

Successful COLLABORATION in practice

Yorkshire & Humberside Case Studies

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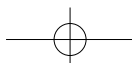


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David Oglethorpe *Associate Director, Economics*

Duncan Rawson *Project Manager, South East*

Paul Rhodes *Project Manager, East Midlands and
Yorkshire & Humberside*

Richard Self *Project Manager, East of England*

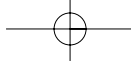
Simon Thelwell *Project Manager, West Midlands*

Stuart Thomson *Associate Director, Food Chain*

June 2005
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Foreword



Paul Rhodes

English Farming and Food Partnerships (EFFP) has been set up to help develop co-operation and collaboration both between farmers and between farmers and the food chain. One of our aims, in order to achieve this, is to see the growth and development of market focused farmer controlled businesses (FCBs) capable of securing value for their farmer members beyond the farm gate, both upstream and downstream. Comparing England with mainland Europe or North America shows that we have a relatively smaller FCB sector and as a result secure fewer of these benefits than our international competitors. However England does have a number of successful FCBs that have achieved considerable growth and benefits to members and some of these are profiled in this book.

One of the main findings of EFFP research suggests that farmers consider collaboration to be increasingly important in the future, but they are not always aware of the opportunities open to them or indeed even the existence and whereabouts of FCBs which could provide valuable services to help their businesses. In response to this, EFFP published in 2004 a book of case studies of English and International FCBs. There has been considerable interest in these resulting in farmers requesting information on FCBs in their more immediate locality. We are therefore pleased to present this set of case studies focusing on FCBs that are based or operate in Yorkshire & Humberside.

In producing these we have attempted to represent as clearly as possible the successes as well as the challenges facing these businesses and, importantly, the views of some of their farmer members. These case studies do not, however, represent a full analysis of each individual business or indeed represent a recommendation on whether or not any individual farmer should join an FCB. These businesses operate in an extremely competitive environment and face considerable challenges in the future. Many have and will continue to change and adapt in response to market pressures but we consider that at the time of writing, this is a fair representation of the FCB sector within the region.

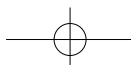
We hope you will find these case studies enjoyable, interesting and informative. We also hope it will stimulate you to consider, if you have not already done so, how being a member of an FCB can help your business.

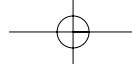
If you would like further information or advice regarding any of the ideas in this book, contact the regional project manager below or head office, details on back cover.

Paul Rhodes
 EFFP Project Manager
 East Midlands and Yorkshire & Humberside
E: prhodes@effp.com
T: 01430 860552
M: 07834 337344



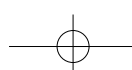
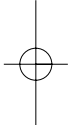
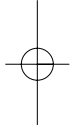
“ EFFP exists to further strengthen the profitability, competitiveness and sustainability of England’s farming, food and related rural industries ”

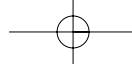




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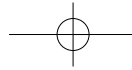
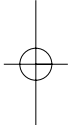
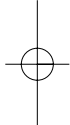


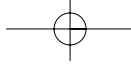


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A PLATFORM FROM WHICH TO GROW AND DEVELOP

Dairy Farmers of Britain (DFoB) has come a long way in a short period of time, developing into the leading farmer owned dairy business in the UK supplying a broad range of product lines to all sectors of the dairy market. The business structure is based on a proven European co-operative model providing excellent member communication, robust corporate governance and a clear strategy for growth and development through investment in the supply chain. DFoB has taken some significant first steps to create a platform from which to grow and develop the business and to install both the confidence of its members and, more importantly, its customers.

The emergence of Dairy Farmers of Britain

DFoB is a broad based UK dairy co-operative owned by its dairy farmer suppliers. The group was established in 2002 by the merger of Zenith Milk and The Milk Group, both of which were also farmer controlled businesses (FCBs). This new business became the leading dairy farmers' co-operative in the UK, marketing around two billion litres of milk per year from 3,250 member farms.

The creation of a new organisation presented the opportunity to develop a structure that could move forward, away from the traditional milk brokering co-operative into one that is able to invest into and realise greater potential from the food chain.

Tim Gibson from Bedale, milking a 130 cow commercial herd, sees this sort of collaboration as vital:



"With the end of the Milk Marketing Board, we were not naive enough to believe that processors would return full margins to farmers. We believe that by co-operatively marketing our milk we will achieve the best return from our produce."

Quickly following the announcement of the merger, DFoB members were asked to show their commitment to the group by signing a Member's Financial Agreement, designed to enable DFoB to substantially increase its borrowing potential.

A series of acquisitions and joint ventures since 2002 has seen the group transform into the UK's largest, farmer owned vertically integrated dairy business, the third largest dairy processor and the number one dairy ingredient manufacturer in the UK.

Today DFoB employs more than 2,600 people across England and Wales and operates 10 dairy processing sites and around 60 product distribution points. Group turnover to the year end 2004 was £436million with a group operating profit of £12.2million.

Strategy and acquisitions

At the end of 2003 DFoB set out a strategy to become the leading farmer controlled business (FCB) over the next 3-5 years, developing into a broad based dairy company processing the bulk of its members' milk. This was driven by the goal to provide a sustainable milk price

Key learning points

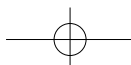
- A clear vision and strategy brings focus to business development.
- Member commitment is long term and fundamental to ensure the financial stability of the co-operative. The correct governance structure plays a significant role in achieving this.
- Building a strong foundation to the business is imperative, but real value will be realised from investment in brands and sustainable markets.

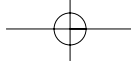
and a profitable platform for growth for its members' own businesses.

Also that year, DFoB entered into a unique three way joint partnership with farmer co-operatives First Milk Ltd and Milk Link Ltd to lease the ex-United Milk plc commodity plant in Westbury. This business operates as a toll-processor, providing access to balancing markets. At the same time DFoB also formed a joint venture company with First Milk to market the products from Westbury.

Another recent joint venture with First Milk has created an independent haulage and distribution company which will handle up to 4.6 billion litres of milk per annum on behalf of the two co-operatives, driving significant cost out of both businesses.

However, the most significant move to date by DFoB, and what is probably the largest deal ever completed by an FCB, is the £75 million acquisition of Associated Co-operative Creameries (ACC) from The Co-operative Group. ACC is a UK dairy operation with a presence in all sectors of the dairy market, servicing major retailers, foodservice outlets, food manufacturers and the catering trade. ACC process and package almost one billion litres of milk a year across the whole range of dairy products. Its product portfolio makes ACC one of the most versatile dairy operations in the UK.





Commenting on the acquisition, Malcolm Smith, former CEO of DFoB said:

“With this acquisition, DFoB take a massive step forwards in fulfilling our long-term strategic aim.”

The acquisition of ACC lifted the product range of the DFoB business to over 600 different lines with strong brands such as Dairygate, Somerset Brie, Capricorn Goat’s Cheese, Cadog and Yorkshire Milk. But these are just the start: the group is committed to developing these and new brands into the future.

