Soil Association
Food and farming department

Organic action plan consultation meeting:

Yorkshire and the Humber provisional outcomes

20 July 2006, Skipton Auction Mart.

Rural enterprise scheme – GEOrgE project
(Growing England's Organic Regional Enterprise)

To contribute your comments to the planning process please return pages 2 and 3 (if appropriate) to A Rollett in the SAE provided or fax (0117 314 5001)

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Preliminary outcomes from the Yorkshire and Humber consultation meeting (producers/buyers[1] and processors/others[2])

Please indicate your top three priorities (1,2,3) from each section of the table below and return by fax or via the enclosed SAE.
If you wish to add your own priority/priorities please do so on the comment sheet (page 3) and return as above.

What changes or additions to current policy would have the most benefit for the organic sector?
What are the greatest technical issues affecting your organic business and what are the best mechanisms for dealing with these?
What additional market intelligence would be most useful to you?
What do you see as the weakness of the current supply chain structure in your area of organic business and what are the solutions?
In which areas do you see potential for further market development and what support for market development would be most useful?

Policy		**Technical Issues**		**Market Intelligence**		**Supply Chain**		**Market Development**	
Yorkshire and Humber Spatial Strategy to include sustainable food policy[1]		Certification rules limit or hinder producers[1]		More forecasting (trends in the market, processor requirements, predicted shortages)[1]		Lack of collaboration (equipment, transport, knowledge)[1]		Development directed by market intelligence, focus groups, Soil Association[1,2]	
OELS – more education and less paperwork[1]		Lack of labour for short-term contracts[1]		Information about consumer buying trends[1]		Poor communication[1]		To facilitate the above need a study into supply networks[2]	
More education in schools and colleges about organic[1]		Organic feed (high cost and 100% organic requirement)[1]		Identify logistical gaps in the supply chain[1]		No information about those in-conversion[1]		Increase collaboration and communication[1] (a co-operative approach)	
Encourage more conversions [2]		Lack of technical support and advice about organic livestock[2]		Price information for less common crops[1]		No market for in-conversion goods[1]		Organic meals in schools (also expand the organic range on offer)[1]	
Other comments		Weed management (e.g. ploughing in crops/weed control)[2]		Local rather than national information or statistics[2]		Lack of organic wholesalers (to supply organic catering trade)[2]		**Other comments**	
Organic sector small and fragmented[2]				Data that can be used to match up buyers and sellers [2]		Supply/demand imbalance[2]		Is there a need to rethink organic certification for shops[2]	

Comments Sheet

Policy	
Technical Issues	
Market Intelligence	
Supply Chain	
Market Development	

What changes or additions to current policy would have the most benefit for the organic sector?

POLICY	DETAILS
Yorkshire and Humber Spatial Strategy	➢ Should include a sustainable food policy within its remit[1]
OELS	➢ Need to better educate producers about OELS (a lot of misleading information is available about what is and is not permitted)[1] ➢ Day courses at local colleges about OELS were proposed[1] ➢ Reduce the amount of paperwork generated by OELS and by the certification process[1]
Education	➢ Increase the amount of education about organic in schools and colleges[1]
Encourage more conversions [2]	➢ Need to look at market size and demand
Linked-up policy	➢ Organic policy should link-up with other policies, e.g. energy and, health[1]
In conversion producers	➢ Currently a lack of awareness of new entrants to the organic sector[1] ➢ Inform organic producer groups of new entrants to the sector so they can offer help and advice to those beginning the conversion process[1] ➢ Promote organic conversion (e.g. at the Northern Horticultural Symposium), presently there is a mismatch between supply and demand[1]
Local	➢ Ensure local actually means local[1]
Policy support (in general)	➢ Is adequate for the organic sector[2] ➢ Support should be for local production not just organic[2]
European organic standards	➢ There should be equivalence of standards[2]

Other comments

Organic sector small and fragmented[2]	➢ Can't supply the demand for organic[2]
Funding for organic	➢ The organic sector has had a lot of government funding in proportion to the size of the sector[2] ➢ Unclear as to whether this funding had been successful[2] ➢ Support given to the organic sector has not been as effective as it could have been[2]
Supermarkets	➢ Should promote regional produce[1]
RPA	➢ Non payment[1]

NB: In this and all subsequent tables the superscript refers to producers and buyers[1] and to processors, advisors and others[2].

