



# Organic Farming in Wales

## 1998 • 2003



Canolfan Organig Cymru  
Organic Centre Wales



Llywodraeth Cymru  
Welsh Assembly Government

## Organic Farming in Wales 1998-2003

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Cefnogi Cyswll Fflemio gan Gronfa Arweiniad a Gwarant Amathyddol Ewropeaidd, or Undeb Ewropeaidd Llywodraeth Cymru, Awdurdod Datblygu Cymru/Partnriaeth Bwyd-Amath yn awyranethu allweddol eraill gan gynnwys y Comisiwn Coedwigern, Bwrdd Cosep Cymru, Cynghor Cefn Gwlad Cymru, Asiantaeth yr Amgylchedd Cymru, ELWa a Cymdeithas Llywodraeth Leol Cymru.



Organic Centre Wales is a publicly funded organisation responsible for the dissemination of information on organic food and farming in Wales. The Centre comprises five partners: ADAS Wales, the Institute of Grassland and Environmental Research (IGER), Elm Farm Research Centre (EFRC), the Soil Association and the University of Wales, Aberystwyth.



Cover photos: John Harvey, WDA, Arvid Parry Jones, Jeremy Moore

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## Foreword

*By Carwyn Jones AM, Minister for Environment,  
Planning and Countryside*

The last five years has been a challenging time for organic farming in Wales. There have been successes and setbacks, but overall the sector has remained strong and continued to expand. It has been a period in which Wales has led the way and with the Welsh Assembly Government's support through initiatives like Farming for the Future is now regarded as being at the front of organic thinking.

It is widely accepted that considerable benefits can accrue from organic farming. Among these are greater biodiversity, sustainability of production, reduced usage of chemicals, high levels of animal welfare, and socio-economic benefits due to increases in the level of labour often required. Many consumers are prepared to pay a premium for organically produced food.

This is why the Welsh Assembly Government has remained committed to the development of organic farming as we believe its growth is a fundamental element in creating an economically and environmentally sustainable agricultural industry. We have put in place an outstanding package of support including: grants for conversion, stewardship, marketing and processing; free on farm organic advice

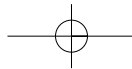
through Farming Connect; a network of organic demonstration farms; and pursuing opportunities with supermarkets to promote and encourage the supply of locally produced organic products.

But perhaps our most significant achievement has been to set up an Organic Centre to support organic farmers by co-ordinating the very best training, access to information and practical advice. Since the Centre's partners started working together three years ago they have built an international reputation for high quality advice on organic matters.

Finally, I'd like to stress the need to see organic and conventional agriculture as interdependent. It is important that the best techniques of both systems are used to ensure the greatest benefits for farmers, consumers and the wider community. Organic farming has much to offer in this partnership and I hope that it will continue to develop and expand in Wales.



Photo: WAG



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Photos: John Harvey, UWA, Jeremy Moore



## Developing Organic Food and Farming in Wales

It was in 1998 that Ron Davies MP, the then Secretary of State for Wales, established three industry working groups to develop action plans for the dairy, red meat and organic farming sectors in Wales. At the time, organic farming accounted for a tiny one-third of one per cent of agricultural land in Wales, so the establishment of the working group, and the subsequent support for the action plan it developed, was a huge vote of confidence in the potential of the organic sector.

With the publication of the Organic Sector Action Plan in March 1999, the working group was restructured to form the Organic Strategy Group, one of four strategy groups and four regional groups forming the Welsh Agri-Food Partnership, serviced and funded by the WDA Food Directorate, which were responsible for steering the implementation of the sector action plans. In 2002, a fifth strategy group, covering horticulture, was formed with an organic horticulture sub-group providing a supporting link to the Organic Strategy Group.

In the four years since the publication of the action plan, there has been significant progress in the development of the organic sector in Wales. Organic

production has increased, established organic producer groups and processing, distribution and retailing businesses have thrived, and many new businesses and initiatives have been established, bringing a greater business, social and cultural diversity to the organic community in Wales.

But there have also been challenges, notably the difficulties faced by milk producers in finding markets for organic milk as a result of the dramatic increase in supplies – this illustrates the need for new initiatives to respond to a dynamic and changing situation as the organic sector develops.

It has been my privilege to chair first the working group developing the action plan, then the Organic Strategy Group since its inception. This report stands as a record of the achievements of the action plan, and the agencies that have supported its delivery. I believe it is a record to be proud of on the part of all involved.



*Gareth Rowlands  
Chair, Organic  
Strategy Group,  
Welsh Agri-Food  
Partnership*



Photo: WDA

# The Welsh Organic Sector Action Plan 1999

The Welsh organic action plan<sup>1</sup> published in March 1999 was the first of its kind in the UK, following the pioneering examples in Denmark, France, Norway and Sweden in the mid-late 1990s. The purpose of the plan was to identify goals for the development of the organic sector in Wales, problems that would prevent the goals being achieved, and solutions to overcome the problems. The main goals of the plan were to:

1. establish the key role of organic agriculture in agricultural and environmental policies in Wales;
2. expand the Welsh organic sector by increasing production of existing and new businesses to 10% of the Welsh agricultural products sector by 2005;
3. exploit fully the growing market opportunities within Wales, the UK and elsewhere.

To achieve these goals, activities in three main areas, in each case targeted at increasing supplies, developing markets and solving specific problems, were envisaged:

- a) **Policy** – establish a Strategic Co-ordinating Body (the Organic Strategy Group) to represent the organic sector in Wales to the National Assembly, supported by three sub groups dealing with the policy, information, and marketing actions – specific actions proposed included the introduction of maintenance payments, identifying opportunities or reducing negative impacts of main commodity measures and closer integration of the Organic Farming and Tir Gofal schemes;

- b) **Marketing** – develop proposals for improving the supply infrastructure as part of a strategy designed to improve the primary marketing of organic produce, assist producers to retain control of supplies and provide support to local and national marketing initiatives, where possible by developing existing producer controlled businesses or establishing new businesses where none currently exist – specific actions proposed included improving links along the supply chain, developing processing capacities with support of processing and marketing grants, and improving marketing intelligence, statistics and consumer research;
- c) **Information** – develop a co-ordinated organic information strategy, integrating research and development, education, training, advisory and other extension activities, through the formation of a 'Centre of Excellence' – specific actions included training and advice for producers and others involved in the sector, improved information for consumers and schools liaison, and research to address technical problems and improve the performance of organic farming.