A farmer owned business

DFoB operate across England and Wales and has around 3,250 members. Members are dairy farmers who supply the co-operative with milk and vote in the election of farmer representatives for the member Council, which elects the board. The board and executive are 100% accountable to the members.

Nigel Watson, of TM Watson & Sons, North Frodingham, Driffield, who milks 130 cows, recognises the benefit to his membership:

“The key benefit of being part of DFoB is the ability to control our own destiny by taking control beyond the farm gate and investing in milk processing. Investing one penny per litre for the next 10 years is a risk worth taking due to the rewards that should be gained.”

DFoB is committed to the principles of corporate governance and this is reflected in the way the board operates in conjunction with its committees and in its open communication with members...
 “Our governance structure has been



developed to offer real member involvement and control.” From the outset, members had the foresight to realise that if the group is to succeed in its objective, then it must have the right calibre of directors and executive team to drive the strategy forward. Since 2002 DFoB has undergone a significant restructuring of both the board and executive team.

These principles of open governance has allowed DFoB to develop the financial structure and commitment from its members to contribute capital in an open, honest and transparent way which has enabled the rapid growth of the business.

Building a better future

Since its beginning in 2002, DFoB has been extremely busy and has achieved a great

deal. The business has developed a clear strategic direction and the company has re-structured at all levels to allow it to take on the challenges ahead in the most efficient way possible. Most importantly, it has made significant investments in the supply chain.

But it is keen to emphasise that these are the first steps of many.

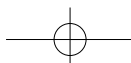
“The next year will be both exciting and challenging. What we are undertaking is ambitious and to achieve our goals we must work together, strive for improvement and operate to the very highest standards...being a pre-eminent farmer controlled business has enormous value, but we have to earn the right to do business, connect the supply chain and provide the industry with solutions not problems .”

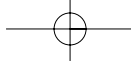
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Nigel Watson, of TM Watson & Sons, North Frodingham, Driffield

CONTACT DETAILS

Dairy Farmers of Britain Ltd
Alpha Building
London Road
Stapeley
Nantwich
Cheshire CW5 7JW
Tel: 08700 108191
Fax: 08700 108188
Website: www.dfob.co.uk





ADAPTING THROUGH DIVERSITY

Founded in 1964 as a traditional agricultural supply co-operative, Farmway has had the foresight to adapt and diversify its business to cope with the challenges faced by the farming sector. Through joint ventures with other businesses and through acquisition, Farmway has developed its retail outlets and business to be relevant to a wider rural market. Further collaboration through carefully planned but diverse investments, whilst maintaining a core supply business, is central to its future strategy.

Adapting to change

Farmway is an agricultural supply co-operative formed in 1964 from the amalgamation of three former co-ops in the North East. Its traditional business is production and sale of compound animal feeds, dressing of cereal seed and the supply of fertiliser and other agricultural requisites to its 2500 members and other customers.

The challenge Farmway has faced has been to adapt to the changing rural economy whilst retaining a high quality and wide ranging service to a declining number of farms and farmer customers. This has been achieved by developing its local outlets into retail country stores, offering not only products required by farmers but also marketing a range of goods to the surrounding population.

In addition, it has identified other opportunities to improve services to members. These include a joint venture business with a feed company to produce high quality animal feeds and a grain

company to market members' grain, as well as the acquisition of two regional animal health businesses. This has enhanced the range of products and services available, positioning Farmway as a one stop shop for its members.

Clear challenges for the future will arise from CAP reform in the north east, possibly reducing the number and activity of farmers. As a consequence, Farmway needs to continue to grow, both geographically and in the range of products and services it offers, and will look to extend its successful joint ventures as further opportunities arise.

Developing services

Traditionally, Farmway has relied on sales of inputs (seed, fertiliser, feed, agrochemicals) and other products direct to farmers. Over recent years the effects of competition, reducing margins and the reduction in the number of farm businesses have required Farmway to look at every aspect of its business to ensure that it is profitable and supplies its 2,500

Key learning points

- Joint ventures and acquisitions enhance service to members and customers and ensure focus on new activity.
- Diversifying retail outlets helps adapt to a declining agricultural economy and appeal to a wider population.
- To meet future challenges, businesses need to provide the right products at the right time together with excellent service.

members and other customers with exactly what they require. Turnover has, however, continued to grow and (excluding the grain business) rose to £28m in 2004. Despite the many issues facing Farmway, the continued development of the products and services offered to its members remains core to the future development of the company.

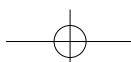
GrainCo

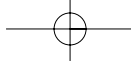
By forming a joint venture with Tynegrain, another co-operative grain storage business, Farmway was able to provide its members with access to a highly professional grain marketing operation. This further expanded in 2002 with the acquisition of United Cereals of Scotland and GrainCo now markets in excess of 1m tonnes of grain. GrainCo is jointly financed by Farmway and Tynegrain and provides an outlet for both their members' grain. They generated one of the highest pool prices for members in 2003 and 2004.

In establishing this arrangement, Farmway recognised its members required an ever increasing professional marketing service and, by entering into a joint venture, it was able to provide this in the most cost effective manner.

Feed Co

The demands on feed manufacturing businesses for quality and traceability are such that when Farmway was faced with the need to update its existing facilities, it





had to ensure that the £2m investment would be cost effective. By entering into a joint venture with Lloyds Animal Feeds, it was able to use its expertise in feed manufacture coupled with a greater throughput of the plant. The joint venture company is purely concerned with the manufacture of animal feed and Farmway retain and support its own customer base.

Animal health

The acquisition of Hallshaw Farm Supplies in 2003 and Yorkshire Animal Health in 2004 has created a division which, combined with Farmway's existing animal health sales, produces an annual turnover of £4m. By acquiring these businesses with their existing management, it enabled Farmway to bring in expertise to re-invigorate its own animal health business and provide a wider customer base. It has enabled Farmway to offer all its customers an improved level of service at competitive prices.

Farmway Country Stores

Considerable emphasis has been placed on the nine retail outlets recently re-branded as Farmway Country Stores. A modernisation programme for the stores is ongoing including rebuilding and relocation to offer an attractive and customer friendly environment. The aim is to attract higher margin business from the wider rural population, including a lifestyle



product mix. The challenge is to make these stores appeal to the wider population while ensuring that farmer members continue to be serviced to the highest standard.

Peter Hull, chief executive said:

"Farmway faces many challenges, but the increased level of turnover shows we are able to attract new customers to the Country Stores whose interests reflect the changes in the countryside, while retaining our core farmer members. We have focused on being able to supply the right product in the right quantities at competitive prices and have worked hard to ensure we eliminate

redundant stock lines. Our new IT system will produce additional management information from all our stores to ensure we have an efficient stock control system. Our retail business is a profit centre and is currently performing to expectations and complements our other services."

The future

The directors of Farmway appreciate the future will hold many challenges. Outlining future strategy, John Hutchinson, Farmway chairman explained:

"We have a three-pronged strategy: firstly we will continue to look at opportunities to develop and expand the business but all investments will be carefully assessed against potential returns. Secondly, where we can gain from working with other businesses we will do so, such as in our successful joint venture activities. Finally, we intend to continue to develop our core business by providing a viable and secure future for our members."