What are the greatest technical issues affecting your organic business and what are the best mechanisms for dealing with these?

TECHNICAL ISSUES	MECHANISM
Certification rules limit or hinder producers E.g. Soil Association ban on the use of copper sulphate for potatoes Ban on multiple suckling or the feeding of milk replacement (calves sold out of the organic sector)	➢ Need for more commercial/more realistic thinking from the certification bodies[1] ➢ A suitable effective replacement should have been found prior to the ban, e.g. resistant species[1] ➢ Should be a change in the certification requirements to allow the use of milk replacement and to allow multiple suckling (as long as these changes were not detrimental to animal welfare)[1]
Lack of labour for short-term contracts (HLS has many jobs that need handwork)	➢ Set up a well run, ethical labour pool in preference to labour gangs[1]
Organic feed (high cost and 100% organic requirement).	➢ YOC could offer a brokerage service that would link arable and livestock producers together to trade feed[1]
Lack of technical support and advice	➢ For small-scale producers[2] ➢ Shortage of good advice with regard to organic livestock[2] ➢ In-depth knowledge of the organic sector is not readily available[2]
Weed management (e.g. ploughing in crops/weed control)	
Issues with organic advisers	➢ Advisers need a wide range of knowledge and expertise[2] ➢ More advisers are needed[2] ➢ Need practical advise (demonstration farms exist but many individuals are too busy to use these resources)[2]
Lack of collaboration	➢ Share expertise and best practice between organic enterprises[1]
Lack of research	➢ Need research into technical problems (e.g. disease control)[1] ➢ More research into the organic horticulture sector[2]
Seed predation by birds	➢ Develop a bird-repellent coating[1]
More technical support for diversification	➢ More support is needed (e.g. arable to horticultural production)[2]
Soil Association	➢ Technical support OK but sometimes difficult to get hold of the correct person[1] ➢ Better utilisation of the online market place and regional trading initiatives[1]
Too much paperwork and record keeping	➢ Should be simplified[2] ➢ Only one inspection[2]

What additional market intelligence would be most useful to you?

MARKET INTELLIGENCE	**DETAILS**
More forecasting	➢ At both the macro and micro level[1] ➢ Information about understanding trends in the market and how to influence those that influence[1] ➢ Producers would like forecast data from processors detailing what produce they are likely to require (information could be used to lead production)[1] ➢ Supermarkets have data to predict growth should be made available and disseminated through producer groups[1] ➢ More forecasting (emphasis should not be on historical statistics)[2] ➢ Predict future problems of supply shortage (particularly for supermarkets)[2]
Information about consumer buying trends	➢ Is there a preference for local non-organic or European organic[2] ➢ Important to know there is a market for a commodity not just a good price[2]
Identify logistical gaps in the supply chain	➢ What is being produced where and how much, and how that product can be utilised by someone else[1]
Price information for less common crops	➢ Up to data and accessed via the Internet[1]
Local information[2]	➢ Local not national statistics[2]
Data to match up buyers and sellers [2]	➢ More brokerage
Accurate data	➢ Essential so that supply and demand can be well matched[1]
European and import data	➢ Statistics with regard to imports from Europe[2] ➢ A summary of the European situation (would large increases in the EU organic land area be reported in the UK?) [2]
More information with better focus	➢ Current market information is too wide spread[2] ➢ More and better statistics to encourage growth and effectively manage that growth[2]
Identify the market for less popular cuts of meat	➢ To allow these cuts to be utilised and/or the market developed[1]
Cereals	➢ More data about the amount of wheat being grown[2] ➢ Information on the requirements for feed cereals[2]
Livestock statistics	➢ Should be broken down in a similar way to arable statistics[2]
Organic conversion	➢ Information about the number of businesses considering organic conversion (broken down into livestock, arable etc)[2]
Soil Association	➢ Need to take advantage of the data that is held by their licensees (not purchase the information again and then utilising it)[1]

What do you see as the weakness of the current supply chain structure in your area of organic business and what are the solutions?

