



CHAVEREYS

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MONTHLY FARMING UPDATE

August 2021



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I Policy issues

- 1 The first report of the National Food Strategy, chaired by Henry Dimbleby, has been published. Its recommendations include the introduction of a sugar and salt reformulation tax using the revenue to direct fresh fruit and vegetables to low income families; mandatory reporting for large food companies on sales of various product types as well as food waste to cover sales of food and drink high in fat, sugar or salt, sales of protein by type and sales of vegetables, fruit and major nutrients; a new 'Eat and Launch' initiative should be launched for schools; the eligibility for free school meals should be extended with the household earnings threshold increased from £7,400 to £20,000; the Holiday Activities and Food Programme should be funded for a further 3 years; the Healthy Start voucher scheme should be extended to all households earning under £20,000 with pregnant women or children under 5; trial a 'Community Eatwell' programme supporting those on low incomes to improve their diets; guarantee the budget for agricultural payments until at least 2029 to help farmers transition to more sustainable land use; create a Rural Land Use Framework; define a minimum standards for trade deals and a mechanism for protecting them; invest £1 billion in innovation to create a better food system; create a National Food System Data programme; strengthen government procurement rules to ensure that taxpayer money is spent on healthy and sustainable food; and set a long-term statutory target to improve diet-related health and create a new governance structure for food policy through a Good Food Bill.

II Reform

- 1 Defra has announced short-term transitional funding for producer organisations while a new UK horticulture productivity scheme is developed.
- 2 The Future Farming Resilience Fund, which has made available £10.7 millions to 19 organisations to support farmers and land managers who receive Basic Payments, has opened for applications this month.
- 3 The Farming in Protected Landscapes programme has opened for applications. It offers funding in Areas of Outstanding Natural Beauty, National Parks and the Broads. It will fund projects that support nature recovery; mitigate the impacts of climate change; provide opportunities for people to discover, enjoy and understand the landscape and its cultural heritage; and support nature-friendly, sustainable farm businesses.

III Grants/regulations/legislation/environment

- 1 The Government has published a review of policy for development in areas at flood risk. The National Planning Policy Framework sets out policy for preventing inappropriate development in areas at risk of flooding. Local authorities are expected to ensure development is steered to the lowest areas of flood risk. Where development is considered necessary due to the lack of alternative, lower-risk sites, the Framework expects any such development to be safe throughout its lifetime and should be appropriately flood resistant without increasing flood risk elsewhere. An emphasis is also placed on the use of Sustainable Drainage Systems particularly for major developments and those within flood risk areas.

- 2 A further 90 projects have been awarded a total of £40 millions from the Green Recovery Challenge Fund. Successful projects include £697,000 to Urban Green Newcastle and Northumberland Wildlife Trust to create 45 nectar-rich public sites including the planting of 2,500 trees and 25,000 bulbs and the creation of 18 hectares of grassland; Trees for Cities has been awarded £1,229,600 to plant 55,000 trees in 83 coastal locations in 7 coastal towns; Avalon Marshes Wetland Wonderland in Somerset has been granted £906,700 to improve wetland habitats; the Mersey Forest has received £1,326,700 to deliver its Community Forest programme in Merseyside and Cheshire; and Chester Zoo has been awarded £990,500 to create a 6.5 mile nature recovery corridor.
- 3 The Government has published a review of the Water Industry National Environment Programme as improvements to the overall quality of the water environment have plateaued. In addition, a new Strategic Policy Statement for Ofwat has been published. Key priorities include better protection for chalk streams and rare habitats; a reduction in the frequency and volume of sewage discharges from storm overflows; ensuring water companies have strategic plans to tackle long term risks of drought, flooding and pollution; and a reduction in leakage.
- 4 Project awards have been made under the Natural Environment Investment Readiness Fund. The UK Centre for Ecology and Hydrology in Essex has received £99,931 to develop a saltmarsh code to support habitat restoration activities in 4 sites in England including Old Hall Marshes at Maldon; Norfolk Rivers Trust has been awarded £70,000 to finance wetlands using environmental impact bonds; Norfolk Wildlife Trust has been awarded £99,718 for the Wendling Beck Exemplar Project; and Lincolnshire Wildlife Trust has received £100,000 for the Green Investment in Greater Lincolnshire project.
- 5 Defra, England Community Forest and 6 local councils have announced plans to create the North East Community Forest by planting 500 hectares of trees by 2025.
- 6 Defra has published 'Flood and coastal erosion risk management – an investment plan for 2021 to 2027'. A total of £5.2 billions will be invested in England in the period and is forecast to reduce national flood risk by 11 per cent by 2027. Approximately 336,000 properties will be better protected and, with investment in 2,000 new defence schemes, it is estimated that £32 billions in wider economic damage will be avoided.
- 7 Agriculture in the UK 2020 shows that, between 2000 and 2019, the amount of nitrogen in the soil fell by 24 per cent while there was a fall of 46 per cent in phosphate; in the same period nitrous oxide emissions fell by 9.6 per cent, methane emissions by 9.9 per cent and ammonia by 5.6 per cent; the farmland bird index in 2019 was less than half that in 1970; the area of land farmed organically increased by 0.8 per cent, between 2019 and 2020, to 489,000 hectares; and the area in-conversion rose by 12 per cent to 31,000 hectares.
- 8 In 2019, the UK recycling rate of waste from households was 46.2 per cent, up from 45 per cent in 2018; the recycling rate for England was 45.5 per cent, for Northern Ireland 50.6 per cent, for Scotland 44.9 per cent and for Wales 56.4 per cent; and biodegradable municipal waste sent to landfill fell from 7.2 million tonnes to 6.6 million tonnes.
- 9 The first round of Discovery Grants, under the Nature for Climate Peatland Grant Scheme, has opened for applications.
- 10 The Scottish Government has committed £10 millions to the Nature Restoration Fund to support a mix of urban and rural-focused projects such as improving green space for outdoor learning, green active travel routes, planting of wildlife corridors and natural flood management.