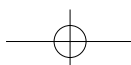
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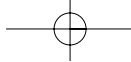
John Hutchinson, Farmway chairman

CONTACT DETAILS

Farmway Ltd
 Cock Lane, Piercebridge
 Co Durham DL2 3TJ
 Tel: 01325 504600
 Website: www.farmway.co.uk

GrainCo Ltd
 Tyne Dock, South Shields
 Tyne & Wear NE34 9PL
 Tel: 0191 4287700 Fax: 0191 4285202





A CLOSE WORKING RELATIONSHIP PAYS DIVIDENDS

For many of the 39 members of Howdenshire Growers, vining peas are one of the most profitable crops they grow. This is the result of a combination of factors, from having an ideal climate for the crop, good land and being professional growers. Possibly, however, the key factor is the close working relationship that has been developed over the years with its single customer, Birds Eye.

Unilever has spent millions on promoting the Birds Eye brand and, because of this, Birds Eye frozen peas are able to attract a 30% price premium from the consumer relative to own label peas. The members of Howdenshire Growers have benefited from this premium and, for their part, have met the tight quality specifications required by Unilever in order to protect their brand image. Through working closely with its customer, Howdenshire Growers has been able to make good returns to its grower members for the past 30 years.

Howdenshire Growers was formed to provide its only customer, Birds Eye, with vining peas. The group was able to buy the specialist equipment necessary to grow the crop making it economically viable for producers. The company is a registered Producer Organisation under the EU Fruit and Vegetable Regime and has a five year operational plan through which it receives grant aid to help with capital costs, key staff and quality assurance.

The company was set up formally in 1974 as an Industrial and Provident Society and organises the growing and marketing of peas for its members who, between them, farm 24,500 acres within 15 miles of Howden. The group grow just over 3,000 acres of vining peas, producing about 7,000 tonnes in an average year. The co-op owns the drilling and harvesting equipment and pays its members a return based on individual performance.

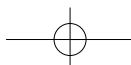
All the peas are bought by Birds Eye and delivered to their freezing plant in Hull. All the crops are sown, grown and harvested in order to optimise yields and quality to a production plan drawn up by the Birds Eye fieldsman, Tim Clappison. This plan is in accordance with all the relevant Unilever protocols such as the Commitment to Quality document.

John Sweeting, of L Sweeting and Sons, Hall Farm, Cotnes, Goole, farms 2,400 acres of mostly arable land. Vining peas are grown as part of his rotation with

Key learning points

- The group has the economies of scale to meet its single customer's needs.
- By working together they have been able to share the capital costs of specialist machinery and reduce growing costs.
- The accumulation and sharing of local knowledge is of great benefit to producers.

wheat, oilseed rape and sugar beet. John also grows potatoes on his more fertile land for packing. His family business originally joined the group in 1974 in order to have access to the customer, Birds Eye. At that time they were also growing sprouts, broad beans and calabrese for Birds Eye. Through the group they were able to buy three viners and gain access to the other support equipment necessary to drill, harvest and deliver peas to the Birds Eye factory. This would have been too large a capital investment for a single producer at the time. The key benefit John's business receives is access to the Birds Eye contract, having the scale of production and the grant aid available through the group to be able to grow vining peas economically. John believes that Howdenshire Growers has done a good job for him over the past 30 years.





The Forum for Sustainable Farming

Maintaining the premium the Birds Eye brand commands is a constant battle and, to this end, Birds Eye and its producer groups have launched the Forum for Sustainable Farming. Through this initiative Birds Eye are looking to increase brand loyalty by strengthening its environmental credentials. Via the Forum, Howdenshire Growers is hoping to get closer to its customer's needs and help Birds Eye to closer match its own customers' needs.

The goal of the Forum is to ensure that the best peas can be grown for the next 50 years and beyond without damaging the environment. Practices such as encouraging ground nesting birds and creating flower rich margins around the edge of the fields ensure that the pea crops are alive with wildlife whilst soil and water habitats are protected. The group has part funded this initiative through a successful Vocational Training Scheme application through DEFRA's Regional Development Service. The training is being facilitated by the Farming and Wildlife Advisory Group and is intended to train members to grow in a more environmentally friendly way.

The members of the company are also looking to use the unique selling point created by the Forum to differentiate and add value to the other crops they grow. Howdenshire Growers has a track record



of being able to produce to high production, quality, and environmental standards; in the future it will look to build on this to meet the needs of discerning customers.

Andrew Wraith is a partner in the 950 acre mostly arable family farm at Portington near Howden. The family business, B S and A Wraith, has been a member of the group since the formation of Howdenshire Growers. Andrew says:

"The initial reason for joining was to give [us] access to the Birds Eye customer and to be able to grow vining peas without having to buy, as an individual business, the specialist equipment necessary to grow the crop."

Andrew added:

"There will be opportunities for farming in the future following CAP reform but those opportunities may only be available to those farmers prepared to act collaboratively."

The future

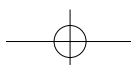
Howdenshire Growers will look to continue its close working relationship with Birds Eye and maintain the consistent traceable quality that it would struggle to find anywhere else. Through the Forum for Sustainable Farming, it will work closely with Birds Eye to strengthen its environmental credentials to maintain brand loyalty. Over 30 years of successful trading has built up an enormous amount of trust between the members and the group. Going forward, it would like to use this valuable commodity, trust, to the mutual benefit of all and find ways to gain a premium for its produce and further reduce farm costs.

"Access to the customer and specialist equipment remain the key benefits of membership, but hopefully there will be others in the future as the group looks to capitalise on their strengths and maximise benefits to members in either buying or selling activities. This may take time, but it is important to have a medium to long term strategy, particularly if there are real benefits to be had."

Andrew Wraith, Portington, Nr Howden

CONTACT DETAILS

Howdenshire Growers Ltd
Warwick House
Howden
Goole DN14 7XD
Tel: 01430 410223





Renewable Energy Growers Ltd

POWER TO THE FARMERS

Renewable Energy Growers Ltd (REG) was formed in 2002 to improve returns for growers of willow and short rotation coppice (SRC). The loss of its only customer was an initial blow, but it has recently been successful in developing new customers within the power industry. It is a registered producer group under the Energy Crop Scheme and has been able to attract grant aid for harvesting equipment, marketing, research and development and key staff. The company is now looking to grow increased volumes and find added-value markets. REG believe that, with CAP reform, growing SRC will be an excellent alternative to other crops. The market is not yet totally developed but the board of REG is keen to make sure that farmers are driving this process and are going to capture the value from growing this new energy crop.

There is a growing market for renewable energy driven by policy targets on greenhouse gas emissions, our dependency on fossil fuels and the social pressures to develop more sustainable environmentally friendly energy sources. International political pressure to reduce global warming has resulted in the Kyoto Agreement, which committed the UK Government to renewable energy targets.

