



CHAVEREYS

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MONTHLY FARMING UPDATE

July 2019



I Policy issues

- 1 The Government is to introduce “Natasha’s Law” which will require food businesses to include full ingredients labelling on pre-packaged foods.
- 2 Henry Dimbleby, a co-founder of restaurant chain Leon and the Sustainable Restaurant Association, has been appointed to lead the first major review of the UK food system in 75 years. His brief is to investigate the entire food system and consider what changes are needed to ensure it:
 - delivers safe, healthy, affordable food, regardless of where people live or how much they earn
 - is robust in the face of future shocks
 - restores and enhances the natural environment for the next generation
 - is built upon a resilient and sustainable agricultural sector
 - is a thriving contributor to our urban and rural economies, delivering well paid jobs and supporting innovative producers and manufacturers
 - operates in an efficient and cost-effective wayThe recommendations are expected to generate a National Food Strategy to be published next year.
- 3 The governments of Ireland, France, Poland and Belgium have expressed concern to the European Commission over aspects of the Mercosur trade deal, in particular the effect on the beef sector. Further, AVEC, which represents the European poultry meat sector, is concerned about the influx of Brazilian breast meat.
- 4 The Scottish Government has formed a working group of producers, consumer and environmental organisations to develop future policy on farming and food production.
- 5 The Animal Welfare (Sentencing) Bill has been introduced to Parliament. It proposes prison sentences of up to 5 years.

II CAP/Brexit (etc.) support details/payments

- 1 The National Audit Office has warned that the computer system behind the Environmental Land Management System has not been allocated sufficient time to be fully developed and could be plagued with problems.
- 2 Those farmers and landowners who have outstanding monies due under Environmental Stewardship and Countryside Stewardship agreements, some dating back to 2015, will be paid in full this month even though their claims have not been fully assessed.

III Grants/regulations/legislation/environment

- 1 Defra and Natural England have issued three new general licences for the killing or taking of wild birds. The first covers certain species of wild birds to conserve other wild birds, flora and fauna. This covers carrion crow, jackdaw, jay, magpie, rook, Canada goose, Egyptian goose, monk parakeet, ring-necked parakeet, sacred ibis and Indian house-crow. A further licence covers the need to preserve public health or public safety and includes carrion crow, jackdaw, magpie, feral pigeon, rook, Canada goose and monk parakeet. The third licence covers the protection of serious damage to livestock, foodstuffs for livestock, crops, vegetables, fruit, growing timber, fisheries or inland waters. This licence covers carrion crow, jackdaw, magpie, feral pigeon, rook, wood pigeon, Canada goose, Egyptian goose, monk parakeet and ring-necked parakeet.

- 2 Over 100 major firms in the food industry, including all of the large supermarkets, have signed a pledge to help halve food waste by 2030. It is estimated that UK householders spend £15 billions every year on food that is thrown away.
- 3 The number of organic farms in France has risen to 9.5 per cent of the total, approaching the Government's target of 15 per cent by 2022. Organic food sales now amount to 5 per cent of the total.
- 4 Following the finding of Oak Processionary Moth caterpillars in Hampshire on trees imported from the Netherlands, the Plant Health Services has urged woodland managers, landowners, the forestry industry and tree nurseries to be vigilant.
- 5 The EU's North Sea Region Interreg Programme has granted £4.1 millions to BEESPOKE (Benefiting Ecosystems through Evaluation of Food Suppliers for Pollinators to Open up Knowledge for End users) to explore ways of increasing the level of pollinators and crop pollination. The objective is to increase the diversity of insect pollinators and crop yields by 10 per cent.
- 6 The Government has launched the Ash Tree Strategy which consolidates all the evidence on ash trees and their threats to identify future research needs to protect the species.
- 7 University of Lincoln has been awarded funding of £5.4 millions from the Expanding Excellence in England (E3) Fund to allow the creation of Lincoln Agri-Robotics to develop robotics for the food and farming industries.
- 8 Results from the February Farm Practices Survey on greenhouse gas mitigation practices in England show that 58 per cent of holdings have a nutrient management plan; 61 per cent are taking action to reduce greenhouse gas emissions; 52 per cent of farmers process waste by anaerobic digestion; 78 per cent of holdings spread manure or slurry on grass or arable land; 64 per cent of farmers store manure in temporary heaps in fields; 73 per cent of farmers have a Farm Health Plan; 75 per cent of livestock holdings sow some or all of their temporary grassland with a clover mix; and 71 per cent of holdings with livestock use a ration formulation programme or nutritional advice.
- 9 An outbreak of bee disease American Foulbrood has been found in an apiary near Blairgowrie in Perthshire. There is no permitted treatment for the disease in the UK.
- 10 The Scottish Government has allocated £11 millions to help repair and restore Scotland's peatland areas which are estimated to hold 1,600 million tonnes of carbon dioxide.
- 11 Defra has granted the University of Reading £2.2 millions to maintain and curate the National Fruit Collection at Faversham for the next 5 years.