*Nic Lampkin,  
Director Organic  
Centre Wales and  
Chair of the  
Organic Strategy  
Group's policy  
sub-group*



<sup>1</sup>For further information, see: Welsh Agri-Food Partnership (1999) *Welsh Organic Food Sector: a Strategic Action Plan*. Welsh Food Directorate, WDA, Cardiff. [www.organic.aber.ac.uk/Policy/orgactionplan.pdf](http://www.organic.aber.ac.uk/Policy/orgactionplan.pdf)



## The Assembly's Review of Organic Farming in Wales 2002

In April 2002, the National Assembly's Agriculture and Rural Development Committee undertook an inquiry into organic farming in Wales. Its main aim was to look at future prospects for the organic sector as well as the practical and financial support available to farmers during and after the conversion process. The Committee consulted widely and received written and oral submissions of evidence from a range of bodies and individuals. The final report<sup>2</sup> was launched in February 2003.

The Committee concluded that organic farming is an important part of the Assembly's drive to make Welsh agriculture environmentally and economically sustainable and recommended continued public support for the sector. Organic farming is consistent with the image of Wales as a place producing high quality food in an environmentally friendly way, and there is a strong base to build on through the work of the Organic Strategy Group and Organic Centre Wales as a centre of expert advice and guidance.

The Committee made a number of recommendations, in line with its belief that the development of the sector should reflect market demands with public policy aiming to inform consumers and help Welsh producers identify opportunities and deliver high quality, competitive products to the market, including:

- the introduction of maintenance payments to support farmers after conversion

- the integration of organic farming into the suite of agri-environment schemes
- support for organic producer groups and Organic Centre Wales
- continued support for the marketing of organic produce, including the collection of information all along the supply chain
- promotion of the public procurement of locally produced goods
- consideration of a publicity initiative to inform consumers about organic goods
- using influence to focus research resources on matters of particular significance to Wales

The ARD Committee's report to the Assembly only has advisory status, and does not represent Welsh Assembly Government policy. The then Deputy First Minister and Minister for Rural Wales and Wales Abroad, Mike German AM, indicated in his detailed response in March 2003 that he accepted most of the recommendations and that action was already being taken on several of the issues identified, including the introduction of maintenance payments and continued funding for Organic Centre Wales.

*Glyn Davies AM,  
Chair of the  
Agriculture and  
Rural  
Development  
Committee*



Photo: WAC

<sup>2</sup>For more information on the policy review, the government response and to download the report, *The Future of Organic Farming in Wales*, National Assembly for Wales Agriculture and Rural Development committee, Cardiff, October 2002, see: [www.organic.aber.ac.uk/policy/ARD.shtml](http://www.organic.aber.ac.uk/policy/ARD.shtml)

## The Welsh Organic Farming Scheme (OFS)

The scheme<sup>3</sup> aims to encourage farmers who want to convert land into organic production, increasing the area devoted to organic farming in Wales and promoting a high quality, sustainable system of farming that includes the protection of wildlife habitats and reduces the potential for pollution and other environmental damage as organic farming avoids the use of artificial fertilisers and synthetic pesticides.

The scheme was launched in November 1999, following the closure and review by MAFF (now DEFRA) of the previous England & Wales Organic Aid Scheme (1994-1998). The old OAS scheme had attracted limited uptake due to the very low level of financial support, with most

The new payments represented a substantial increase on the previous situation, but the prospect of the new scheme and the strong interest in conversion as a result of high prices (compared with conventional) for organic meat and milk meant that many producers started conversion simultaneously in late 1999. The scheme closed again in early 2000 while it was re-approved as part of the Welsh Agenda 2000 Rural Development Plan, reopening in the autumn of 2000. But, unlike in England, farmers in Wales were able to start converting without penalty.

Since 2000, the scheme has had a budget of over £3m a year and the Assembly has provided the funding

### Financial support for conversion to and maintenance of organic production in Wales (£/ha total over 5 years)

	Arable	Grassland	Unenclosed
<b>Organic Aid Scheme (1994-1998)</b>			
Standard	250	250	-
LFA	50	50	50
<b>Organic Farming Scheme (1999 onwards)</b>			
Conversion (to 2003)	450	350	50
Conversion (from 2003)	480	390	65
Maintenance (from 2003)	175	175	50

land in Wales only qualifying for less favoured area (LFA) payment rates. The new scheme was similar to that in England in most respects, but less restrictive with respect to limits on the areas that could be claimed and opted for a more flexible definition of unenclosed rather than unimproved land.

necessary to support all farmers who have applied to join. There are currently 548 farms with 46,500 hectares in the Organic Farming Scheme, around 3% of agricultural land in Wales.

### Net annual uptake of Organic Farming Scheme (number of agreements)

1998/99	1999/00	2000/01	2002/02	2002/03
0	254	158	35	101

<sup>3</sup>Organic Farming Scheme explanatory booklet, Welsh Assembly Government, February 2002



Like the previous OAS, there was no provision for ongoing maintenance payments after the 5-year scheme was completed, and producers who had converted previously were not eligible, unlike most EU countries, but introduction of interim maintenance

payments pending a full review of the integration of organic and other agri-environment schemes is planned for 2003. The new payments are expected in Wales from the autumn. For the first time, all certified organic producers will be eligible.

## The Action Plan and Policy Support: Achievements and New Initiatives

Reflecting on the goals and objectives of the 1999 action plan, many of the aims have been fully or at least partly achieved. Organic farming is now well established as part of Welsh agri-environmental and food policy, and strongly supported politically, as indicated by the ARD Committee report and Minister's response. Public investment in the sector has been significant, amounting to over £15 million pounds

over the five years. The share of agricultural land area managed organically has increased from 0.3% in 1998 to 4% by the end of 2002, with the number of organic farms increasing from 120 to 618 over the same period. This represents a substantial achievement, but the sector is still some way from the goal of 10% of the Welsh agricultural products sector by the end of 2005.