Whereas the production of biodiesel and bioethanol requires taxation changes to make it sustainable, the framework is already in place to profit from power generation from renewable energy crops such as SRC. This is through power generators receiving a premium from Renewable Obligation Certificates (ROCs) for power generated from renewable sources.

The market is not yet totally developed but the board of REG is keen to make sure that



farmers are driving this process and are going to capture the value from growing this new energy crop. REG strongly believes that as much margin as possible should go back to the grower members.

The company was formed in 2002 to bring growers of SRC together to negotiate with its single customer, ARBRE, in a more cohesive way and to help improve production. Shortly after REG was formed ARBRE went into liquidation leaving the growers without a customer. However, the company has recently been successful in developing new customers within the power industry. It is also actively looking for other customers and added value opportunities for its product.

Gareth Gaunt, of Carlshead Farms, near Wetherby, North Yorkshire, grows 150 acres of SRC on his 500 acre farm. Gareth was a founder member of REG and the main benefit to him from the group is the access to large customers for his produce. Gareth outlined:

“REG is a registered Producer Group under the Energy Crop Scheme, which substantially reduces my capital costs needed to grow and sell SRC. We have a three year operational plan from which we have received £200,000 worth of grant aid for the harvester, agronomy advice, research and development, promotion and some salaries.”

The group has 45 members, all of whom grow SRC. Most of its crop is now reaching maturity and will be harvested shortly,

Key learning points

- In order to capture a margin from energy crops, farmers need to get as close to the end user as possible.
- In a post CAP reform world, growing SRC will be a profitable alternative to arable crops.
- Only by working as a group can farmers supply the volumes needed by large customers.

within south and east Yorkshire, Nottinghamshire and north Lincolnshire.

With single farm payments (SFPs) coming, Tony Holmes, the CEO of REG, is confident that growing SRC is a viable proposition for some farmers in the region. This is particularly true for farmers on marginal arable land who may find it unprofitable to grow commodity arable crops at unsupported prices. REG is hoping that the deals it is negotiating with the power industry should enable farmers to get at least £20/oven dried tonne of SRC back after harvesting, haulage and marketing costs.

The average crop produces four oven dried tonnes of wood per acre per year. So producers could receive their SFP and receive over £80/acre from their SRC. There is also a £1000/ha available from the Government to contribute to the cost of establishing the SRC.

SRC responds well to slurry and manure, so farmers who have intensive livestock with slurry to dispose of, or human sewage contracts in place, could grow a very good crop of SRC in an environmentally friendly and cost effective way.

It is highly likely there will be further Government intervention to make renewable energy crops more lucrative to end users and, therefore, to farmers due to the need to meet renewable energy targets.



Russell Toothill, of Ivy House Farm, Doncaster, grows 280 acres of SRC on his 820 acre farm. He also grows sugar beet, oilseed rape and cereals on the free draining sandy soils as well as having 750 breeding ewes. The SRC is grown on his poorer land, half of which is restored gravel pits the other half being grade 3 sand and gravel. The SRC is an integral part of the Countryside Stewardship Scheme Russell manages on the farm. He says:

“Being a member of REG means I do not have to have specialist machinery and I have been able to reduce staff and machinery costs across the whole of my farm business... The group provide access to large

customers but also provides security of supply to small customers.”

The future

As well as its core business supplying the power industry, REG would like to be able to process its crop further and add value to it and move away from the commodity energy market. With this in mind it is also looking to develop closer links with the emerging market for wood burning boilers for schools and hospitals or new private building developments. The crop is bulky and, to be economic, needs to be grown within 20 miles of where it is to be used. To that end it is also exploring the

possibilities of wood burning micro-power stations which could be built on farm.

In order for REG to build on its success it needs more growers of SRC to meet its large customers’ needs. This will require a long term commitment from growers; however, the changes to the support system to farming may make SRC an attractive crop to many farmers in the future.

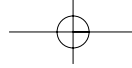
*“Without the willow and the Stewardship we would have lost money growing very average cereal crops. We have also become very popular with the local community for enhancing the environment and helping wildlife in the area. The footpath through the willow is much appreciated by the local people and, as part of the Stewardship scheme, earns my farm £500 a year.”*Russell Toothill.

“ Being a member of REG means I do not have to have specialist machinery and I have been able to reduce staff and machinery costs across the whole of my farm business... The group provide access to large customers but also provide security of supply to small customers. ”

Russell Toothill, of Ivy House Farm, Doncaster

CONTACT DETAILS

Renewable Energy Growers Ltd
Unit 2, The Stables
Manor Business Park
East Drayton
Retford DN22 0LG
Tel: 01777 248010
Fax: 01777 248015
Website: www.energycrop.co.uk



BENEFITING FROM CHANGE

Ridings Machinery Ring (RMR) was set up in 1990 to help and improve the efficiency and profitability of farmers in the region, by the sharing of equipment and labour. The group has grown to 270 members and operates between the Humber and the Tees and from the east coast to the Lancashire border in the west. It has added to the services it offers members and now supplies commodities such as fuel, LPG, electricity, tyres, wearing parts, hay and straw. Farmers, contractors or commodity suppliers pay an annual subscription to be members. RMR act purely as an intermediary and take a small levy from the supplier of the goods or service and from the demander. It believes the changes to the CAP will increase the need for its services since farmers will need to be more cost conscious and more flexible in how they operate. RMR believes that it can provide them with the service they will need in the future.

Key learning points

- Machinery rings can even out peaks and troughs in labour and machinery and save farmers money.
- The ring can reduce on-farm capital investment.
- Change is coming: farmers should look at how they operate and consider using rings for some of those activities.

Peter Day, CEO of RMR, sees CAP reform as an opportunity to increase business, given the anticipated change at the farm level. When more exposed to the market, farmers will look at their businesses more critically, in particular what they grow, how they grow it, what their costs are and how they might do things differently.

If farmers are unsure of what they are going to grow, they are unlikely to invest

in new machinery and will look to use a ring instead. Alternatively, they may have redundant equipment or surplus labour that they can hire out through the ring. Farmers will need to be more flexible in how they operate post CAP reform, and the ring can be an important tool in achieving this and reducing costs.

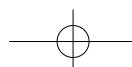
RMR was formed in 1990 as a result of an initiative by the York Farmers Training

Group, which involved seven other training groups to help them get the critical mass and regional coverage needed to be a successful ring. The aim of RMR was to make farmers more efficient by sharing equipment and labour. Now, the group still focuses on the same aims but has increased the number of services offered to members to help improve the profitability of their businesses.

The group provide three main services for its members: a machinery ring; a labour ring; and the purchase and sale of inputs (for example, fuel, straw, electricity and tyres). Labour is also provided to non-members through RMR Rural Services, a wholly owned subsidiary.

RMR has grown to 270 members with a turnover of £600,000 and operates within the area between the Humber and the Tees and across to Lancashire.