IV Other matters of farm finance and tenure

- 1 An estimate has been published of Total Factor Productivity for 2017/18, TFP represents how efficiently the agricultural industry uses the resources that are available to turn inputs into outputs. TFP in England is estimated to be 16 per cent higher than in 1990/91, in this period outputs have increased by 7 per cent while inputs have decreased by 8 per cent. The greatest increase occurred in general cropping farms at 32 per cent while dairy and cereal farms recorded increases of 27 per cent and 25 per cent respectively. In contrast grazing livestock farms recorded a fall of 21 per cent with falls of 21 per cent for lowland grazing livestock and 9 per cent for less favoured area livestock grazing. Mixed farms recorded a fall of 4 per cent.
- 2 The Environment, Food and Rural Affairs Select Committee has stated the Agricultural Bill must have a stronger focus on affordable food.

- 3 Headline figures from the latest Food Statistics Pocketbook show that the agri-food sector contributed £121.6 billions to national Gross Value Added in 2017; in the quarter to December 2018, 4.1 million people were employed in the agri-food sector, 14 per cent of the total; in real terms foods and non-alcoholic beverage prices fell by 4.7 per cent between 2008 and 2018; consumer spending on food, drink and catering totalled £226 billions in 2018; and food and drink exports totalled £22 billions in 2017. Gross Value Added can be split as follows:

	£
Agriculture and Fishing	11.3 bn
Food and Drink Wholesaling	31.1 bn
Food and Drink Retailing	30.3 bn
Non-residential Catering	36.4 bn

This represented a 6.4 per cent increase on 2016.

- 4 The Agricultural Price Index for April shows outputs up 0.2 per cent on March and 1.3 per cent on a year earlier. Inputs were up 0.4 per cent on March and 5.4 per cent on a year earlier.
- 5 The Scottish Government has committed £5 millions to support women returning to work following a career break. The fund will include the agricultural sector. In addition, three pilot training programmes developed by the Women in Agriculture Taskforce, specifically aimed at women living or working in Scottish agriculture, have been launched.
- 6 In the year to December 2018, average house prices in rural areas rose by 0.5 per cent, compared to the year to September 2018, to £333,400. In urban areas there was a 0.4 per cent increase to £306,800. The unemployment rate in rural areas fell from 2.9 per cent in the quarter to December 2018 to 2.4 per cent in the quarter to March 2019. In urban areas there was a 0.1 per cent fall to 4.1 per cent. The percentage of the working age population on Jobseeker's Allowance in rural areas fell from 0.4 per cent to 0.3 per cent, in urban areas it fell from 0.9 per cent to 0.7 per cent. However, the number of redundancies per 1,000 workers in rural areas rose from 3 to 3.7 but fell in urban areas from 3.6 to 3.3.
- 7 Statistics for 2018 show that 474,000 hectares in the UK are farmed organically; 70 per cent of organic land is accounted for by permanent grass; 8 per cent of the organic area is used to grow cereals; 61 per cent of the total organic area is in England; 3.3 per cent of UK cattle is reared organically; and there are 6,200 organic producers in the UK.