Public investment* in the Welsh organic sector (£m), 1998-2003					
Programme	1998/99	1999/00	2000/01	2001/02	2002/03
Organic farming scheme	0.5	3.0	3.1	1.7	2.5
Marketing and processing grants	**	**	**	**	0.8
Organic Centre Wales	-	-	0.2	0.2	0.3
Organic conversion information service (OCIS)	0.2	0.2	0.2	0.1	0.1
Objective 5b (ADAS)	-	0.1	0.1	0.1	-
Objective 5b (WDA)	-	0.1	0.1	0.1	-
Farming Connect Organic Development Programme	-	-	-	-	0.3
<b>TOTAL</b>	<b>1.0</b>	<b>3.5</b>	<b>4.0</b>	<b>2.5</b>	<b>4.0</b>

\*Expenditure from WAG, WDA and EU sources, excluding funders' administration costs

\*\*Specific organic data not available for 1998-2002

Sources: Welsh Assembly Government, WDA, ADAS and Organic Centre Wales

With the main Strategy Group Structures operative since 1999, the introduction by the Welsh Assembly Government and its predecessors of higher levels of support for conversion to organic farming in 1999 and the announcement of the interim maintenance payments in 2003, the key policy-related objectives were achieved at an early stage. The policy sub-group, supported by OCW with a strengthened policy and strategy development remit, remains active in generating responses to consultations, particularly with respect to the CAP mid-term review, and in participating in initiatives to reform and integrate the Organic Farming Scheme with other agri-environment schemes.

The establishment of Organic Centre Wales (OCW) in 2000, and the subsequent integration and improvement of training, advisory and demonstration farm services targeted at producers (including the Organic Conversion Information Service, Objective 5b and Farming Connect funded projects) marked the main achievement of the co-ordinated information strategy objective. In 2003, it was agreed that OCW should extend its focus to public education, public procurement, policy and strategy development, thus providing support to the whole of the organic community in Wales.

Following the rapid increase in production and several new businesses active in Wales, some of the main market-related objectives have also been achieved. But the rapid increases in supply have led to marketing problems in some cases, especially in the dairy sector. There is now an agreed need to focus not just on improving supply co-ordination and processing capacity, but also on the consumer and issues affecting demand for organic products, and this is reflected in recently commissioned work and the new remit for OCW.

Five years on, it is appropriate to take stock of the achievements and failures of the plan and the structures established. A comprehensive review, initiated by the Organic Strategy Group, is taking place in 2003 with the aim of developing a new medium and long term action plan covering the period 2004-2010 and reflecting the new priorities for the development of the organic sector.

Photos: Martin Peck, WDA, Rosie Boden



# Market Growth and Development

## Market overview

According to industry estimates<sup>4</sup>, the retail sales value of the UK organic market has increased from nearly £400 million in 1998/9 to over £1 billion in 2002/03. This has provided a high level of demand for UK producers, but also permitted high levels of imports, so that 65-70% of the UK market is currently met from abroad. The situation varies from sector to sector with a higher degree of UK self-sufficiency for livestock products, and a higher reliance on imports for horticultural products.

There are no data currently available on the size of the Welsh domestic organic market, but research, reported in the following pages, has been commissioned by both the WDA (on consumers) and OCW (on the red meat, dairy and horticulture sectors) as part of their efforts to improve the availability of market intelligence and understanding of key consumer and other trends.

The increase in the UK market for organic products is consistent with global trends, although statistics on the overall size of the market for organic produce in Europe are still very limited<sup>5</sup>. Some recent estimates have suggested that the retail sales value of the

European market for organic food was of the order of 10-11 billion EUR in 2002.

## Organic Strategy Group marketing sub-group

As the organic market matures, so the needs of Welsh organic companies also change. The marketing sub-group has started a programme of supplying Welsh organic companies with the tools they may need for developing the organic market. Some very valuable market research work was jointly commissioned by Wales and southwest England. This was extremely comprehensive, and a targeted condensed version will be made available to Welsh companies.

Contact is being made with all companies who may be involved in marketing asking them what tools they need, and a representative group has been recruited to the marketing sub-group.

Contacts are also being made through the Soil Association with other regional bodies in the UK to help bring some UK-wide planning of organic marketing.

*Bob Kennard,  
Chair of the  
Marketing  
Subgroup*



*Photo: Craig Farm Organics*

<sup>4</sup>Organic Food and Farming Report (annual). Soil Association, Bristol.

<sup>5</sup>Hamm U. et al. (2002) *Analysis of the European market for organic food*. School of Management and Business, UWA.

# Supporting the Marketing of Organic Food

The Welsh Development Agency has made an important contribution to developing the marketing of organic food and providing support for organic producers and processors for more than a decade. Support is available in various forms, including grants, promotional activities, awards and research.

## Grants for processing and marketing



*Knobbly Carrot, who received WDA funding for new organic soup, salad and sandwich-making facilities (£40,000 towards a £100,000 project)*

Over £2 million has been invested in the organic food sector in

the last two years under the WDA's Processing and Marketing Grant (PMG) scheme, which uses a combination of Welsh Assembly Government and European funding. It aims to encourage companies to add value to food produced in Wales. The PMG scheme funds up to 40% of eligible scheme costs in Objective 1 areas and 30% in non Objective 1 areas. The overall investment figure of £2 million therefore comprises £808,952 in grant and the remainder in company investment.

Grants have been given to nine organic agri-food businesses in Wales, including Capestone Organic Poultry, Welsh Hook Meat Centre, the Knobbly Carrot Company, Maes y Felin Organic Poultry, S&J Organic,

Welsh Farm Organics and the Creative Cooking Company.

## Trade development

The WDA has supported organic food companies in exhibiting at trade events across the world. In 2002 and 2003, companies have been able to exhibit under the True Taste brand at specialist organic events, including Organex and Organic Products Europe. Companies also benefit from a wide range of trade development activities which are leading to more and more Welsh organic produce appearing on shelves, including Meet the Buyer events, export seminars and a unique supplier development programme being run with Sainsbury's.

## Consumer research



*Welsh Hook Meat Centre, who received a £300,000 grant to extend their meat processing facilities in Pembrokeshire.*

In 2002/03, a report<sup>6</sup> on organic consumers was commissioned and jointly funded by the WDA with the Soil Association and the South West Food and Drink Association. The objectives of the study were to understand the triggers and barriers to purchasing different categories of organic products, determine frequency of purchase, establish attitudes

<sup>6</sup>Soil Association/Taylor Nelson Sofres (2003) *Organic purchasing triggers*, in press.