Malcolm Thompson, a partner in M Thompson & Son at Home Farm, Slengingford Park, North Stainley, has been a member of RMR since 1996. They are tenant farmers on a 340 acre mixed farm, with 700 ewes as well as potatoes and other arable crops. They use RMR for an increasing range of services - ploughing, drilling, baling and also helping to lift their potatoes. They use the contracting business of fellow ring member John Fletcher exclusively for these jobs. In addition, Malcolm also acts as a supplier to RMR by contracting out the services of his





employee to drive a baler for John for the harvest period. Malcolm likes using the ring because:

“it saves me needing to invest in machinery that will not be fully utilised, and I am able to hire out any surplus labour.”

He also enjoys dealing with Peter Day at RMR who:

“is a great fountain of knowledge, understands his business and is prepared to go the extra distance to help.”

John Fletcher, who also purchases his fuel through the ring, benefits from the regular business that RMR provides, the labour the ring makes available at peak times and improved cashflow due to the 21/28 day payment terms operated.

A successful operating formula

Each member holds a £50 share and pays an annual subscription of £125 for full farmer membership; £30 a year for self-employed labour providers; and £150 a year for commodity suppliers. Some members pay the subscription but make little use of the services, taking the view that it is there for an emergency and acts as an insurance policy.

When they join, members list the machinery they have available to hire. Generally the equipment is hired “complete with operator”, which is often preferable as the machine owner’s staff retains responsibility for the machine and the hirer or demander benefits from the services of an extra man. The price for the work is agreed between the demander and the supplier, and these details are sent

“ it saves me needing to invest in machinery that will not be fully utilised, and I am able to hire out any surplus labour. ”

Malcolm Thompson, M Thompson & Son, Home Farm, Slengingford Park, North Stainley,



to RMR on a work sheet. RMR then invoices the demander for the work, including a 3% levy, and will pay the supplier after deducting the levy.

All the transactions are done by direct debit and direct credit. RMR acts as an intermediary, with the respective liabilities and risks remaining with the demander and the supplier.

Robin Richardson is a partner in Richardson & Son, Eldmire Hill, Dalton, Thirsk, and has been a member since 2003. He has an arable farm with 22,000 organic and conventional free range laying hens. He started using RMR to help strip, clean and wash out his poultry sheds, a job which other contractors had let him down with in the past. The help he receives from the ring, Robin says, “has transformed the job”. He also uses relief labour from RMR to assist with egg grading and packing.

Robin is a big advocate of RMR. When he was unable to work due to illness, the ring quickly came to his help. Peter Day enlisted John Fletcher who was able to undertake the ploughing and drilling needed promptly and at a fair price. Robin still uses John’s services regularly as the poultry takes up much of his time. Robin finds the ring:

“very reliable, with efficient administration saving me inconvenience and time.”

Future strategy

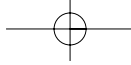
The future strategy is to assist members in meeting the requirements of cross compliance and to continue to develop the

core business, in particular the labour aspect as good skilled labour is in increasingly short supply. It is keen to increase both its membership and the usage of services on offer by existing members. This will help it to deliver an improved and more comprehensive service. It hopes that farmers will understand the benefits of using RMR and that, when members are planning changes to their farm businesses, they will incorporate the use of the ring into their future plans, as it can offer clear cost benefits.

“The success experienced in the core areas of machinery and labour has focused attention on other areas that lend themselves to co-operation. The movement of straw between members from arable lowland to livestock upland, and reversing the flow for winter keep of both cattle and sheep, are prime examples of ways that the ring is evolving to help members in these changing times.” Quote from company website.

CONTACT DETAILS

RMR Ltd
66 Long Street
Thirsk
North Yorkshire YO7 1AU
Tel: 01845 523496
Fax: 01845 525728
Website: www.ridingsmachineryring.co.uk



GUARANTEED SUPPLY OF QUALITY ASSURED PRODUCT BRINGS STABILITY

Snaith Salad Growers Ltd was formed in 1983 to market the salad crops produced by local growers who were members of the former Land Settlement Association (LSA) at Snaith. Since then it has expanded and taken in growers from other parts of the country. Snaith Salad Growers offers a complete marketing service to its members. The company supply four retailer customers and a local processor. The produce is delivered by the growers to the pack house to meet order requirements. There it is cooled and packed and distributed to the customers. For this service the producers are charged a transparent marketing fee and receive a weekly pooled price for their product.

By facilitating a close working relationship between its grower members and its supermarket customers, Snaith Salad Growers has delivered real benefit to the chain. It provides its customers with a guaranteed supply of consistent quality assured produce that its customers are unlikely to be able to get from elsewhere. This has brought stability to a market which, historically, was highly volatile. The grower members are all full time committed professionals who understand the demands of supplying a discerning customer. They have all made substantial investment in their businesses and in Snaith Salad Growers to enable it to

compete effectively and supply major retail customers.

Structure and operation

The company was formed as an Industrial and Provident Society co-operative in 1983 by growers who were former members of the LSA site near Snaith. (The LSA had been set up following World War I to find work for unemployed miners.) Since then Snaith Salad Growers has grown and taken on grower members from other areas.

The growers pay the co-op a transparent marketing and management fee to pack

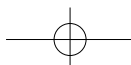
Key learning points

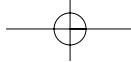
- Working together provides access to large customers.
- Consistent quality secures market for produce.
- Changing customer demands require focus on new products.
- Guaranteed supply of quality assured product brings stability.

and market their crop. They receive a weekly pooled price for their produce, which is delivered to the company-owned packhouse where it is cooled and packed and transported in company vehicles to the retail customers.

Ray Blackburn of West Holme Salads, a family business with five acres of glass, grows lettuce and celery for Snaith Salad Growers. Ray explained that dealing with Snaith Salad Growers was “*the only way a small grower could supply a large customer*”. The key benefit for his business is the contracts that Snaith Salad Growers has with the major retailers. However, there are additional benefits through dealing with the group in terms of being able to supply produce for the entire year to its customers and to even out supply between other member growers to closer meet customers’ requirements. Ray also highlighted the benefit that his business receives from the group buying of packaging and of transport.

Snaith Salad Growers mostly sells lettuce of varying varieties, and some celery which is grown under glass in spring and outside in summer. The majority (95%) of the lettuce is packed and sold direct to the supermarket customers, ASDA, Morrisons, Somerfield and Budgens. A small amount goes to Yorkshire Fresh Salads at Drax, which is owned by Geest, where it is processed and bagged.





The company also has a wholly owned subsidiary called County Salad Growers, which deals with non-members at home and abroad and which enables Snaith Salad Growers to supply its supermarket customers all year round. The company expect to have a turnover of £4.5m in 2005.

Information and development are key

Snaith Salad Growers is a registered producer organisation, which gives it access to grant aid funding under the EU Fruit and Vegetable Regime for quality control, agronomists, product developments and environmental improvements. It is also a member of the British Leafy Salad Association from whom it receives technical and market information.