- 11 Growing Kent & Medway has announced £3 millions is available in research and development grants for projects that support inclusive economic growth and environmentally sustainable practices and innovations. Grants of up to £250,000 are available to assist projects that aim to develop green technologies, processes or products for horticultural food and drink businesses in the county.
- 12 The Farming 1.5 Inquiry, a panel of Scottish farmers, academics and NGO's, has published a consensus pathway for making Scottish farming climate compatible. While agriculture currently accounts for 20 per cent of Scotland's greenhouse gas emissions, the panel has produced a set of recommendations to take the sector to net zero by 2045.
- 13 RIPE Building Services, based in Warwick, has secured £250,000 of funding from the Midlands Engine Investment Fund to support its greenhouse system which enables growers to increase output by capitalising on full-spectrum natural daylight.
- 14 The Prince's Countryside Fund and McDonald's UK have published 'A-Zero: A Farmer's Guide to Breaking Free From Environmental Jargon'.
- 15 Several new breeding populations of the larger eight-toothed European spruce bark beetle have been discovered in Kent and East Sussex.

IV Other matters of farm finance and tenure

- 1 Agriculture in the UK 2020 has been published. Between 2019 and 2020 the Utilised Agricultural Area decreased by 1.5 per cent to 17.3 million hectares covering 71 per cent of the land mass; the total croppable area fell by 1.8 per cent to 6 million hectares; the area of oilseed rape fell by 24 per cent to 415,000 hectares; the total number of cattle and calves fell by 1.3 per cent to 9.6 millions; pig numbers fell by 0.5 per cent to 5.1 millions; sheep and lamb numbers fell by 2.6 per cent to 32.7 millions; and the total labour force fell by 0.8 per cent to 472,000. As regards incomes and productivity, agriculture's contribution to the national economy was unchanged at 0.49 per cent and its share of employment was also unchanged at 1.44 per cent; 20 per cent of farms failed to make a positive Farm Business Income while 26 per cent had a Farm Business Income in excess of £50,000; Total Income from Farming is estimated to have fallen 15.7 per cent to £4.1 billions; Gross Output fell by 2.8 per cent to £26.7 billions; the cost of intermediate consumption fell by 0.5 per cent to £17.3 billions; Gross Value Added fell by 6.7 per cent to £9.4 billions; and Total Factor Productivity fell by 6.7 per cent.
- 2 The balance sheet analysis and farming performance report for England in 2019/20 has been published. The average liabilities for all farms was £248,200; 17 per cent had liabilities of over £400,000 while 26 per cent had liabilities of less than £10,000; pigs and poultry farms had the greatest average level of debt at £563,200 followed by dairy farms at £458,800 and general cropping farms at £345,400; lowland grazing livestock farms had the lowest average liabilities at £99,100; the greatest level of debt was in farms in the East of England at £338,400 whilst the lowest were in the South West at £185,300. The average net worth of farms was unchanged at £1.87 millions; mixed farms had the highest average net worth at £2.78 millions while tenanted farms had an average net worth of £302,000; while very large farms had an average net worth of £4.3 millions and part-time farms only £1.2 millions, the net worth per hectare was £11,600 and £19,300 respectively. The average gearing has remained largely unchanged since 2009/10 at 12 per cent; 52 per cent of farms had gearing of less than 5 per cent while 8 per cent had gearing of over 40 per cent with pig and poultry farms having the highest average gearing at 32 per cent.