*Jonathan and Sally Rees of Welsh Farm Organics, who have built a £120,000 state-of-the-art meat processing unit near Newtown with a 30% grant from the WDA*

to organic foods in general, identify differences in buying between different categories of consumer and assess the influence of origin on consumer perceptions. Initial findings have produced valuable information that will assist Welsh-based organic businesses in developing targeted marketing campaigns for the sector. The WDA will support companies in implementing this marketing activity.

## True Taste/Gwir Flas

Investment and trade development support for the organic sector are backed up by dedicated marketing and public relations activity. The True Taste/Gwir Flas brand for Wales' food and drink industry was launched in 2002 to boost marketing of Welsh produce. The

development of a brand was one of the key tasks that the WDA was set by the Agri-Food Partnership, the industry advisory body.

Underpinning the overall brand position, the first True Taste/Gwir Flas Food and Drink Awards were held in 2002 to celebrate excellence and innovation in the industry. There were seven winners in the Originally Organic category, but organic companies came up as winners in categories across the board<sup>7</sup>. These companies, who are entitled to use the True Taste logo on their packaging, have reported a boost to their businesses due to the high-profile marketing campaign surrounding the awards.

Winners had the opportunity to show-off their produce to a high-profile judging panel, which included chefs, food writers and supermarket buyers. They received extensive media coverage, on HTV, BBC, UK press and the specialist organic press, and benefited from a UK-wide marketing campaign. Winning products have also been on display at the Blas (Taste) showcase which is being run at Cardiff's Old Library by the WDA and Cardiff Council, and which also toured major events in Wales.

*Rachel Rowlands MBE, co-founder of Rachel's Organic Dairy and an organic dairy farmer from Borth, has been involved in promoting food and drink in Wales for more than 20 years. At the WDA's first True Taste food awards in 2002, the judges unanimously decided that she should be awarded the title of Ambassador of the Year, in which role she has represented the industry in Wales and abroad, including a high profile visit to New York to promote Welsh products.*



Photos: WDA

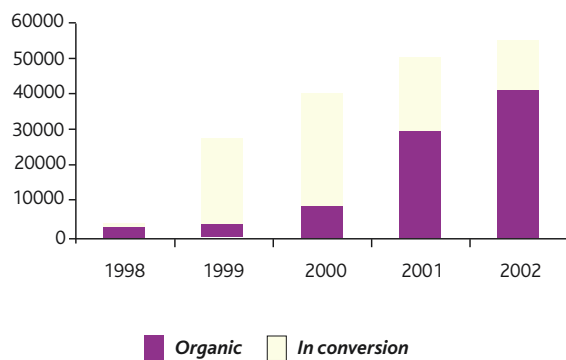
<sup>7</sup>For more information see [www.walesthetrue taste.com](http://www.walesthetrue taste.com)



## Organic Production in Wales

The area of land<sup>8</sup> with organic status in Wales has increased rapidly over the past five years. In 1998 there were just 120 farms, many of them quite small, with a total certified organic area of 3000 ha. By the end of 2002 there were 618 farms with a total of 55,101 ha fully organic or in conversion, representing 3.7% of Welsh farmland. There are now also 103 certified processors and importers in Wales.

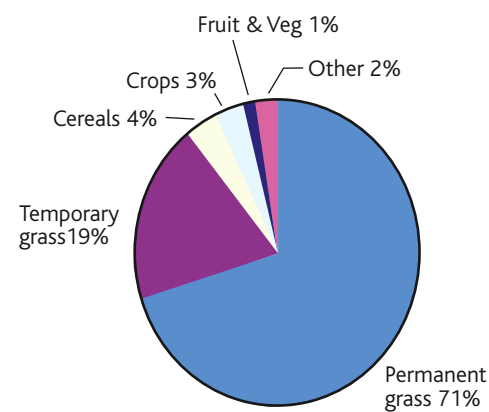
### Organic and in conversion land area (ha) in Wales, 1998-2002



Sources: DEFRA, UKROFS and OCW

Much of this new organic land is associated with beef and lamb production, although dairy expansion has also been significant. Almost 90% (49,000 ha) of all land under organic management is grassland and only 1% (630 ha) horticulture. Cereals and other crops account for a further 7% (3,100 ha) with the remainder woodland, non-crop, set-aside and other land.

### Distribution of organic land use in Wales, 2002



Source: DEFRA 2003

Photo: Aavid Parry Jones, John Harvey, Rosie Boden



<sup>8</sup>For further information on organic production statistics in Wales and the UK, see: [www.organic.aber.ac.uk/stats.shtml](http://www.organic.aber.ac.uk/stats.shtml)



The number of organic livestock has increased correspondingly (see pages 14 and 16), with the main types reflecting the importance of grassland on Welsh organic farms. The total stock kept represents 2-3% of total Welsh livestock in each category, although more than 50% of beef and sheep on organic holdings had yet to achieve organic status by 2002, so that only 1% of all beef and sheep in Wales are fully organic. Although there are number of smaller-scale pig and poultry producers, a few larger-scale producers account for the majority of egg and chicken production.