Ian Clough is a member based on the old LSA Site at Snaith. He was one of the founder members of the group following the closure of the association. The main benefit to his business is the access he has through the group to the major retailers. He is pleased that the company has been able to adapt to the changing market for salad crops which has enabled it to remain successful when others have failed. Ian says:

“Without the help of the group I would be spread too thinly to successfully run my business. With the group doing the marketing and the transport, I can concentrate on growing the produce.”

“ In a highly competitive market it is important to have the best available information to work on to allow you to make the best possible business decisions. ”

Simon Dieghton, CEO.



The company has 27 members who sell virtually all their produce through it. Most of the production is under grower programmes and organised on an annual basis. However, since some producers over supply and others under supply, the company is able to balance things to meet its customers’ needs.

The company aims to make a small profit and last year it paid out £50,000 in bonuses to members, although it also looks to retain some reserves to cover any contingencies that might arise.

There has recently been some stability in the market brought about by the need for a guaranteed supply of quality assured product. Snaith Salad Growers has a two tier price system with its customers, which involves having a spring and summer price and an autumn and winter price.

Quality assurance

Snaith Salad Growers take quality assurance and environmental compliance very seriously. To ensure it meets the very high quality standards demanded by its customers and UK legislation for Food Safety (Food Act/pesticide Regulations), together with various environmentally sound practices (Groundwater Regulations/disposal of pesticide containers), it is audited by independent auditors. It also holds the EFSIS Higher Level Approval certificate for its packhouse operation (including HACCP) and all growers are members of the Assured Produce Scheme.

It is also continually trying to reduce pesticide usage and work closely with

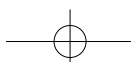
researchers at Horticulture Research International to train staff in pest/disease identification and monitoring, together with specific research programmes to establish growing techniques which use other methods of pest/disease control. It monitors all crops twice a year for a wide range of pesticide residues and the results are available for inspection. To ensure it complies with EU legislation on the nitrate content of lettuce, it also grows crops to the standard required for Good Agricultural Practice of nitrate fertilisation.

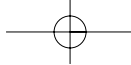
The future

Snaith Salad Growers would like to grow its business with Morrisons, particularly with respect to curly lettuce, and are looking to grow new varieties to meet changing consumer demands such as cos and little gem lettuce. On the horizon, Simon Dieghton is aware of greater overseas competition putting pressure on margins, particularly from eastern Europe. The more immediate threat to the business and the grower members is further rises in fuel prices which, if not handed on to the customer, could seriously damage the profitability of the company and the growers.

CONTACT DETAILS

Snaith Salad Growers Ltd
West Bank, Carlton
Goole
East Yorkshire DN14 9PZ
Tel: 01405 860354
Fax: 01405 860502





CELLULAR GROWTH GIVES BEST OF BOTH WORLDS

Woldmarsh Producers Limited was founded in 1961 by farmers who believed they were paying too much for their inputs. By aggregating their input demand and employing professional buyers, they have not only managed to significantly reduce their input costs but have saved time in the buying process and administration. The real benefits achieved has resulted in a business turning over £46m with over 600 members. This growth has been helped by its cellular structure which has enabled Woldmarsh to negotiate prices through the central buying team, whilst maintaining a good local focus and good communication with members via these local groups. The financial security of the group has been maintained by having direct debits in place for all purchases and the members of each of the local groups being jointly and severally liable for debts within that group.

Key learning points

- Professional central buying team with close supplier relationships reduces input costs to farmer members.
- Cellular structure (regional groups) maintains a local focus.
- Direct debits in place for all purchases maintain financial security of the group.
- Simple business but attention to detail and a constant desire to improve their service.

From its foundation in 1961 Woldmarsh has grown significantly via amalgamation and new recruitment to 620 members. It has a turnover of over £46m.

The local group structure of the company has enabled it to maintain a local focus and good communication with members. At the same time, it can lever large scale buying power through its central office.

The company is made up of 19 regional groups or cells with all members dealing with the central office in Louth. Through the group they can buy a huge range of products and services from fuel and electricity to agro-chemicals and fertilisers.

Members receive one monthly statement outlining their purchases. Payment is taken by direct debit on the 20th of the month and suppliers are paid at the same time. This very tight control of payments means Woldmarsh has minimal worries over bad debts from its members.

Paul Haskins, of Quarryside Farm Ltd, Skidby, in East Yorkshire, has been a member for four years. He farms 900 acres of mostly arable land growing cereals, peas and potatoes. He also has a suckler beef herd which graze on some of their poorer land. Paul said:

"[We] joined Woldmarsh because it promised to reduce input costs and it did... not only did it reduce costs, the service it offers reduced the time spent buying inputs and the associated administration."

Richard Longthorp, of LKL Farming Ltd based near Howden, farms a large arable acreage and keeps outdoor pigs. Since joining, he has developed a huge amount of

confidence in Woldmarsh, based on an excellent track record. Richard says:

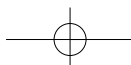
"It makes my life a lot easier. I order what I need from them and it comes at the right price. They regularly come up with new lines which we test them on and so far have not been disappointed."

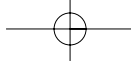
The company is an Industrial and Provident Society and acts as principal, processing 130,000 invoices in a year. It employs nine people, five of which are involved in negotiation and procurement. Over the years, Woldmarsh has developed strong relationships with distributors and suppliers based on trust, prompt guaranteed payment and confidentiality.

Group buying saves time and money

Its members are very loyal and buy as much as 95% of requisites (£88/acre) through Woldmarsh. This loyalty is based firstly on the prices negotiated by the company but also on the level of service offered. This service saves members considerable time and effort.

To get the best out of Woldmarsh, members are asked to forecast their needs over a season particularly with commodities such as fertiliser, of which the group buys over 100,000tns a year. These orders help strengthen its negotiating





position. With agrochemicals, orders placed before 6pm will be delivered the next day. The good commitment of the members helps negotiation.

Nick Baker, of Bainton Heights Farm, Bainton, Driffield, farms 1,000 acres as a contract farming company with his neighbour Richard Beechill. They buy all their inputs through Woldmarsh, from fertiliser to phones, agrochemicals, electricity and fuel. Nick explains:

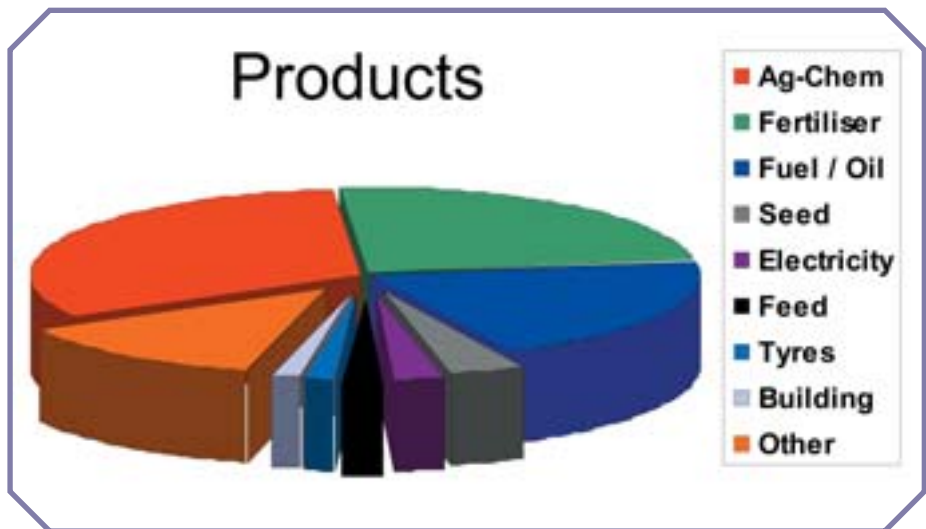
“We do not have an abundance of staff these days and one phone call to Woldmarsh saves me a lot of phoning around. We do our own agronomy and leave it up to the group to source all the chemicals and we are happy the products will turn up at the right time at the right price.”