V Product prices

A Market background

- 1 Whilst UK politics remained the predominant Forex market driver this month it also managed to retain its 'scraping the bottom of the barrel' quality, which left Sterling open to volatility. Against the Euro, Sterling opened at 88.6p per € and fell back slowly, aside from a few short-lived peaks, for the entire month to close at 89.5p per € (1.1p down). The US Dollar was less linear and with only small movements; opening at 79.2p per \$, peaking at 78.4p in the first week, weakening to a low of 79.9p and peaking at 78.4p again before closing 0.5p down, at 78.7p per \$. Brent Crude oil prices remained low in the first half of the month but improved thereafter. From an opening position of \$61.99, the average price dropped to \$59.12 and peaked just below \$66.00 before relaxing to a close of \$64.74 per barrel; a net improvement of \$2.75 (4 per cent).

B Crops

- 1 Average wheat prices dropped back overall this month but this masks the early increases that were followed by a £5 drop mid-month and steady improvement in the latter stages. The main drivers behind the suppressed market were reports allaying concerns over US maize plantings and global weather patterns having been more agreeable generally this month. Despite this, questions remain over crop quality in Russia and dry conditions in Australia and Canada. Milling wheat has been partially insulated against the reductions, as premiums increased to take up the slack.

LIFFE feed wheat futures remained volatile for the first half of June but then held static for the remainder: In late June, deliveries for November 2019 and 2020 stood at £152/tonne (-3) and £154/tonne (-) respectively. Oilseed prices remain under pressure from a relatively plentiful global supply (largely from plantings in Ukraine, Australia and Canada) despite the UK crop areas being materially down.

Average spot prices in late June (per tonne ex-farm): feed wheat £147 (-3); milling wheat £170 (-); feed barley £123 (-2); oilseed rape £306 (-5); feed peas £204 (+1); feed beans £247 (+1).

- 2 The average potato price was generally buoyant this month. Movement of crop continues to be largely through contracted supplies but the improvement in the spot price reflected the growth in difference between supply and demand. 2019 maincrop is back on track in many regions following recent rain, although some areas were hit with excessive rain levels hindering timely field access and in worst cases severe flooding decimated crops. The average potato price, from a starting point of £213 per tonne, dropped to £210 before improving again to a closing high of £215 per tonne (up £2 and £65 above the late June 2018 close). The free-buy average moved with more amplitude; from an opening position of £232 per tonne it dropped as low as £222 before closing the month at a high of £242 per tonne (up £10, to sit £144 above the average in late June 2018).

2018 crop prices for grade 1 packing in late June (per tonne ex-farm): Salad varieties, mainly Charlotte and Gemson, were trading at £300; Maris Piper had dropped back to between £200 and £305 whilst King Edwards had dropped back at the top end to £200; Estima and other white varieties had improved materially to between £285 and £375, with the top prices aimed at samples with high baker content; whilst red skin varieties, largely Mozart and Desiree, had improved to between £245 and £300.

C Livestock

- 1 Cattle prices, after small movements in both directions, ended up broadly where they started. The average finished steer price rose from its opening position of 181p/kg lw to peak at 182p, before falling back to 180p/kg lw where it closed (1p down in the month and 18p/kg below the closing average a year earlier). The average finished heifer price performed similarly; gaining a penny on its opening position of 194p/kg lw, falling back to 192p before improving again to close at 194p/kg lw (unchanged in the month and 12p below the price a year earlier). The average dairy cow price kept its volatility, rising from its opening position of £1,108 per head to peak at £1,253 before falling hard in the latter weeks to close at £908 per head (£200 down and £219 below the average a year earlier).
- 2 Lamb prices (new season) fell back materially over the course of the month from the high opening position noted in May, as more animals reached market. The average new season finished lamb price (SQQ live weight) fell from its opening position of 234p/kg lw, and throughout the month, to a closing position of 209p/kg lw (11p/kg below the average a year earlier).

- 3 The average UK all pig price (APP) continued its trend of improvement this month, in line with expectation for this stage in the season. Opening at 146.6p/kg dw, the average improved steadily over the month to close at 151.6p/kg (up 5.0p to sit 1.3p/kg below the closing average a year earlier).
- 4 The UK average 'all milk' price for April, published in late June, reported a fall of a further 0.70p giving an average of 28.24ppl (0.84ppl above the average in April 2018 and 0.87ppl above the rolling 5 year average of 27.37ppl). In the rankings against the 'EU28' farmgate milk price for April, the UK lost one place to sit 18th against a marginally stronger EU28 weighted average of 30.47ppl (up 0.08ppl in the month).