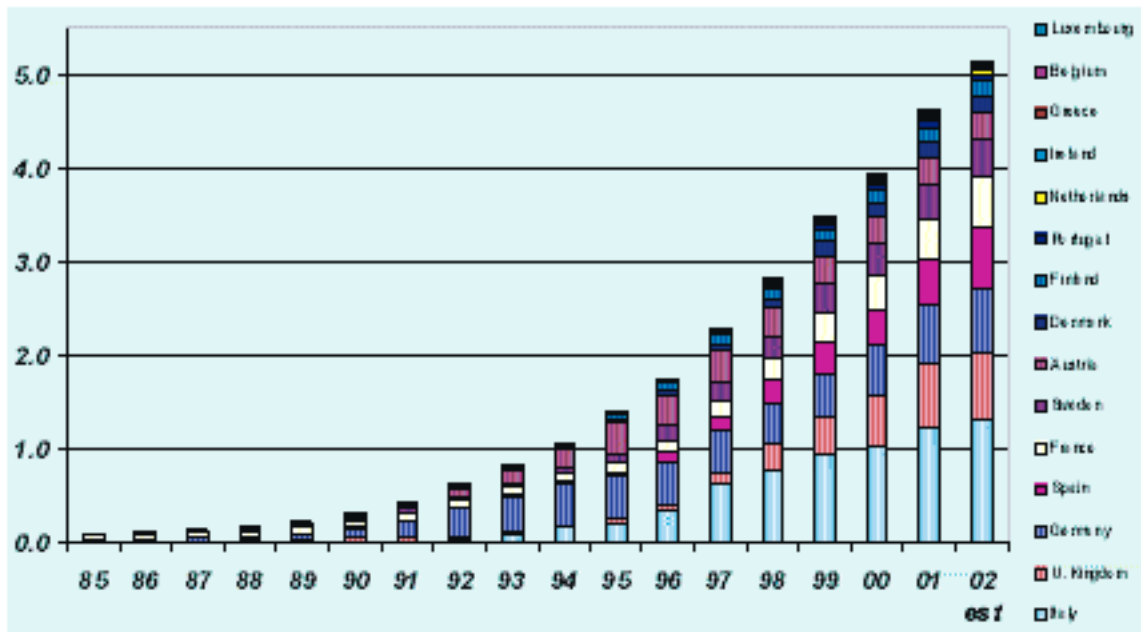
The growth of organic farming in Wales reflects the trends elsewhere in the UK<sup>9</sup>, with the number of organic holdings in the UK increasing from 1462 in 1998 to 4057 in 2002, and the total area from 275 to

725 thousand ha over the same period, representing a similar proportion of the agricultural sector to that in Wales.

In the European Union<sup>10</sup>, certified and policy-supported organic production accounted for 2.8 million ha in 1998, 2.0 % of the total agricultural area. By the end of 2002, this had doubled to over 5 million ha, 4% of the total agricultural area. In the same period, the number of organic holdings has increased from 134 to nearly 170 thousand.

While several European countries are already approaching 10% of their land area managed organically, Wales has at least succeeded in catching up with the European average from a very low starting point in 1998.

### Organic and in-conversion land area (million ha) in the European Union, 1985-2002



<sup>9</sup>For further information on UK statistics, see the annual *Organic Food and Farming* reports published by the Soil Association, Bristol.

<sup>10</sup>For further information on European statistics, see [www.organic.aber.ac.uk/stats.shtml](http://www.organic.aber.ac.uk/stats.shtml)

## The Red Meat Sector

### Production

Beef and sheep farming dominates the Welsh hills, but prior to 1998 there was only one organic livestock farmer in North Wales, and not many in the rest of the country. Dairying, horticulture and mixed farming in south-west Wales had led the way and the organic red meat sector remained relatively undeveloped. This was soon to change as the number of livestock farmers entering organic conversion in Wales rose from less than 20 in 1998 to almost 200 in 1999.

1998 and 2003, with a similar rise in the numbers of organic sheep and lambs. The greatest number of farms entering conversion, almost a third of the total, continues to be in the beef and sheep sector with a high proportion of farms in the larger (over 200 hectare) category. Since there is still a considerable area of land in conversion in 2003, the level of organic red meat production in Wales is set to increase in the years ahead.

**Growth of organic livestock production in Wales, 1998-2002**

	1998/99	2000/01	2002/03
Organic suckler cows	600	1800	2300
Organic cattle > 12 m	800	1400	3400
Organic ewes	8000	25000	50000
Organic lambs/yearlings	12000	35000	65000
Organic sows	-	200	50
Organic laying hens	-	-	45000
Organic table birds	-	-	52000

- no data

Sources: SA/OCW and data collected directly from certification bodies

The long production cycles for red meat, especially beef, meant that under standard conversion rules organic red meat production required a long-term commitment. The introduction in 1999 of 'simultaneous conversion' rules for land and stock considerably shortened this time scale. This plus the new Organic Farming Scheme payment rates, and the collapse in conventional markets following BSE contributed to the dramatic upswing in conversion.

Although 1999 represented a peak, the size of the organic beef-breeding herd rose fourfold between

*Cannon Farm, which is registered with the Soil Association, achieved organic status in 1993. This upland farm of approximately 330 ha supports 40 pedigree Welsh Black cows plus followers, eight Highland cows and 1000 Welsh Hill Speckle Face ewes. It is a member of Graig Farm Producer Group and has won several awards, including the Soil Association's Producer of the Year award in 2001.*



*Nigel Elgar of Cannon Farm*

*Summer 2002 saw the launch of a benchmarking project coordinated by OCW specifically for organic livestock production. With funding from Farming Connect, this has enabled 48 organic beef and sheep farmers across Wales to compare their costs of production with each other and look at their individual business performance on a pence per kg live weight basis. This project is also run in*

*collaboration with MLC, MDC and the Farm Business Survey team in Wales.*



## Market development

The red meat market in organics is divided into two main parts – the direct sales and branded sector, and the supermarket carcass sector. In the first, there have been several recent developments, with both direct sales, internet shopping, farmers' markets and brands developing in Wales, which has been encouraging in terms of the overall market.

However, in terms of volume, the market is dominated (to around 80%) by supermarkets' own-label organic meat. While demand remains steady in both lamb and beef for the multiples sector, here too there have been developments. Work between Graig Farm Producer Group, the Soil Association and various other regional groups within the UK in 2002/03 has produced the Federation of Regional Organic Meat Marketing Groups.

The purpose of this Federation is to bring structure and stability into the organic meat market, by ensuring that processors receive exactly the quality and consistency they require, whilst giving the producer more involvement in the process. The aim is to bring an element of planning into the marketing process both in terms of volumes and prices. The Federation has already made good progress, and is steadily developing. It is hoped that all producers who do not have a market for their produce will sell their organic finished stock through this national network of Regional Producer Groups.

Reports<sup>11, 12</sup> prepared for OCW by the Soil Association in 2003 suggest that the supply of organic red meat is likely to continue to increase during 2004-06, and make recommendations to improve the efficiency of the market. There is general recognition that producer cooperation and better co-operation throughout the supply chain are desirable, and the new Federation and some successful organic red meat marketing models in Wales provide a basis for this. Other areas in which marketing could be improved are Welsh branding, direct sales, developing consumer awareness, and production and processing issues, such as seasonality and abattoir capacity.