Nick describes their paperwork as “outstanding” and says that he possibly saves half a persons’ time and cost a week in office work and buying. When Nick joined he believed he would save money but he would not get as good a service from suppliers. However, this has not been his experience. He says:

“If I want something in a hurry, it gets here fast. I guess suppliers do not want to fall out with such a big customer and they are guaranteed their money.”

Conscious of cost

The company is keen not to do things the members cannot see and can’t value. Its very low cost structure has enabled Woldmarsh to cover costs with a charge which, on average, equates to just 0.63%



of turnover. The percentage a member pays is on a sliding scale based on turnover, with small turnover businesses paying 2.5% and larger businesses paying only 0.3%. The company regularly benchmarks prices with other new members, other groups and other co-operatives in Europe.

It is also very vigorous in its cost control even when it comes to its own administration and the way it runs its business.

The future

Steven Jagger, CEO believes that CAP reform will act as a catalyst for change and farmers will look to operate differently. The total amount of cropping may not change but the people actually making the decisions will be much reduced. These professional farmers are more likely to use

Woldmarsh due to time constraints and being more aware of the benefits of using the company.

The market place is constantly changing with fewer larger suppliers; this will be further accelerated by the impact of CAP reform. In order to meet this challenge, Woldmarsh is aware that it needs to move forward with more members and more cells being added to constantly maintain and improve its negotiating strength and spread costs. The structure allows them to easily incorporate other farmer groups; these smaller groups include a social element, are more manageable and allow trust to develop more easily. New groups need to have a minimum of 10,000 acres represented. Networking with existing farmer groups or co-operatives may prove fertile territory for expansion. The company will look to continue to work closely in partnership with its suppliers to the mutual benefit of all.

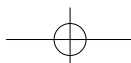
“We are a simple business, but there is a huge amount of detail which needs to be right.” Steven Jagger, CEO.

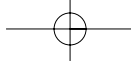
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Nick Baker, Bainton Heights Farm, Bainton, Driffield

CONTACT DETAILS

Woldmarsh Producers Ltd
Cannon Street House
Cannon Street
Louth
Lincolnshire LN11 9LL
Tel: 01507 602396
Fax: 01507 602714
Website: www.woldmarsh.co.uk





Yorkshire Farmers Livestock Marketing Ltd

A TOTAL FOOD CHAIN SOLUTION FOR LIVESTOCK FARMERS

Yorkshire Farmers Livestock Marketing Ltd. (Yorkshire Farmers) was formed as an Industrial and Provident Society in 1932 by pig producers looking to secure a better market for their animals. The company is based at Malton in North Yorkshire but has members over much of the east side of England. It markets pigs, cattle and sheep to a range of abattoirs in a professional manner, with all payments being backed by credit insurance. It also buys and sells store animals and cull stock. Yorkshire Farmers provides a range of other services to its members which include discounted genetics, feed, consumables and advice on production and marketing. It has a strategy to develop close relationships with its customers and, to that end, it has developed a wide range of customised contracts between producers and processors. Through these contracts it looks to provide customised supply chain solutions to the benefit of all involved.

The UK livestock sector, and the pig industry, in particular, has had a difficult time in the past few years, with pig production halving and as many as 75% of producers leaving the industry. Yorkshire Farmers now markets pigs, sheep, cattle and cull sows and buys and sells store pigs on behalf of its members. Faced with this industry meltdown Yorkshire Farmers has looked to work both upstream and downstream of the farmer to help members gain a margin in difficult times. As the livestock sector recovers from foot and mouth disease and disastrous prices

the company is moving forward and is now well placed to help its members meet the challenges that lie ahead.

Yorkshire Farmers also provides a wide range of other services, such as discounted sales of breeding stock, AI, fuel, feed and consumables. It provides advice in health and breeding stock and restocking programmes, business clubs and on-farm recording.

Mike Bell, of Fridaythorpe Pig Producers Ltd, Fridaythorpe, Driffield, has a 630 sow breeder finisher unit with all the progeny

being sold through the group to George Adams. With the help of the company he has just restocked his unit to improve his herd health and performance. Mike speaks highly of Yorkshire Farmers saying:

“The company and its staff have helped me enormously since I became a member, not only in terms of marketing, but also



Picture courtesy of BPEX

Key learning points

- A supply chain approach to livestock marketing benefits everyone in the chain.
- Credit insurance reduces farmers' exposure to risk.
- Aggregation of buying power reduces input costs.

in generally looking after my best interests. I very much appreciated the help I received during my recent restock. The other benefits that come with being a member are discounted breeding stock and requisites.”

Delivering a quality service

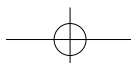
Yorkshire Farmers, which trade over the east of England from Durham to East Anglia, is an Industrial and Provident Society formed in 1932 by pig producers who were concerned over the security of the market for their pigs. The business had a turnover of over £25m for 2003/2004. The company charge a marketing fee and use credit insurance to insure against bad debt. It also provides a management analysis package called Pigibank, the use of which is included within the marketing fee. Howard Cross, managing director, says:

“We must provide a better service than our competitors at the same cost in order to grow our business.”

Richard Foster, of J K Foster and Son, supplies pigs on the Lincpork contract into George Adams. He farms 800 acres and 350 sows, finishing all the progeny to bacon weight at Wiggington near York. Richard says:

“I love the idea of Lincpork and getting close to the customer and producing what the customer wants.”

Richard is pleased with the £1.00/kg minimum price in the contract which gives his business stability. However, he would like to see prices comfortably above this minimum as he is only treading





water at £1/kg. He originally joined Yorkshire Farmers for piece of mind through the guaranteed payment the company offered, as bad debts had been a worry in the past. However, he now buys breeding stock, AI and requisites through the group as well as marketing his pigs. Richard adds:

"I particularly enjoy the business clubs organised by Yorkshire Farmers, through which I have made some good contacts and learnt a great deal from other producers."

Getting close to the processor

Yorkshire Farmers' key customer is George Adams with whom it has an extremely good relationship, particularly related to supplying pigs for the Lincpork Contract. This contract was originally developed to supply a particular type of pig, fed and managed in a particular way to supply a more consistent higher yielding carcasse to Adams. It has recently sold the benefits of this consistent carcasse to the supermarket chain Budgens. The financial benefits of producing and supplying this type of pig have been shared between the processor and the producer with a premium being paid.