VI Other crop news

- 1 As a result of adverse weather the US Department of Agriculture has reduced the maize planting area by 1.2 million hectares and the estimated corn yield by 35 million tonnes.
- 2 DSV has announced that the first 'quad-layer' oilseed rape varieties featuring enhanced disease resistance yet capable of high yields with minimal inputs are expected to be commercially available in 2020. One variety features R1m7 phoma stem canker, turnip yellows virus, pod shatter and club root resistance. The other is a Clearfield variety with similar resistances.
- 3 The Sainsburys Laboratory has been granted consent to plant genetically modified potatoes at Rothamsted Research Centre and the NIAB trial site in Cambridge.
- 4 Scotland's Rural College is investigating how drones can be used to spot diseases in potato crops.
- 5 Seed specialist KWS SAAT SE is to acquire Pop Vriend Seeds.
- 6 AHDB has launched Storage Network as part of an £800,000 fund for potato sprout suppression and storage. The facility provides advice and visits.
- 7 The Agricultural Price Index for crop outputs in April rose by 1 per cent compared to March and by 13 per cent compared to a year earlier; cereals fell by 1.6 per cent with wheat down by 1.4 per cent, barley 3.9 per cent and oats 1.8 per cent but all three cereals were up on a year earlier at 19.3 per cent, 4.2 per cent and 49.8 per cent respectively; potatoes rose by 4.2 per cent and 32.9 per cent respectively; oilseed rape fell by 2.8 per cent but was up 6.5 per cent on a year earlier; forage plants were static but down 48.4 per cent on a year earlier; fresh vegetables rose by 1.2 per cent and 15.2 per cent respectively; and fresh fruit was up 30.1 per cent and 7.5 per cent respectively.
- 8 The value of home produced vegetables fell in 2018 by 0.5 per cent to £1.4 billions with volume down by 12 per cent to 2.4 million tonnes. The value of field vegetables fell by 0.5 per cent to £1.1 billions while the value of protected vegetables fell by 0.6 per cent to £331 millions. The value of home produced fruit fell by 0.6 per cent to £753 millions with volumes down 8.9 per cent at 693,000 tonnes.
- 9 AHDB has announced the arrival of the diamond-back moth from Europe. It is resistant to pyrethroid insecticides and can devastate brassica crops.
- 10 The Under 40s Fruit Growers has been rebranded as NextGen Fruit Group and has announced the 2021 study tour will be to New Zealand.

VII Other livestock news

- 1 The Agricultural Price Index for April shows animal and animal products up 0.6 per cent on March but down 4.5 per cent on a year earlier; compared to March, cattle and calves were up 2.7 per cent, pigs 1.9 per cent, sheep and lambs 9.8 per cent and poultry 0.4 per cent; compared to a year earlier, cattle and calves fell by 4.8 per cent, pigs by 4.1 per cent, sheep and lambs by 25.9 per cent and poultry by 7.3 per cent; milk fell by 2.4 per cent compared to March while eggs were static but compared to a year earlier milk was up 3.4 per cent and eggs were down 1.4 per cent.
- 2 During May, slaughterings of UK prime cattle rose by 9.3 per cent, compared to a year earlier, to 174,000; beef and veal production was up 2.1 per cent at 79,000 tonnes; sheep slaughterings rose by 8.4 per cent to 955,000; mutton and lamb production rose by 15 per cent to 24,000 tonnes; pig slaughterings rose by 1.8 per cent to 914,000; and pigmeat production rose by 3.7 per cent to 80,000 tonnes.
- 3 During February, the number of new herd bovine TB incidents, on an annualised basis, fell by 5 per cent in England with a fall of 9 per cent in the High risk area but rises of 9 per cent in the Edge area and 22 per cent in the Low risk area; there were falls of 26 per cent in Scotland and 7 per cent in Wales; the number of herds not officially TB free fell by 7 per cent in England with a fall of 12 per cent in the High risk area but rises of 14 per cent in the Edge area and 31 per cent in the Low risk area; and there was a fall of 31 per cent in Scotland but a rise of 5 per cent in Wales.
- 4 Food Standards Scotland has terminated the contract with Hallmark Meat Hygiene and has employed its own Official Veterinarians and meat hygiene inspectors.
- 5 Auctioneers Wright Marshall, which operates Beeston Castle market, has gone into administration.
- 6 The June Global Dairy Trade auction saw overall prices down 3.4 per cent with whole milk powder down 1.5 per cent and skim milk powder down 4 per cent.
- 7 Milk production in May rose by 3.9 per cent compared to April and by 1.5 per cent compared to a year earlier to £1,392 million litres. Average butterfat content fell by 2.2 per cent to 3.96 per cent while average protein content was marginally down at 3.34 per cent.
- 8 During April, UK dairies processed 1,260 million litres, up 0.4 per cent on March. Production of liquid milk was largely constant; cheese production rose by 3 per cent to 42,700 tonnes, butter production rose by 0.8 per cent to 15,600 tonnes, and milk powder production rose by 11 per cent to 9,500 tonnes.
- 9 Researchers at Heriot Watt University and the University of Leon in Spain have concluded that TB prevalence in wild boar was lower when wolves were present but increased in cattle when they were absent.
- 10 During May, UK commercial layer chick placings fell by 16 per cent to 2.7 million chicks; broiler chick placings fell by 2.3 per cent to 84.5 million chicks; turkey chick placings fell by 19 per cent to 800,000 chicks; turkey slaughterings fell by 13 per cent to 700,000 birds; broiler slaughterings fell by 2.3 per cent to 81.3 million birds; and poultry meat production fell by 2.5 per cent to 13.651 million tonnes.
- 11 Scotland's Rural College has opened a new poultry research centre.
- 12 Further outbreaks of African Swine Fever have been reported in China and Vietnam; and Hong Kong has reported its second case. North Korea has reported its first outbreak in domestic pigs.

