tourism, leisure, property [e.g. Office rental])? Please specify:

- YES BUT: Vine yard is also a tourist attraction and we plan to develop this when funds are available.

2. Do you expect to change what you produce in the next 10 years? Yes / No

Yes	2
No	7
Don't know	1

If Yes, what will you be changing to?

- Fruit production will end. More Salads, herbs and cut flowers and wheat will be grown.
- Hanging type of vegetables to make more resilient to changing weather conditions. Adding cereal to crops grown.
- Don't yet know – we will respond to the market.

3. Do you think you will be adopting new environmental or welfare practices (e.g. Seeking organic certification or Freedom Food accreditation) in the next 10 years?

Yes	2
No	7

If Yes, please give details:

More intensive work to reduce carbon footprint and energy consumption (already organically certified)	1
Entry level scheme	1
No - We are already organic	1
No – Organic vineyards require more chemical sprays than non-organic!	1

Section 3: Skills for New and Developing Enterprises

1 Will you be seeking new skills in any of the following areas?

Please give as much detail as you can in each relevant box:

	yes	Possibly
Primary production	4	
Value added products	4	2
Business skills: planning, legislation, finance, administration.	5	1
Marketing and promotion	6	1
Market trends and information	5	
Employment law and recruitment	1	2
Distribution	2	
Other	1	

Primary production

- Yes soil management, training and pest control.
- By attending more shows, open days etc and via the trade press.
- Always developing but essentially we know enough.
- Biggest constraint on growth lack of primary production skills amongst workers. Farm will be offering placement for apprentice scheme to help address this.

Value add products

- Cut flowers for local market as value added product. Develop cereal production.
- We will be taking advanced wine making courses.
- Would like to market potato salad and chips in the future.
- Preparing meat fro retail sector.
- Developing red wines, rather than just white.
- Possibly setting up kitchen to add value to products.
- Developing red wines rather than just white.

Business skills

- We know enough – just need the time and money to apply it!
- Computing skills to help with marketing.
- Databases (e.g. access)
- Administration

Marketing and Promotion

- PR, web and Internet.
- Teaching skills.
- We need time and money to apply what we know and put what we know into practice. Marketing and production very expensive.

- Develop more skills in profit food service sector
- Organizing courses

Market trends and info

- Always watching for opportunities but expensive to market.
- Always looking at the market.
- Always trying to keep ahead.
- To keep up to date with changes in customer demand and the supply chain.
- No – use gut feeling and customer feedback.
- This is continual.

Employment law and recruitment

- Keep myself up to date via Internet.
- Try not to employ by keeping small.
- Given up trying to keep up with insane Govt. laws!

Distribution

- Always looking for new outlets or cheaper distribution means.
- Keep up to date with changes in the supply chain.

Other (please specify)

- Sourcing of materials takes a lot of study for example finding the cheapest good bottles etc.

Section 4: New Markets

	Yes	Maybe
Local (County wide)	9	
London	1	
European		
Farmers Markets	6	1
Catering	4	
Public sector	1	
Regional (SE of England)	2	
UK	1	
International		
Direct delivery box scheme	3	
Supermarkets	1	

What help if any might you need to gain access to these markets (e.g a facilitator to help match producers to public sector caterers, or representation at national food fairs)?

- Food group for local promotion and support
- continued advice from the sector and help with on-line selling

- General help in raising awareness regards the important of buying local and organic.
- Active recommendation of our products to distributors, shops, bars etc.
Representation at fairs, subsidized places at fairs since many are way outside our budget. Subsidized ads. In promotional magazines.
- Support to L.A.s to encourage Farmers Markets.
- Currently no problems, however in 2010 and onwards it would be helpful to have representation at National Food Fairs. Small producers can't always find the time / money to run a full stall, and maybe stalls run co-operatively, with a mixture of different producers doing tastings, and contributing fees would be good – more interesting than just poor Tamara on her own.
- Distribution system to local outlets – grower co-op.

Does this help already exist to your knowledge? Yes / No

Yes	5
No	1
N/A	3
A little	1

If Yes, where is this help available from?