The average liquidity ratio was 239 per cent, up from 222 per cent in 2018/19; 69 per cent had a ratio of over 2000 but 16 per cent had a ratio of less than 100 per cent; grazing livestock and cereal farms had average liquidity of 331 per cent while pig and poultry farms had the lowest average ratio at 132 per cent. The median return on capital employed was -0.4 per cent with 54 per cent of farms registering a negative return.

- 3 The October 2020 Farmer Opinion Tracker survey has been published. It reveals that 63 per cent of respondents fully (7 per cent) or roughly (56 per cent) understood Defra's vision for farming; 54 per cent expect to need to make changes to their farm business in the next 3-5 years; 89 per cent stated that Defra paying for environmental outcomes will be very (68 per cent) or moderately (21 per cent) important; and 51 per cent of farmers feel positive about the future of farming.
- 4 The Agricultural Price Index for May shows that outputs rose by 2.8 per cent, compared to April, and by 14.4 per cent compared to a year earlier. The index for inputs increased by 0.9 per cent and 9.2 per cent respectively.
- 5 The latest Knight Frank Farmland Index shows that bare land prices in England and Wales rose by 2 per cent in the second quarter of 2021 to £17,458/ha.

V Product prices

A Market background

- 1 Sterling movements against the Euro and Dollar tracked each other this month, with Sterling closing stronger. Sterling opened against the Euro at 85.9p per €, rose to 85.1p and fell to 86.6p with volatility in between, before improving again to close at 85.3p per € (up 0.6p). The US Dollar opened the month at 72.3p and rose to 71.8p, dropped to 73.6p, but recovered to close the month at 71.9p per \$ (up 0.4p). Crude oil prices remained volatile, with a \$9 swing in the month, but closed marginally up. Brent Crude, from a starting position of \$74.62 per barrel, peaked at \$77.16 and dropped to \$68.62 before closing the month at \$75.41 per barrel (up \$0.79).

B Crops

- 1 With harvest underway in the northern hemisphere, crop price volatility increased this month. Cereal prices lifted further before combines started rolling in earnest, with feed wheat nudging £200 per tonne once more, but fell away sharply in the final days. Harvest progress across Europe and Russia, and rain reaching the struggling US maize crop, pushed prices down, compounded by speculative traders cashing out. Expectation for the 2021/22 season remains favourable, but longer term is less so. Milling premiums have opened at £16 to £18/tonne. LIFFE feed wheat futures in the shorter term, whilst particularly volatility, closed up whilst 2023 pricing held steady. By late July, deliveries for November 2021 and 2022 were £177/tonne (+4) and £171/tonne (+4) respectively whilst March 2023 deliveries remained at £171/tonne (-) and May 2023 deliveries were £172/tonne (-). Oilseed rape prices fell back as harvest progressed, as expected, but saw a partial reverse as the month end approached as concerns grew over the Canadian Canola crop's response to hot and dry conditions.

Average spot prices in late July (per tonne ex-farm): feed wheat £165 (-26); milling wheat £182 (-23); feed barley £145 (-30); oilseed rape £436 (-62); feed peas £208 (-12); feed beans £218 (-12).

- 2 The main source of potato prices, the AHDB Potato sector, ceased active operation in the first week of July. No average potato prices were available at the end of July.