VIII Inputs/Supply businesses

- 1 The 2018 British Survey of Fertilizer Practice shows that the usage of nitrogen on tillage crops rose to 142kg/ha and sulphur to 35kg/ha but phosphate fell to 27kg/ha and potash to 35kg/ha. On grassland crops the usage of nitrogen was up to 57kg/ha and sulphur to 4kg/ha while both phosphate and potash were unchanged to 8kg/ha and 12kg/ha respectively.
- 2 As a result of global price increases and factory shutdowns, nitrogen prices are £30 per tonne up on the same time last year.
- 3 The Agricultural Price Index for April shows that the cost of all goods and services rose by 0.4 per cent compared to March and by 6.3 per cent compared to a year earlier; seeds rose by 0.1 per cent and 2.2 per cent respectively; energy and lubricants rose by 5.7 per cent and 12.8 per cent respectively; veterinary services rose by 0.1 per cent and 14 per cent respectively; fertilizers fell by 0.4 per cent compared to March but rose 10.9 per cent compared to a year earlier; chemicals were static compared to March but rose 1.8 per cent compared to a year earlier; straight feeding stuffs fell by 1 per cent compared to March but rose 6.9 per cent on a year earlier; and compound feeding stuffs were static compared to March but rose 8.1 per cent on a year earlier.
- 4 Chiltern Farm Chemicals has been given permission to bring a judicial review of Defra's decision to ban metaldehyde slug pellet products on outdoor crops before the High Court.
- 5 AHDB has launched a three-year research programme to improve the control of downy mildew and late blight in horticultural crops. The consortium undertaking the research comprises the James Hutton Institute, University of Worcester, NIAB EMR, Stockbridge Technology Centre and RSK-ADAS.
- 6 A project funded by AHDB, the AgriFood Charities Partnership and Certis Europe and hosted by Harper Adams University is to research the potential of biopesticides and optimising the use of conventional insecticides for cabbage stem flea beetle control.
- 7 Corteva Agriscience has separated from DowDuPont.
- 8 BASF has been granted authorisation for the isopropanol – azole Revysol (mefentrifluconazole) for use in wheat and barley.