Food Group	
ADAS	1
HTA	1
Press and media, pressure groups, consumer groups, T.V.	1
NFU	1

Do you already belong to your local food group?

Yes	10
No	

Further points you wish to make

- Environment and sustainability paramount in addressing needs of the industry. Concern over peak oil crisis and greatest help would be support in addressing this.
- Cost of promotion at fairs etc is beyond us. We have the knowledge but need money to promote sales which will enable expansion and development. Therefore progress is slow. Local council planning restricts advertising. New licensing laws restricts promotion.

Pigs and Poultry

Collated answers by category: Pigs and Poultry

Also included in this category are farms that put themselves in the Pigs and Poultry category but also have cattle and sheep.

Total number in this section: 9

Geographical location	
Berkshire	1
Buckinghamshire	3
Oxfordshire	4
Northamptonshire	1

Section 1: Current Production

1 Which of the following best describes your farming practice?

Pigs and Poultry only	4
Pigs and Poultry plus cattle and sheep	5

2 What varieties or breeds do you currently produce?

k) Kelly bronze Turkeys, free range for Xmas and thank giving. Franchisees.	
L)No answer.	2
m)Turkeys: Norfolk bronze and white (small strain xmas breeds and large catering stages) Broiler chickens: Ross cobbs and hubbards (free range) Ducks (Aylesbury), Guinea fowls	4
p)Bronze and white feathered Turkeys. Also rare and heritage breeds (gold and silvered feathered).	5
U)Hereford Cattle, Saddleback pigs	6
Y)Lohman chickens, Suffolk sheep	7
Ai)Cattle (Salers) Sheep (Coopworth and suffolk), Pigs (Gloucester Old Spot), Poultry (Chickens (JAS and Rod Zeb), Turkeys Norfolk Bronze.	8
Li) Gloucester Old Spot pigs, Mules ewes and continental rams	9

3 What was your turnover for the last financial year?

£0-£250K	6
£251- £750K	1
£751 +	2

5. On what soil type do you primarily farm?

Chalk	2
Clay	2
Clay and flood plan mix	1
Ironstone brash	1
None (Diversification – not producing from soil	1
Heavy Clay over lime stone	1
Sand / gravel	1

Section 2 – Future Production

1. Do you expect to be farming in 10 years time? Yes / No

Yes	7
No	2

Answered 'yes' but commented:

- 'Diversified but see strong future for barn / free range eggs marketed locally (as small scale).
- 'As well as tourism and rental'.

If No, will you be using your land for other activities (such as tourism, leisure, property [e.g. Office rental])? Please specify:

- Hope to sell or retire.
- Will retire.

2 Do you expect to change what you produce in the next 10 years? Yes / No

If Yes, what will you be changing to?

Note: 'Yes' does not always mean a complete change, rather an addition to existing production, for example producing Turkeys for an Easter market as well as a Christmas one.

Yes	3
Yes: Include some mixed cropping	
Yes: Turkeys for an Easter market as well as a Christmas one.	
Yes: Whatever the market demands and we can make a profit.	
No	6

3 Do you think you will be adopting new environmental or welfare practices (e.g. Seeking organic certification or Freedom Food accreditation) in the next 10 years? Yes / No

Yes	3
Yes: Organic Status and possibly other assurance schemes to facilitate better marketing	
Yes: We will continue to adapt using best farming practices to meet the demand of our customers. Demand for our organic products continues to grow and we will convert as required.	
Yes: See www.faifarms.co.uk . We do the research!	
No	6

Section 3: Skills for New and Developing Enterprises

1 Will you be seeking new skills in any of the following areas?

Please give as much detail as you can in each relevant box:

	yes	Possibly	No
Primary production	4	1	4
Value added products	3	3	3
Business skills: planning, legislation, finance, administration.	5		4
Marketing and promotion	5	1	3
Market trends and information	3		6
Employment law and recruitment	3		4
Distribution	3		6
Other	1		

Primary production

- As the enterprises and mix changes and personal changes. As we take on more farming operations.
- Always looking to improve on our production methods. This improves our profitability and our image with the public, areas we are now adopting are lower inputs e.g. Fertilizer sprays etc.
- Should market demands require new sets of skills we will train new or existing staff accordingly. As a seasonal producer we normally require some staff training before each season.
- Update skills in vegetable production and animal husbandry.