C Livestock

- 1 Cattle prices gained marginally, with minimal volatility and small price increments this month. The average finished steer price opened at 223p/kg lw and rose to 226p/kg where it closed (up 3p, to sit 22p above the closing average a year earlier). The average finished heifer price moved independently, opening at 231p/kg lw and dropping to 229p/kg before increasing to a closing average of 235p/kg (up 4p, to sit 16p above the price a year earlier). The average dairy cow price increased markedly in the first half of the month but fell away as the month progressed: opening at £1,168, it peaked at £1,431 before dropping to close at £1,183 (up £15 to sit £201 below the closing average a year earlier).
- 2 The average finished lamb price (SQQ live weight, new-season) remained highly volatile this month. The average, from an opening position of 269p/kg lw, continued the free-fall seen in June, bottoming out at 241p/kg and fluctuating between that and 260p/kg throughout the month, before closing at 258p/kg lw (down 11p, to sit 34p/kg above the average a year earlier).
- 3 The average UK all pig price (APP) continued its upward trend. Opening at 159.6p/kg dw, the average improved week on week to close the month at 164.9p/kg dw (up 5.3p to sit 3.5/kg below the closing average a year earlier).
- 4 The UK average 'all milk' price for May, reported this month, recorded a gain of 0.70ppl to an average of 30.11ppl (3.40ppl above the average in May 2020 and 1.68ppl above the rolling 5-year average of 28.43ppl). The EU (ex UK) average for April remains the most recent information.

VI Other crop news

- 1 The first harvest report published by AHDB covering up to 27 July has indicated that 47 per cent of barley had been harvested but only 9 per cent of oilseed rape, the second slowest start since 2014. Those oilseed rape crops harvested are showing yields in the range of 3.0-3.4t/ha while barley yields are averaging 6.6-7.0t/ha.
- 2 Agriculture in the UK 2020 has revealed that wheat production fell by 40 per cent to 9.7 million tonnes, the smallest since 1981, with its value down 36 per cent at £1.6 billions; barley increased by 0.9 per cent to 8.1 millions but its value fell by 1.7 per cent to £1.1 billions; sugar beet fell by 23 per cent to 6 million tonnes while its value fell by 18 per cent to £172 millions; vegetables rose by 8.8 per cent to £1.6 billions; and fruit rose by 16 per cent to £1 billion.
- 3 Defra has published statistics on horticulture for 2020. The value of home-produced vegetables rose by 10 per cent to £1.7 billions; the volume of production rose by 3 per cent to 2.6 million tonnes; the value of field vegetables rose by 12 per cent to £1.3 billions while the value of protected vegetables rose by 4.1 per cent to £350 millions; the value of home-produced fruit rose by 16 per cent to £1 billion although volume fell by 4.5 per cent to 657,000 tonnes.
- 4 The Red Tractor assurance scheme has announced changes to its standards to take effect from November. The requirement to leave livestock buildings for 5 weeks between cleaning and using them to store grain has been removed; grain trailer ID must be identifiable on at least the rear and one side of the trailer and ID is only necessary when transporting grain to a third-party intake; all farms with workers must have a written Health and Safety policy; there are revised requirements for vermin control standards; and moisture meter calibration can be carried out on farm using reference samples.

- 5 The Horticultural Trades Association has called for a greater focus on reducing contamination in food and garden waste to help the industry transition away from peat. The industry would like to see a greater quantity and quality of composted garden material available to growers.
- 6 The Red Tractor food assurance scheme has announced changes to farm standards for the fresh produce sector. These include a revised, strengthened and upgraded approach to field/production site risk assessment to better manage risks from historic and adjacent activities; the introduction of a new protected cropping section with content relevant to established, protected growing environments and new crop production systems; revised, strengthened and consistent expectations for pesticide residue testing; and new record keeping systems for the introduction of biological controls.
- 7 The Agricultural Price Index for May shows increases of 4 per cent for barley, compared to April, 0.1 per cent for oats, 9.6 per cent for oilseed rape and 3.5 per cent for forage plants but there were falls of 1.2 per cent for wheat, 1.1 per cent for potatoes, 0.3 per cent for fresh vegetables and 20.2 per cent for fresh fruit. Compared to a year earlier, there were increases of 38.1 per cent for wheat, 33 per cent for barley, 2.8 per cent for oats, 51.1 per cent for oilseed rape, 153.2 per cent for forage plants and 11.3 per cent for fresh vegetables but falls of 13.8 per cent for potatoes and 3.8 per cent for fresh fruit
- 8 The first AHDB Recommended List winter barley trial sites in Dorset, Lincolnshire and the Scottish Borders have produced average yields of 9.62t/ha, 0.27t/ha below the 5-year average.
- 9 The MothNet project, a collaboration between Agsense and International Pheromone Systems, has secured funding from Innovate UK to develop a fully automated codling moth monitoring system for the benefit of apple growers.
- 10 Kantar has reported that, during the first lockdown, 860,000 households in the UK bought pears for the first time.
- 11 NIAB EMR is to launch a new Kent-bred strawberry 'Malling TM Ace' which will provide fruit throughout the season which matches the quality of June strawberries.
- 12 Research from the University of Nevada, published in *Nutrients*, has suggested that adding strawberries to diets could improve cardiometabolic risk factors in adults who are obese or have elevated low-density lipoprotein cholesterol.