*Graig Farm Organics was the winner of the gold award for medium to large producers in the 'Originally Organic' category of the WDA's True Taste Awards 2002. Graig Farm process and market a wide range of organic meats and other produce, all traceable to the farms on which they were produced, selling through*



Photos: John Harvey, WDA

<sup>11</sup>Bassett, A. (2003) *Improving market intelligence for the organic red meat sector in Wales*. OCW/Soil Association. See [www.organic.aber.ac.uk/library/Mlredmeat.pdf](http://www.organic.aber.ac.uk/library/Mlredmeat.pdf)

<sup>12</sup>Bassett, A. (2003) *Organic red meat development in Wales*. OCW/Soil Association. See [www.organic.aber.ac.uk/library/redmeat2003.pdf](http://www.organic.aber.ac.uk/library/redmeat2003.pdf)

# The Dairy Sector

## Production

In 1998 and 1999, organic dairy production was a very attractive proposition – organic farmers were receiving 29.5 ppl, while their conventional counterparts struggled to make an annual average price of 19 ppl. Demand for organic dairy products was strong, and conventional buyers entered the organic market, encouraging farmers to convert with an offer of 31.5 ppl for 6 months.

As a result of these factors, as well as the improved financial support to converting farmers under the Organic Farming Scheme, many dairy farmers began conversion in 1999 and 2000. Between 1998 and 2002, the number of organic farms with dairy enterprises in Wales increased from 30 to nearly 150, and the number of organic dairy cows from 900 to 5100, with up to 2000 other cows managed conventionally on organic farms. This represents an increase from 5 to over 30 million litres of organic milk produced in Wales, with the potential for a further 10 million litres on existing holdings.

Similar trends occurred at the UK level, with production rising to 218 million litres in 2001<sup>13</sup> (rising to more than 250 million litres in 2002), but 27% of dairy herds on organic farms were not certified as organic, and 81 million litres (37%) were being marketed as organic (rising to 116 million litres in 2002). A major consequence is that organic milk producers have had to accept lower prices, either directly or as a consequence of a proportion or all of their milk not being marketed as organic.

With very few dairy farmers now converting, as the current poor returns under a high cost production system become apparent, there are clear signs that the surplus production is falling, in part due to some producers converting from organic milk to meat production, and others giving up organic farming. However, many are still feeding their herds conventionally and are therefore not producing organic milk, but have the potential to do so quickly should the market improve.

**Growth of organic milk production in Wales, 1998-2002**

	1998/99	1999/00	2000/01	2001/02	2002/03
Organic farms with dairy enterprises	30	49	147	145	140
Organic cows	900	1500	2260	5200	5100
Organic milk marketed (million litres)	4	6	10	20	36
Potential additional supply (million litres)*	-	-	-	10	5-10

\* based on 1500-2000 non-organic or in conversion cows in 2002

Sources: MDC<sup>13</sup>, SA/OCW<sup>14</sup> and data collected directly from certification bodies

<sup>13</sup>Padel, S. et al. (2002) *Market prospects for organic milk*. Milk Development Council. See [www.organic.aber.ac.uk/library/marketmilk.pdf](http://www.organic.aber.ac.uk/library/marketmilk.pdf)

<sup>14</sup>Hancock, J. & R. Haward (2003) *Improving market intelligence for organic dairy production in Wales*. OCW/Soil Association. See [www.organic.aber.ac.uk/library/MI/dairy2003.pdf](http://www.organic.aber.ac.uk/library/MI/dairy2003.pdf)

*Groes Bach, a 96 ha farm in Denbighshire, carries some 95 dairy cows and followers. It is registered with Organic Farmers & Growers and achieved organic status in June 2001, marketing through Calon Wen. Since starting conversion they have been pleasantly surprised at the productivity of both land and herd and believe that organic farming could be successful on most family farms in Wales, as long as prices recover soon.*

*Iwan Wynne Jones  
of  
Groes Bach*



*OCW's benchmarking project, which enables farmers to compare their costs of production on a pence per litre basis, has benefited many farmers, including an active discussion group of organic dairy farmers in Carmarthenshire. Eight dairy farmers provided their costs of production for discussion and analysis by specialist staff. The project is currently working with nine different livestock discussion groups across Wales, helping them to improve their performance.*



*Image supplied by Warmilght Photography, © ICER*

## Market development

As indicated above, marketing of organic milk in 1998/1999 posed very few problems for the dedicated organic milk buyer, OMSCo Wales, or the conventional processors who encouraged their producers to convert and continued to supply to their existing buyers. However when undersupply turned into oversupply in 2001-02, the picture changed considerably.

Various initiatives to market this increasing surplus began. Established Welsh processing companies, such as Rachel's Dairy, have experienced significant growth and new processors, including South Caernarfon Creameries, have entered the market. The Welsh organic dairy farmers' co-operative Calon Wen began milk collection in the summer of 2000. Smaller quantities of milk are being marketed in a variety of ways through farmer collaboration, such as Trioni (Three Farms Milk) who contract process and cartonise milk and deliver to mainly local outlets, and Classic Organic who are producing flavoured milk drinks targeted at schools, as well as individuals who have begun making various organic cheeses. New organic cheeses have also been developed by a range of farmhouse cheese producers.

These initiatives are beginning to have an impact on the surplus problem, helped by increasing substitution of imports with home produced goods, but pricing strategies remain an issue which some consider to be undermining the potential for increasing sales.

*Caws Cenarth won the gold award for small to medium processors and manufacturers in the 'Made to Taste Better' category of the WDA's True Taste Awards 2002. Caws Cenarth, established in 1987, make a range of organic cheeses including Perl Las and Perl Wen.*



*Photos: John Harvey, WDA*



## The Horticulture Sector

### Production

Organic horticulture has been at the heart of the development of organic farming in Wales, with pioneering Welsh growers responsible for the founding of key organisations in the history of the UK organic movement. While its relative importance in Wales has decreased as other sectors have grown, it is still a strong sector, with 630 ha of fruit and vegetables on about 160 holdings under organic management in Wales in 2002.