Value add products

- Preparing meat for retail sector. Having just opened our own Butchery we will be looking to develop this and the product ranges we have.

Business skills

- All these areas are important to our future development and I will need to increase my skills in all areas.
- We have a budget for training and will use it to ensure staff are well equipped to carry out their roles successfully and efficiently.
- Any of the above or similar that become available and are relevant.
- Project management for specific projects

Marketing and Promotion

- Probably through consultancy services
- Will need as the market comes more competitive more help with marketing
- We have skilled professionals in this area but continue to develop these people in niche areas of marketing as required.
- All these areas are important to our future development and I will need to increase my skills in all areas.

Market trends and information

As a seasonal producer our market is extremely niche we are more likely to be a source of market information in our area than benefit from anyone else's learning. However general retail reports made available at a basic rate would be useful.

Employment law and recruitment

Always useful to be up to date in this area, therefore training is likely to be sought at some point.

Distribution

Due to the seasonal nature of our business and as it continues to grow, distribution becomes more of a challenge. We are now distributing to over 300 stockists nationwide, within a seven day period. Doing this cost effectively and receiving reliability from our chosen distribution partners will not be sustainable without new methods / skills and partnerships in this area.

Other (please specify)

Educational visits to farms

Section 4: New Markets

	Yes	Maybe
Local (County wide)	6	
London	4	
European	1	1
Farmers Markets	4	
Catering	4	
Public sector	1	
Regional (SE of England)	2	
UK	2	
International		
Direct delivery box scheme	3	
Supermarkets	3	
Other Private school catering		
Other (on line sales)	1	
Other: Farm gate	1	
Other: Local Shops (Oxon)		
Other: Selling milk to a separate but on-farm ice cream business which is now covering the whole of the UK and internationally.		

2 What help if any might you need to gain access to these markets (for example a facilitator to help match producers to public sector caterers, or representation at national food fairs)?

- Information to catering and restaurant trade about real cost of production on farms, of quality products. Easier access to grants and L.A. Funds that may be available to develop markets and small businesses.
- Export regulations and translation services
- Business promotion
- Promotional funding always helpful.

3 Does this help already exist to your knowledge? Yes / No

Yes	7
No	1
Maybe	1

3

4 If Yes, where is this help available from?

Food Group	2
T.V.F.M.A.	1
Business link	3
Kelly Turkeys	1
DEFRA	2
SEEDA	1
EBLEX	1
Looking at partnership with existing exporter which hopefully will give us access to information , regulations etc.	1

5. Do you already belong to your local food group?

Yes	7
No	2

Further points you wish to make

No further points made in this section.

Mixed

Total number in this section: 7

Geographical location	
Berkshire	2
Milton Keynes	1
Oxfordshire	3
Bedfordshire	1

Section 1: Current Production

1 Which of the following best describes your farming practice?

Mixed	7
-------	---

2 What varieties or breeds do you currently produce?

top three Aberdeen Angus, Hampshire down sheep, solstice wheat, Jerald oats , withered beans, Oil seed rape: Astrid and Castell
Organic beef (mainly Aberdeen Angus, Organic lamb and mutton, pork and bacon pigs (old spot, organic and conventional cereals, organic milk.
Barley – Tipple' malting, Pigs – Canborough 12, Chickens – Isa brown, Turkeys – bronze F.R.
Jersey beef, Jacob / Castlemilch, Moorit sheep. Tammworth / Berkshire Pigs, Vegetables and fruit – too numerous to mention.
Aberdeen AngusX and longhorn beef, Texel X Suffolk sheep, small acreage of veg, Wheat, barley and rape.
Hereward Wheat, Lupins, Asparagus, North Country mule ewe lambs
Water Buffalo

3 What was your turnover for the last financial year?

£0-£250K	4
£251- £750K	
£751 +	3

4. On what soil type do you primarily farm?

Clay	2
Clay loam	1
Loam over chalk	1
All types	1
Cotswold brash grade three	1
Heavy clay	1

Section 2 – Future Production

1. Do you expect to be farming in 10 years time? Yes / No

Yes	4
No	3

If No, will you be using your land for other activities (such as tourism, leisure, property [e.g. Office rental])? Please specify:

- Have a contractor to do the work. Continuing diversification of non farm enterprises e.g. Farm shop and tourism.
- Retiring
- Leisure of some kind.