VII Other livestock news

- 1 Agriculture in the UK 2020 shows that the value of beef and veal rose by 4 per cent to £2.9 billions; pig meat rose by 10 per cent to £1.4 billions; mutton and lamb rose by 9.4 per cent to £1.3 billions; poultry meat rose by 5.3 per cent to £2.8 billions; eggs increased by 11 per cent to £730 millions; but milk and milk products fell by 1.8 per cent to £4.4 billions.
- 2 The Red Tractor assurance scheme has announced changes to its standards to take effect from November. These include tethered housing systems, for stock of any age, will not be permitted; a health plan to eradicate bovine viral diarrhoea will be required and must be implemented; all farms with workers must have a written Health and Safety policy; an animal health plan must be reviewed and approved by a vet at least once every year; at least one person on farm must have undertaken medicine training to help raise awareness of antimicrobial resistance; the routine euthanasia of dairy bull calves must be eliminated by 2023; measures to avoid tail biting and tail docking in pigs must be put in place; the enrichment standard for a combination of enrichment materials and objects must be met; stock people must be trained in pig euthanasia; anyone involved in the care of pigs must be fully trained in pig welfare; all pig producers must be signatories to the Significant Diseases Charter.

For poultry, all units enrichment needs to be placed in the shed by day 3 at the latest; only slower-growing breeds can be used for free range birds; all broiler, poussin and free range units must meet the minimum standard of windows at 3 per cent of the floor area by October 2023; a heat stress policy must be implemented; for hatchery eggs, eggs must be fumigated and sanitised prior to setting, there must be temperature and humidity-controlled storage rooms and records of checks, improved egg traceability and transport of eggs and chicks, testing for *Mycoplasma gallisepticum* and *Mycoplasma syneviae* must be undertaken and retained; and the turn around times between flocks on farms must be no less than 5 days.

- 3 Field trials for a cattle vaccine and a new skin test for bovine TB have begun on a bovine TB-free farm in Hertfordshire. Further herds will join the scheme later this year and farms in Wales will participate.
- 4 The latest AHDB outlook for beef suggests a 4 per cent fall in beef and veal production due to tighter cattle availability; domestic consumption to fall by 2 per cent; imports expected to fall by 0.4 per cent; and exports are expected to fall by 8 per cent.
- 5 The latest OECD-FAO Agricultural Outlook to 2030 reports that meat production is expected to increase by 13 per cent by 2030 with poultry production expected to increase by 17 per cent. Pig meat is forecast to increase by 13 per cent, beef by 6 per cent and sheep meat by 16 per cent.
- 6 Research undertaken by National Craft Butchers suggests that 59 per cent of small abattoirs are likely to close within the next 5 years.
- 7 During June, UK prime cattle slaughterings fell by 4.2 per cent, compared to a year earlier, to 163,000; beef and veal production fell by 7.9 per cent to 72,000 tonnes; sheep slaughterings fell by 11 per cent to 881,000; mutton and lamb production fell by 12 per cent to 20,000 tonnes; pig slaughterings rose by 18 per cent; and pigmeat production rose by 20 per cent to 89,000 tonnes.
- 8 The Agricultural Price Index for May shows increases of 4.9 per cent for pigs, compared to April, 1.8 per cent for sheep and lambs, 0.1 per cent for poultry and 2.9 per cent for eggs but there was a fall of 2.2 per cent for cattle and calves. Compared to a year earlier there were increases of 16.5 per cent for cattle and calves, 40.1 per cent for sheep and lambs, 4.7 per cent for poultry, 13.9 per cent for milk and 8.5 per cent for eggs but a fall of 10.2 per cent for pigs.
- 9 As at 1 April, the British milk herd was 1.67 millions, 32,000 down on April 2020. However, this decrease was matched by a corresponding increase in the number of youngstock to 902,000.
- 10 The number of dairy herds in Scotland fell by 7 in the first half of 2021 to 836 although the average herd size increased by 4 to 213.
- 11 Arla is to move production of its Lactofree milk for the UK market from Denmark and Sweden to Settle in Yorkshire.
- 12 In June, average butterfat fell by 1.4 per cent to 4.02 per cent but was 0.7 per cent higher than a year earlier. Average protein fell by 1.7 per cent to 3.29 per cent but was 0.8 per cent up on a year earlier.
- 13 Medina Dairy and Freshways are in merger talks.
- 14 Saputo is to acquire Wensleydale Dairy Products.
- 15 The latest AHDB sheep meat outlook suggests there will be a 7 per cent decline in production this year; the lamb crop is expected to be similar to 2020 but with a different kill pattern; imports will continue to decline; export volumes will be limited through production and trade friction; and the outlook for prices is optimistic.