The company has developed a wide range of customised contracts back to back between producers and processors, with each producer having his own customised



supply chain. Presently these contracts are with processors but the company is looking to develop closer links with retailers or food service customers in conjunction with its processor customers.

Yorkshire Farmers work closely with Anglia Quality Meat through United Livestock Services (formerly UPM) to provide a better marketing and buying service for members by aggregating the volumes of the two farmer controlled

businesses (FCBs). There is a great deal of synergy between the two FCBs and both feel there are substantial benefits from working together.

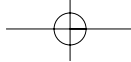
In future, Yorkshire Farmers will look to further increase the range of customers it has and develop more customised business in order to maximise the returns for its members. Howard Cross says:

"The pig industry, in particular, has had a very traumatic time and the future of the industry still hangs in the balance. Recent better pig prices have been eroded by poor herd health and higher costs. Many producers, although making a small margin, are not in a position to invest in their units and may cease production when major investment is needed. I believe it is vital that all the food chain works together to ensure English pork and bacon remain on the menu."

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CONTACT DETAILS

Yorkshire Farmers Livestock Marketing Ltd
 11-13 Castlegate
 Malton
 North Yorkshire
 YO17 7DP
 Tel: 01653 697941
 Fax: 01653 694489



BATA Ltd
 Amotherby Mill
 Main Street
 Amotherby
 Malton
 North Yorkshire YO16 6TA
E: shclarke@bataltd.co.uk
T: 01653 605200
F: 01653 605211
Requisites

Dales Quality Meat Ltd
 Town Foot
 Hawes
 North Yorkshire DL8 3NH
T: 01969 666000
F: 01969 666001
Marketing

Dairy Farmers of Britain Ltd
 Alpha Building
 London Road
 Stapeley
 Nantwich
 Cheshire CW5 7JW
T: 08700 108191
F: 08700 108188
W: www.dfob.co.uk
Dairy Processing and Marketing

Farmway Ltd
 Tyne Dock
 South Shields
 Tyne & Wear NE34 9PL
T: 0191 4287700
F: 0191 4285202
E: csd@farmway.co.uk
W: www.farmway.co.uk
Requisites

Driffield Pea Growers Ltd
 Horsewold Farm
 Middleton on the Wolds
 Driffield
 East Riding of Yorkshire
 YO25 9DD
T: 01377 217496
Marketing

DRS Partnership in Pigs Ltd
 Agriculture House
 Murton Lane
 Murton
 York
 North Yorkshire YO19 5US
E: drspigsLtd@aol.com
T: 01904 481484
F: 01904 481485
Production & Marketing

GrainCo Ltd
 Tyne Dock
 South Shields
 Tyne & Wear NE34 9PL
T: 0191 4287700
F: 0191 4285202
Marketing

Greetland & District Trading Society Ltd
 Victoria Street
 West Vale
 Halifax
 West Yorkshire HX4 8DF
T: 01422 372642
Requisites

Greyfriars & Northern Mushrooms Ltd
 Tanfield Lane
 Wath
 Ripon
 North Yorkshire HG4 5JE
E: cjs@greyfriarsukLtd.demon.co.uk
T: 01765 640634
F: 01765 640396
Marketing

Hedon Salads Ltd
 Main Road
 Newport
 Brough
 East Riding of Yorkshire
 HU12 9EZ
T: 01430441552
Marketing

Howdenshire Growers Ltd.
 Warwick House
 Howden
 Goole
 North Humberside
 DN14 7XD
T: 01430 410223
Marketing

Humber Grain Ltd
 Station Rd
 Holton Le Clay
 Grimsby
 NE Lincolnshire DN36 5HR
T: 01472 840888
Marketing

HumberVHB
 Common Lane
 Welton
 Brough
 North Humberside HU15 1UT
T: 01482 667151
F: 01481 667678
Marketing

Renewable Energy Growers Ltd
 Unit 2
 Manor Business Park
 Top Street
 East Drayton
 Retford DN22 OLG
E: info@energycrop.co.uk
T: 01777 248010
F: 01777 248015
Marketing

Ridings Machinery Ring Ltd
 66 Long Street
 Thirsk
 North Yorkshire YO7 1AU
E: pday@ridingsmachineryring.co.uk
T: 01845 523496
F: 01845 525728
Services

Shire Grain Ltd
 York Road
 Pocklington
 York
 East Riding of Yorkshire
 YO42 1NS
T: 01759 305090
F: 01759 305978
Marketing

Snaith Salad Growers Ltd
 West Bank
 Carlton
 Goole
 East Riding of Yorkshire
 DN14 9PZ
E: simon@salads-yorkshire.com
T: 01405 860354
F: 01405 860502
Marketing

Swaythorpe Growers Ltd
 Southburn
 Driffield
 East Riding of Yorkshire
 YO25 9ED
T: 01377 229264
Marketing

Venico
 Round Green Farm
 Worsborough
 Barnsley
 South Yorkshire
T: 01226 205577
E: richard.elmhirst@which.net
Marketing

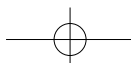
White Rose Farmers Ltd
 c/o Steve Willis
 Fulwith Mill Farm
 Fulwith Mill Lane
 Harrogate
 North Yorkshire HG28HJ
Requisites

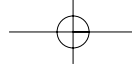
Woldmarsh Producers Ltd
 Cannon Street House
 Cannon Street
 Louth
 Lincolnshire LN11 9LL
T: 01507 602396
F: 01507 602714
w: www.woldmarsh.co.uk
Requisites

Yorkshire Farmers Livestock Marketing Ltd
 11/13 Castlegate
 Malton
 North Yorkshire YO17 7DP
E: yflm@compuserve.com
T: 01653 697941
F: 01653 694489
Marketing

Yorkshire Highland Seed Potato Growers Ltd
 Richard Megginson
 Manor Farm
 Wharham
 East Riding of Yorkshire
 YO4 1SZ
T: 01944 768218
Services

Although every effort has been made to ensure the accuracy of these details, EFFP accept no liability for errors and omissions. If your FCB is not featured above, please contact EFFP.





EFFP Publications



Regional Case Studies

Focusing on regional collaboration, these case studies highlight the diversity and opportunity open to farmers, through the services provided by the regions FCBs.



English Case Studies

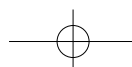
Featuring ten examples of successful collaboration in England.

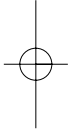
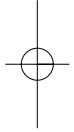
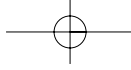
Collaborating for profit

EFFPs market focused strategy to develop collaboration in the future.

International Case Studies

Featuring ten international FCBs offering a vision of the potential for English FCBs operating in a global food market.





English Farming & Food Partnerships

Contact Details

45 Ludgate Hill, London EC4M 7JU

Telephone 020 7213 0430 **Email** info@effp.com **Website** www.effp.com

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