2. Do you expect to change what you produce in the next 10 years? Yes / No

Yes	3
No	3
Maybe	1

If Yes, what will you be changing to?

- Increase Aberdeen Angus and introduce more traditional breeds such as longhorn to sell in own pub. Thinking of developing walled vegetable garden for use in pub.
- Stopping dairy, starting organic egg production – otherwise who knows!
- Not yet sure.

3. Do you think you will be adopting new environmental or welfare practices (e.g. Seeking organic certification or Freedom Food accreditation) in the next 10 years?

Yes / No

Yes	3
No	4

If Yes, please give details:

LEAF Accreditation (don't require much change to achieve this on top of what we already are doing.	1
Increase organic area on farm (50% at present)	1
If found necessary we will look at them. Currently LEAF.	1
Possibly more organic production. More environment sensitive issues addressed	1

Section 3: Skills for New and Developing Enterprises

1 Will you be seeking new skills in any of the following areas?

Please give as much detail as you can in each relevant box:

	Yes	Possibly
Primary production	2	1
Value added products		5
Business skills: planning, legislation, finance, administration.	1	1
Marketing and promotion	1	4
Market trends and information	1	2
Employment law and recruitment		1
Distribution		1

Primary production

- Biggest constraint on growth lack of primary production skills amongst workers. Farm will be offering placement for apprentice scheme to help address this.
- Potentially for veg production
- Extending horticultural expertise
- Yes- further reduction in contractors costs in cultivation.
- I have done a degree in Agriculture and Food Marketing so any knowledge is a top up. Tend to assess what courses are available and then decide if I need them.

d Value add products

- Adding value via on site food preparation of home produced primary food stuff.
- Possibly – for e.g. we have already explored sausage making and bacon production with success. Ice cream making – another venture.

Business skills

- Seeking managerial skills in retail environment to push ahead with shop expansion.

Marketing and Promotion

- Possibly selling more by mail order.
- Always looking for ways to market our small set- up.
- We already use a co-operative to market our crops.
- Technical skills.
- We need time and money to apply what we know and put what we know into practice. Marketing and production very expensive.
- Always room for improvement especially inter - net.

d Market trends and info

- Trade seminars and workshops vital to keep abreast of changes. Vital for employees to attend too.

Employment law and recruitment

Possibly – we currently use independent human resource co. to deal with personnel issues.

Distribution

Other (please specify)

Section 4: New Markets

	Yes
Local (County wide)	7
London	
European	
Farmers Markets	3
Catering	3
Public sector	1
Regional (SE of England)	2
UK	3
International	1
Direct delivery box scheme	2
Supermarkets	2
Other: Private school catering	1

2 What help if any might you need to gain access to these markets (e.g a facilitator to help match producers to public sector caterers, or representation at national food fairs)?

- A way of distributing / collating produce and storage with a number of producers to access national companies. Shelf life is a problem.

- Believe if you are growing into a new market you have to have the expertise yourself. That is have it and then work on it. Limited faith in a facilitator.

2 Does this help already exist to your knowledge? Yes / No

Yes	4
No	1
No answer	1
Don't know	1

3 If Yes, where is this help available from?

	Yes
Food Group	1
Ethical Food Co	1

4. Do you already belong to your local food group?

Yes	5
No	2

Further points you wish to make

- We want to support other local farms and want to buy produce from them for our pub business however we have a problem getting other farmers to think bigger and produce to the market we are offering. They need to improve their marketability, improve communication, see the bigger picture and become more entrepreneurial.
- We have usually sold into large scale concerns (co-op / supermarkets). Now we are developing our local product angles it is much harder work – smaller businesses buying from us are much more fragile. We have been let down quite a lot, particularly by small shops. We are committed to local outlets but Waitrose can be easier especially from saving time and effort! We need a local co-op!
- BBO food group does a brilliant job collating our data and making details available to people who want to source local food. It might be helpful if some events were nearer to us. I haven't been to any because they are so far away. Our customers need to be 'local' (as in ten miles) as we do all the deliveries ourselves. Maybe more smaller food events rather than a few big ones?
- I find the food group very helpful. Would a food superstore ever happen or work?
- Marketing our asparagus is all local trade.
- In this survey, the farm and its retail operations have been included together.

i **Dairy**

Note: Other milk producers have classified themselves under the 'mixed' farming category.