In 1999, the National Assembly for Wales commissioned a report from the Scottish Agricultural College in 1999 to review the 'alternative' agricultural sectors to identify which could provide the most benefit to the Welsh rural economy. Organic horticulture received a favourable assessment and, in 2002, an organic horticulture sub-group was established that would report to the Organic Strategy Group. There is now also a Horticulture Strategy Group including organic sector representation.

The support from these groups enhances the services available to growers from Organic Centre Wales, OCIS and Farming Connect. In 2002, a development farm was set up at the Welsh College of Horticulture to carry out a programme of trials and development looking at rotations, organic seeds and disease resistance in potatoes, supplementing the research carried out by HDRA and others elsewhere in the UK. Technical guides featuring some of this research are available through OCW and grower workshops have been held across Wales.



Photos: ADAS, John Harvey, WDA

*Blaencamel, a 45-acre farm in Ceredigion, has been managed organically since 1974.*

*Vegetables are grown on 12-15 acres, including 1 acre of greenhouses. The farm used to produce for local outlets but has moved to growing mainly for supermarkets, via Organic Farm Foods in Lampeter. A controlled microbial composting system was set up two years ago, and Blaencamel are experimenting with compost teas to control diseases.*



*Composting at Blaencamel*

*For the fourth time, the Loraine Award for Nature Conservation and Organic Farming has gone to a Welsh producer. In 2002, Liz Findlay, who farms 30 acres at Llanilar in Ceredigion, impressed the judges with the range of habitats and wildlife on her land, which includes woodland, wetland areas, species-rich pasture and mature trees and hedgerows, besides an acre of vegetables and soft fruit. The Award was previously won by Martin Peck in Powys, Cliff Carnell in Carmarthenshire, and John and Peter Morris of Pembrokeshire.*

*Liz Findlay*





## Market development

In Wales, organic horticulture has played a major role in developing the organic market – in 1985 Welsh organic carrots were the first organic produce to appear on a UK supermarket shelf. Organic vegetables from Wales took a significant proportion of the UK market in the early 1990s, although this proportion has fallen in recent years because of increased production elsewhere. Welsh producers and a major packing company, Organic Farm Foods at Lampeter, have been in the forefront of this development.

There has been concern about the level of imports, particularly during the main UK production seasons. Figures of 70-85% imports have often been mentioned, but a recent study shows that if fruit is removed from the equation the UK horticulture market is more than 50% self-sufficient. The study concluded that there is potential for a further 10% import replacement on top of future market expansion – a reduction from the heady days of 40%+ annual growth in 1999 and 2000, but still significant growth potential.

As Welsh supply has grown, and with competition from England, Scotland and imports, many producers have learnt the hard way about the potential risks as well as benefits of supplying mainstream outlets. The need to communicate with packers before planting is critical, in order to plan production to meet the market, but even this does not guarantee high prices or protect against losses due to high gradeouts or crops not being marketed. Despite some of the problems, packers are looking to increase the supply of Welsh organic produce further and are implementing programmes to achieve this.

The number of farmers' markets, people buying through box schemes and community-supported agriculture initiatives has increased over the last five years. Initiatives such as the True Taste Awards and food festivals are helping to communicate the message that local food is not only fresh and full of flavour, but it also brings considerable benefits by cutting down on food miles and stimulating local economies.

Organic Centre Wales has commissioned a market intelligence report on organic horticulture funded by Farming Connect. This aims to identify the strengths and opportunities for Welsh producers of organic fruit and vegetables. It will also identify mechanisms for growers to access price and availability information though these are notoriously difficult areas in which to achieve accuracy. One of the best ways forward is likely to be the setting up of an information exchange network of growers into which information from the wider marketplace can be fed.

*Gellirhyd Farm,  
near  
Crickhowell in  
the Black  
Mountains, won  
gold in the  
Originally  
Organic*



*category for small to medium producers in the True Taste Awards 2002 for their Gellirhyd organic apple juice, available in 35 varieties. The apples come from the farm's old orchard, planted over a century ago, and the farm also produces charcoal and hay.*

Photo: WDA

<sup>15</sup>Firth, C. et al. (2003) *The UK Organic Vegetable Market*. Ryton, HDRA

# Organic Centre Wales

## Aims and objectives

Organic Centre Wales (OCW) was established in 2000 as a focal point for the dissemination of information on organic food and farming to producers and other interested parties in Wales. Its establishment fulfilled a key objective of the Welsh action plan for organic farming, with a remit to support the achievement of the action plan goals, and in particular the delivery of a co-ordinated information strategy.

In its first phase (2000-2003), OCW focused primarily on meeting the needs of producers, particularly those converting to organic farming, by providing a helpline, training, advice, extension via demonstration farms, and other information sources and by collating information on research and research needs, making it available through the website and bilingual publications. OCW also responded to policy consultations on behalf of the Organic Strategy Group. The activities of OCW during this period are described in more detail in the following pages.

The funding for OCW comes from the Welsh Assembly Government (WAG) and Farming Connect (with additional support from the European Union EAGGF Objective 1 funds) to carry out the co-ordination functions, with additional funding for delivery through a separate WAG Organic Conversion Information Service (OCIS) contract, the Farming Connect Organic Development Programme and, previously, European Objective 5b funding.

With the rapid increase in supply of organic products and the marketing pressures that this has generated,

the policy emphasis has shifted from encouraging supply to supporting demand-stimulating measures including public education and public procurement. As part of the Minister's response to the ARD committee report on the future of organic farming in Wales (see page 5) Organic Centre Wales was awarded a further £240,000 p.a. funding for 2003-2006, with a particular remit to extend its information service provision from meeting the needs of producers to the whole supply chain, including service providers. It will service consumers and other interested parties and support the strategic development, capacity building and policy development needs of the organic community in Wales.

The aim of OCW has therefore evolved to support more generally the achievement of the Welsh Organic Action Plan objectives, and the agencies involved in implementing the action plan, by co-ordinating and supporting services to the organic community in Wales. This will include acting as a focal point for gathering data and disseminating information on organic food and farming and providing a focus for policy and strategic development, including market development, supply chain facilitation and public procurement. In doing so, Organic Centre Wales aims to achieve a level of excellence that justifies it playing a leading role, not just in Wales, but also in the UK and internationally.