SUPPLY CHAIN WEAKNESS	SOLUTIONS
Lack of collaboration	➢ More sharing of equipment and transport perhaps facilitated by the YOC[1] ➢ Increased brokerage to match up buyers and sellers[1] ➢ Link up restaurants with those who want poorer cuts of meat to ensure a whole carcass is utilised[1] ➢ Ensure retailers deal with one person or body (e.g. producer group)[1] ➢ Need to share information and increase producer co-operation[2]
Poor communication	➢ Good communication is paramount[1] ➢ Should share information, advice, knowledge and marketing expertise[1]
No information about those in-conversion	➢ Identify in-conversion producers to allow producer groups or buyers to offer help and support to find suitable markets and ensure delivery to appropriate specifications[1] ➢ Supermarkets could set up contracts with those in-conversion to allow them to produce to supermarket requirements[1]
No market for in-conversion goods	➢ Potential to establish a market for in-conversion products (but this could be confusing to the consumer faced with organic, non-organic and in-conversion goods)[1,2]
Lack of organic wholesalers	➢ More wholesalers needed to supply the organic catering trade[2]
Supply/demand imbalance	
Lack of support for regional produce	➢ Northern produce should stay in the North[1] ➢ Supermarkets should not promote Cornish milk in Yorkshire but Yorkshire milk[1] ➢ To ensure a regular supply of local produce, consolidation and collaboration is needed[1] ➢ Set up northern franchises (following the model of Riverford)[2]
Fragmented supply chain	➢ Need for a supply chain for whole animals[2] ➢ More vertical integration throughout the chain[2]
Few opportunities to trial goods prior to conversion	➢ Need a method to trial items within retail outlets[1]
Too much red tape and bureaucracy (UK government make things difficult with rules and regulations)	
Organic certification bodies	➢ More co-operation between certification bodies[2] ➢ Make the standards more uniform[2]
Poor contracts	➢ Well designed, long-term, contracts that are able to factor in changes in costs could add stability to the organic market[1]
Distribution[2]	
Cannot sell at a premium to caterers[2]	

Other Comments

The organic sector is blinkered	➢ The sector can be of help to the wider local market[2]

In which areas do you see potential for further market development and what support for market development would be most useful?

MARKET DEVELOPMENT	SUPPORT
Directed development	➢ Use market intelligence to steer the direction of market development[1,2] ➢ Utilise focus groups to identify what consumers want and ensure production meets that demand[1] ➢ Soil Association should ensure that growth in the organic sector is targeted at those areas predicted to show an increased demand[1] ➢ More market intelligence about the supply chain and the horticulture sector[2]
Increase collaboration and communication	➢ Co-operative approach to selling should be encouraged (help to even out the peaks and troughs in market supply and ensure the market is well supplied at all times)[1]
Organic meals in schools (also expand the organic range on offer)	➢ Support to solve problems associated with poor communication between schools, producers and processors[1]
Need a study into supply networks	
Grow existing businesses	➢ More support from Defra to grow organic businesses, in particular, processing[1] ➢ Rationalise delivery and distribution (although as a service is being offered it is necessary to cater for the desires of the customer not just the producer or processor)[1] ➢ Get the basics right to meet future demand[2]
Encourage new entrants	➢ A subsidy system to encourage potential new entrants[2] ➢ More inspirational examples of successful organic businesses and best practice[2]
More education	➢ Increase education and raise awareness[1]
Increase market awareness	➢ Producers need to create demand for organic produce[1] ➢ Organic businesses must be aware of opportunities for selling before any large investment is made[1]
Organic ready/convenience meals	➢ Build the supply chain associated with these products[2]

Other Comments

Certification for shops	➢ Is there a need to rethink this?[2]
Health benefits	➢ Should be promoted, in particular in schools, hospitals and leisure clubs[2]
Wholesalers	➢ Need to stock organic products[2]