Total number in this section: 4

Geographical location	
Buckinghamshire	3
Oxfordshire	1
Berkshire	1

Section 1: Current Production

1 Which of the following best describes your farming practice?

Dairy	4
-------	---

2 What varieties or breeds do you currently produce?

British Frisian, Jersey, Montbelliard
Jersey cows
Varied
Goats (Alpine, Toggs, mix)

3 What was your turnover for the last financial year?

£0-£250K	4
£251- £750K	1
£751 +	

4. On what soil type do you primarily farm?

Chalk	1
Clay	1
Clay and stone	1
Oxford Clay	1

Section 2 – Future Production

1. Do you expect to be farming in 10 years time? Yes / No

Yes	4
Yes – but we are also doing tourism and office rental.	
No – we will just make cheese	1

2. Do you expect to change what you produce in the next 10 years? Yes / No

Yes	2
-----	---

No	3
----	---

If Yes, what will you be changing to?

- More meat products
- Have reduced cows from 400 – 250 and are intending to grow more cereals in response to current market forces.

3. Do you think you will be adopting new environmental or welfare practices (e.g. Seeking organic certification or Freedom Food accreditation) in the next 10 years?

Yes / No

Yes	
No	5

Section 3: Skills for New and Developing Enterprises

1 Will you be seeking new skills in any of the following areas?

Please give as much detail as you can in each relevant box:

	yes	Possibly
Primary production	2	
Value added products	2	
Business skills: planning, legislation, finance, administration.		
Marketing and promotion		
Market trends and information		
Employment law and recruitment	1	
Distribution	1	
Other		

Primary production

- More meat products
- Technical advances will be monitored and the main out put will remain milk production the bulk of which goes in Ice cream produced by a separate business on the farm.

d Value add products

- Increase doing goat burgers and goat curry at festivals.

Business skills

Marketing and Promotion

Market trends and info

Employment law and recruitment

- Keeping up to date.

Distribution

- More Internet less Farmers Markets.

Other (please specify)

Section 4: New Markets

	Yes
Local (County wide)	3
London	1
European	
Farmers Markets	2
Catering	2
Public sector	2
Regional (SE of England)	
UK	1
International	1
Direct delivery box scheme	
Supermarkets	
Other: Selling milk to a separate but on-farm ice cream business which is now covering the whole of the UK and internationally.	

2 What help if any might you need to gain access to these markets (e.g a facilitator to help match producers to public sector caterers, or representation at national food fairs)?

- At the moment we are moving slowly into all fields from Farmers markets.
- Publicity and knowledge.

3 Does this help already exist to your knowledge? Yes / No

Yes	3
No	
N/A	1

3 If Yes, where is this help available from?

Food Group	3
Business link	1

4. Do you already belong to your local food group?

Yes	3
No	1

Further points you wish to make

None in this section.

i Cereals

Also included in this category are farms that put themselves in the cereal category but also have cattle and sheep or undertake horticultural production as well.

Note: Other producers of cereal have classified themselves under the 'mixed farming' category.