- 16 Exercise Holly has taken place with agencies from all 4 home countries working together to test contingency plans to respond to a national outbreak of African Swine Fever.
- 17 For the first time Germany has reported an outbreak of African Swine Fever in domestic pigs.
- 18 The latest AHDB outlook for the UK pig meat market includes production growth is expected to slow in the second half of 2021; exports will remain challenging with Chinese demand slowing and some friction supplying the EU; higher production and lower exports will boost domestic supply availability and restrain imports; and while demand should remain strong, volumes will increasingly move through the food service sector rather than through retail which will be less beneficial for British producers.
- 19 In the three months to June, 7.9 million cases of eggs were packed in UK egg packing stations, an increase of 0.5 per cent on the first quarter and 3.1 per cent up on the same period a year earlier. The average farm-gate price was 88.5p per dozen, 1.6 per cent up on the first quarter and 13 per cent up on a year earlier. The production of egg products was 21,300 tonnes, 18 per cent up on the first quarter and 16 per cent up on a year earlier.
- 20 During June, UK commercial layer chick placings rose by 2.3 per cent, compared to a year earlier, to 3.6 million chicks; broiler chick placings rose by 6.8 per cent to 96.5 million chicks; turkey chick placings rose by 24 per cent to 1.4 million chicks; turkey slaughterings rose by 30 per cent to 900,000 birds; broiler slaughterings rose by 5.1 per cent to 90 million birds; and total poultry meat production rose by 7.3 per cent to 161,000 tonnes.

VIII Inputs/Supply businesses

- 1 The Agricultural Price Index for May shows increases of 1.7 per cent for energy and lubricants, compared to April, 1.8 per cent for fertilizers, 0.4 per cent for chemicals, 0.9 per cent for animal feedingstuffs, 1.4 per cent for vehicle maintenance and 2.5 per cent for building maintenance. Compared to a year earlier there were increases of 1.9 per cent for seeds, 21.3 per cent for energy and lubricants, 20.9 per cent for fertilizers, 0.5 per cent for veterinary services, 13.8 per cent for animal feedingstuffs, 3.7 per cent for vehicle maintenance and 11.6 per cent for building maintenance but a fall of 2.3 per cent for chemicals.

IX Marketing

- 1 Agriculture in the UK 2020 shows that the value of food, feed and drink exports fell by 15 per cent, between 2019 and 2020, to £21.4 billions while the value of imports fell by 6.2 per cent to £48 billions resulting in an increase in the trade gap of 2 per cent to £26.6 billions.
- 2 The AHDB/YouGov Consumer Tracker survey has revealed that, when buying premium beef, 45 per cent wanted British, 42 per cent selected by the colour of the meat, 42 per cent selected by the amount of fat, 41 per cent selected a quality assured product and 38 per cent wanted a free range product. As regards pork, 40 per cent wanted British, 34 per cent wanted quality assurance, 34 per cent were influenced by the amount of fat, 34 per cent wanted a free range product and 33 per cent wanted an outdoor reared product.
- 3 A survey conducted by OnePoll has revealed that 85 per cent of the British public want future trade deals to protect UK farmers from being undercut by cheaper, sub-standard food imports. 84 per cent of respondents wanted environmental standards for imports to be no less than at home while 86 per cent wanted the same for animal welfare standards.