IX Marketing

- 1 The UK-China Beef Protocol has been signed which secures market access for UK beef exporters by the end of this year. Estimates suggest exports could be worth £230 millions in the next 5 years.
- 2 The Food and Drink Federation has reported that UK food and drink exports increased by 10.7 per cent to £5.8 billions in the first quarter of 2019. Exports to non-EU markets increased by 12.2 per cent with growth of 9.9 per cent in EU exports.
- 3 The second phase of the Scottish Food and Drink Export Plan, covering the period 2019 to 2024, has been published along with £4.5 millions of funding from the Scottish Government, industry and Scottish Development International. The objective is to double exports to £30 billions by 2030.
- 4 The Consumer Scotland Bill has been published which will establish Consumer Scotland, a new organisation which will work to generate improved service, greater value for money and better buying choices for shoppers.

- 5 The Scottish Government has reported food and drink exports at a record-breaking £1.4 billions in the first quarter of 2019. Beverage exports rose by 16 per cent to £1 billion, fruit and vegetable exports rose by 37 per cent to £21 millions, dairy and egg sales rose by 24 per cent to £17 millions while fish exports rose to £210 millions buoyed by an increase of 41 per cent in sales of salmon
- 6 The Groceries Code Adjudicator's annual survey has placed Aldi top with 97 per cent of suppliers stating the retailer complied well or mostly well with the code. The Co-op was the most improved retailer.

X Miscellaneous

- 1 Defra has published a Code of Practice for the Welfare of Gamebirds reared for Sporting Purposes.
- 2 Research undertaken by Harper Adams University has revealed that, of the estimated 137,000 farmers to have been the victims of crime, 73,000 have been affected more than once.
- 3 A survey has revealed that 83 per cent of Scottish people consider that farming provides an essential public service while 86 per cent believe the industry is vital to the success of the Scottish economy.

Postscripts

Tommy Cooperisms – Part 2

1. A man takes his Rottweiler to the vet. "My dog's cross-eyed, is there anything you can do for him?" "Well," says the vet, "let's have a look at him." So he picks the dog up and examines his eyes, then checks his teeth. Finally, he says, "I'm going to have to put him down." "What? Because he's cross-eyed?" "No, because he's really heavy."
2. Guy goes into the doctor's. "Doc, I've got a cricket ball stuck up my backside." "How's that?" "Don't YOU start."
3. Two elephants walk off a cliff ... boom, boom!
4. What do you call a fish with no eyes? A fsh.
5. Apparently, 1 in 5 people in the world are Chinese. There are 5 people in my family, so it must be one of them. It's neither my mum or my dad. Or my older brother Colin. Or my younger brother Ho-Cha-Chu. But I think it's Colin.
6. Two fat blokes in a pub, one says to the other "Your round." The other one says "So are you, you fat bast**d!"
7. Police arrested two kids yesterday, one was drinking battery acid, the other was eating fireworks. They charged one and let the other one off.
8. "You know, somebody actually complimented me on my driving today. They left a little note on the windscreen. It said 'Parking Fine.' So that was nice."

9. A man walked into the doctors, he said, "I've hurt my arm in several places". The doctor said, "Well don't go there any more."
10. Ireland's worst air disaster occurred early this morning when a small two-seater Cessna plane crashed into a cemetery. Irish search and rescue workers have recovered 1826 bodies so far and expect that number to climb as digging continues into the night.

Monthly Farming Update

I wish I'd wished!

That baffling legal phrase “proprietary estoppel” has reared its head again.

The case of the Habberfield family has been reported before but to refresh:

Frank and Jane had farmed Woodrow Farm since the 1970's. Frank died in 2014 leaving his estate to Jane. However, their youngest daughter claimed that both parents had promised her ownership of the farm when they retired. This was denied by Jane.

In 2018 the High Court awarded Lucy £1.17 millions but Jane appealed.

The Court of Appeal has ruled in Lucy's favour stating ‘underpinning the whole doctrine of proprietary estoppel is the idea that promises should be kept.’

The effect of the case is very sad as Jane, aged 82, will be forced to sell the home she has occupied for over 40 years.

There is no doubt that society is becoming more litigious and this applies increasingly to families. In farming circles, more than most, there is uncertainty as to how the main estate should devolve yet there are often demands from the next generation to provide a degree of certainty.

Openness has its merits but the Habberfield case demonstrates that promised should not be made. What is more, it illustrates how vital it is to record one's intentions in writing, in one's own words, not drafted by a solicitor. If one has a will or a family trust, ensure the legal documents are accompanied by a personal letter of wishes. There is no better evidence of one's intentions.

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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