Total number in this section: 5

Geographical location	
Buckinghamshire	2
Oxfordshire	3

Section 1: Current Production

1 Which of the following best describes your farming practice?

Cereals	2
Cereals with horticulture	2
Cereals with cattle and sheep	1

2 What varieties or breeds do you currently produce?

Barley for Malt: (Westminster, Optic – both spring varieties)) IAS Brown, Borans Goldline
Wheat: (Clare, consort). Oil seed rape: (Kommando), Barley: (Pearl, Optic), Cattle: (Aberdeen Angus and Continental crosses).
Wheat (soisson, Claire, Einstein), Rape (Astrid). Vegetables (all leading varieties as per NIAB).
Cereals: no details. Potatoes: Pentland Javelin, Nicola, Wilja, Charlotte

3 What was your turnover for the last financial year?

£0-£250K	4
£251- £750K	1
£751 +	

4. On what soil type do you primarily farm?

Gravel and clay loams	1
Ironstone	1
Cotswold brash	1
Grade 3 some grade 2	1

Section 2 – Future Production

1. Do you expect to be farming in 10 years time? Yes / No

Yes	4
No	1

If No, will you be using your land for other activities (such as tourism, leisure, property [e.g. Office rental])? Please specify:

Taken on by my children?

2. Do you expect to change what you produce in the next 10 years? Yes / No

Yes	4
No	1

If Yes, what will you be changing to?

- The next designer trend.
- We will be opening a farm shop and so producing more food to sell through the shop. Pigs and sheep – hens and eggs. Possibly some vegetables. Our own jams, cakes, ready meals etc
- Possibly crops for bio -fuel? Possibly table birds.
- We would like to grow what the market needs instead of what we always do – e.g. Biofuels.

3. Do you think you will be adopting new environmental or welfare practices (e.g. Seeking organic certification or Freedom Food accreditation) in the next 10 years? Yes / No

Yes	2
No	2

If Yes, please give details:

LEAF Accreditation	1
We have to on our cereal production. We have just invested in a new grading line to help stop damaging potatoes.	1
NO - De-registered from Freedom foods- a waste of money.	1

Section 3: Skills for New and Developing Enterprises

1 Will you be seeking new skills in any of the following areas?

Please give as much detail as you can in each relevant box:

	Yes	No	Possibly
Primary production	1	3	
Value added products	1	3	
Business skills: planning, legislation, finance, administration.	2	1	1

Marketing and promotion	1	2	1
Market trends and information	1	3	
Employment law and recruitment	1	2	1
Distribution		4	
Other	1		

Comments:

Primary production

Value add products

Would like to market potato salad and chips in the future.

Business skills

- Brought in
- Comes with expansion.
- At some stage I will need to learn to use a computer.

Marketing and Promotion

- Brought in
- Always room for improvement especially Internet.
- Possibly via Business Link.

Market trends and information

- Always trying to keep ahead.

Employment law and recruitment

- Yes – continual
- Not really applicable as family business.

Distribution

- Generally in-house.

d Other (please specify)

- Health and Safety training.

Section 4: New Markets

	Yes	Maybe
Local (County wide)	3	
London		
European		
Farmers Markets	2	
Catering	2	

Public sector		
Regional (SE of England)		
UK		
International		
Direct delivery box scheme	2	
Supermarkets		1
Other:Barley for malt goes mainly to Crisps in East Anglia who are the only Malt store left in the U.K.!	1	

2 What help if any might you need to gain access to these markets (e.g a facilitator to help match producers to public sector caterers, or representation at national food fairs)?

- We may need help developing a website and targeting our advertisements better. Help on how to make people aware of where we are and what we sell.
- Local pubs and restaurants to have knowledge of our products with 5 miles range of Wantage.

3 Does this help already exist to your knowledge? Yes / No

Yes	3
No	
Sometimes	1

4 If Yes, where is this help available from?

Food Group	1
Business link	2
DEFRA	1
SEEDA	1
District Council	1
Own training group	1

5. Do you already belong to your local food group?

Yes	3
No	1

Further points you wish to make

- Environment and sustainability paramount in addressing needs of the industry. Concern over peak oil crisis and greatest help would be support in addressing this.
- BBO food group dos a brilliant job collating our data and making details available to people who want to source local food. It might be helpful if some events were nearer to us. I haven't been to any because they are so far away. Our customers need to be 'local' (as in ten miles) as we do all the deliveries ourselves. Maybe more smaller food events rather than a few big ones?

- Questions assume I have a large farm! In fact I farm my acre's in 100's not thousands.
- We believe the group should have sufficient funding from DEFRA to promote our products without having to subscribe towards it. Maybe a levy based on sales through food group may be an idea.