- 4 According to Kantar, in the year to 13 June, spending on red meat increased by 12 per cent but with a 15 per cent increase in the spend on premium, private label red meat although it only represents 8.8 per cent of the red meat market. Volume sales of premium beef increased by 14 per cent and of premium pork by 10 per cent.
- 5 In May, UK exports of cheese increased by 13 per cent, compared to April, powdered/condensed milk by 34 per cent and yoghurt by 26 per cent but butter fell by 14 per cent and whey by 9 per cent. Compared to a year earlier all categories were down apart from milk and cream. Imports in May rose by 14 per cent for whey, 38 per cent for butter and 17 per cent for cheese and curd but milk and cream were down by 3 per cent, powdered/condensed milk by 4 per cent and yoghurt by 7 per cent.
- 6 For the first time in over 20 years, the UK had a cheddar surplus with the EU at 470 tonnes while, including non-EU trade, the surplus increased to 7,400 tonnes.
- 7 The Welsh Government has launched a new Food and Drink Wales Retail Plan to help food and drink companies build relationships with retailers.
- 8 Gower Salt Marsh Lamb has been granted Protected Designation of Origin status.

X Miscellaneous

- 1 A survey of more than 2,000 people outside of rural areas in England and Wales, carried out by Censuswide, found that 87 per cent of respondents said visits to Britain's farmed landscape had improved their wellbeing while 47 per cent said they valued the British countryside and farmland more since the pandemic began.
- 2 The Health and Safety Executive has reported 41 on-farm fatalities in 2020/21, the highest in 5 years.

Postscripts

Those who are too smart to engage in politics are punished by being governed by those who are dumber.

- Plato

Politicians are the same all over.

They promise to build a bridge even where there is no river.

- Nikita Khrushchev

When I was a boy I was told that anybody could become President; I'm beginning to believe it.

- Irving Stone

Politicians are people who, when they see light at the end of the tunnel, go out and buy some more tunnel.

- John Quinton

Politics is the gentle art of getting votes from the poor and campaign funds from the rich, by promising to protect each from the other.

- Oscar Ameringer

I offered my opponents a deal: "if they stop telling lies about me, I will stop telling the truth about them".

- Adlai Stevenson

A politician is a fellow who will lay down your life for his country.

- Texas Guinan

I have come to the conclusion that politics is too serious a matter to be left to the politicians.

- Charles de Gaulle

Instead of giving a politician the keys to the city, it might be better to change the locks.

- Doug Larson

I am reminded of a joke: What happens if a politician drowns in a river?

That is pollution.

What happens if all of them drown? That is solution!!!

I have come to the conclusion that one useless man is a shame, two are lawyers and three or more are the government.

- John Adams (1735 - 1826)

Suppose you were an idiot. And suppose you were a member of Government.

But then I repeat myself.

- Mark Twain (1835 – 1910)

I don't make jokes. I just watch the Government and report the facts!

- Will Rogers (1879 – 1935)

Monthly Farming Update

It's always good to talk!

The Tenancy Reform Industry Group (TRIG) has published a Code of Good Practice for projects, schemes or works requiring landlord's consent in agricultural tenancies. The Code is designed to provide guidance for landlords and tenants to assist in agreeing terms for variations to an agricultural tenancy under either of the 1986 and 1995 Acts.

The Code also includes guidance specifically in relation to the 2021 Regulations, many of which came into force on 21 June.

The guidance sets out steps which should be taken where a tenant wishes to submit a proposal to a landlord for consideration. The steps are:

1. Early consultation
2. Agree a timetable
3. Prepare details of the tenant's proposal for consideration by the landlord – the tenant should prepare a sound business case which is proportionate to the proposal
4. Landlord's consideration of the tenant's proposal – this should lead to a formal written response
5. Formal written agreement

Where the tenancy is under the 1995 Act or the tenancy is under the 1986 Act but is not subject to the 2021 Regulations, there is no formal recourse to require a landlord to consent to a tenant's proposal and there is no means whereby a landlord's refusal can formally be reversed or challenged.

We welcome feedback on the MFU.

Does this issue raise any questions in your mind?

Would you like more information on a particular item?

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The MFU was edited from 1991 to 2006 by John Nix, Emeritus Professor of Farm Business Management at Imperial College London



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