*Andrew Jedwell, Chair  
of the Organic Centre  
Wales steering group*



## Partnership, staffing and management 2002/03

OCW is based at the University of Wales, Aberystwyth and is run by a partnership of five organisations actively involved in organic farming research and knowledge transfer in Wales: ADAS Wales, Elm Farm Research Centre (EFRC), the Institute of Grassland and

Environmental Research (IGER), the Institute of Rural Studies at the University of Wales, Aberystwyth (IRS) and the Soil Association. OCW core staff are responsible for the co-ordination of the different areas of activity, with the partners responsible for much of the delivery of services to producers and others.

The lists below refer to the period 2002/3; not all are current.

Staff Canolian Organig Cymru	OCW Steering Group
<p>Nic Lampkin, Director Neil Pearson, Manager Sue Fowler, Policy and Development Officer Rosie Boden, Knowledge Transfer Officer Carolyn Wachter, Training and Events Co-ordinator Tony Little, Advisory Services Co-ordinator Phil Jones, Helpline Officer Jane Powell, Information Officer Andrew Jackson, Benchmarking Officer Pat Elkins, Secretary</p> <p><i>OCW Associate Staff</i></p> <p>David Frost, ADAS Roger Hitchings, EFRC Heather McCalman, IGER Gwasanaethau Cynhyrchu, Soil Association</p>	<p>Andrew Jedwell, Chair Alan Starkey, Welsh Assembly Government Anwyn Davies/ Kevin Thomas/ Gwewir Price/ Lisa Penny, Welsh Development Agency Richard Weller/ Bryan Evans/ Heather McCalman, IGER Duncan Gardner, Llantura Hilary Miller, Countryside Council for Wales John Davies, Food Centre Wales John Cook/ Richard Collyer, ADAS Phil Stocker, Soil Association Jo Banks, ELWA Louise Owen, Young Farmers Club Meinir Pasko, Antur Teifi Trystan Edwards, National Trust Neil Pearson, Manager, OCW Nic Lampkin, Director, OCW Nigel Elger, Farmer/ Graig Farm Producers Roger Hitchings, Elm Farm Research Centre Tom Lutter, Farmer/ NFU Cymru Bryan Walters, Farmer/ FUW</p>
OCW Management Group	
<p>Nic Lampkin, Institute of Rural Studies, UWA and Director, OCW Neil Pearson, Manager, OCW John Cook, ADAS Phil Stocker, Soil Association Richard Weller, IGER Roger Hitchings, EFRC</p>	

## Advisory Services

Until 1996, there was no publicly-funded advice in the UK on conversion to, or continued, organic management. Since then, a range of services has been developed, providing initial information to farmers considering conversion, detailed business planning and specialist technical advice. These services have been made possible by financial support directly and indirectly from the Welsh Assembly Government (WAG) and from the European Union through Objective 5b programmes and Farming Connect.

The services are provided by consultants accredited both by Organic Centre Wales with respect to organic farming competence<sup>16</sup>, and by Lantra and WAG with respect to consultancy and business competence. The consultants come from OCW partner organisations (ADAS, EFRC Organic Advisory Service and IGER) as well as other consultancy groups (Gaia Professional and Abacus Organic Associates).

### Organic Conversion Information Service (OCIS)

OCIS Wales was launched in October 1996 and aims to provide farmers considering conversion with the information they need to make an informed decision on whether or not to convert. The service is funded by WAG and includes a helpline and information pack provided by OCW and up to two free advisory visits delivered by ADAS and the EFRC Organic Advisory Service.

*Philip Jones,  
Helpline  
Officer  
at OCW*



Photo: Tony Little

OCIS was managed by ADAS until April 2002 when responsibility was transferred to OCW. The helpline (01970 622100), previously operated by the Soil Association, was transferred to OCW in January 2001 to provide a more Welsh focus and a bilingual service.

Since its launch in Wales in 1996, some 3657 farmers have registered with the service (13% of the total number of holdings in Wales). A total of 2935 advisory visits have been delivered to 1929 farmers. Enquiries have come from all areas of Wales and from all sectors<sup>17</sup>. The majority of farms visited were beef and sheep enterprises followed by dairy, although the recent marketing and oversupply problems have reduced interest from the dairy sector to a trickle in 2002/03.

A review<sup>18</sup> of OCIS in October 2001 identified a number of directions the service should take, including access to detailed planning advice and support, strengthening of the marketing, financial, animal health/welfare and environmental elements of OCIS, and provision of 'post OCIS' support. Changes to OCIS and the creation of effective links to other projects and services, principally through Farming Connect, is enabling many of these issues to be addressed.



<sup>16</sup>OCW Factsheet 5. *Register of accredited organic advisors*. See [www.organic.aber.ac.uk/library/factsheets/ADVISORSEw.pdf](http://www.organic.aber.ac.uk/library/factsheets/ADVISORSEw.pdf)

<sup>17</sup>A detailed statistical evaluation of OCIS from 1996/7-2001/2 has been produced by ADAS: Frost, D. et al. (2002) *Information and conversion – OCIS in Wales, 1996-2001*. ADAS, Pwllpeiran. [www.organic.aber.ac.uk/library/ocisinwales.pdf](http://www.organic.aber.ac.uk/library/ocisinwales.pdf)

<sup>18</sup>OCW (2001) *A review of the Organic Conversion Information Service (OCIS) in Wales (1996-2001)*. At [www.organic.aber.ac.uk/library/OCISreview2001.pdf](http://www.organic.aber.ac.uk/library/OCISreview2001.pdf).

## Conversion and business planning advice

From 1999 to 2001, 50% grants for conversion planning and related advice and a free Business Financial Health Check, were available, funded under the EAGGF Objective 5b Organic Development Programme led by the WDA. Thirty-five farmers benefited from this service.

Since 2001, most of the publicly-funded advice to farmers (organic and conventional alike) has been available through Farming Connect, financially supported by the Welsh Assembly Government and European (EAGGF) Objective 1 funding. OCW, working with WAG, is responsible for the quality assurance of the organic advice delivered.

Farming Connect provides a Farm Business Development Plan (FBDP), which looks at future directions, explores avenues for improving farm income and identifies training needs. The service includes an opportunity for farmers to prepare a detailed plan<sup>19</sup> for conversion to organic systems, covering both technical and financial aspects. Of the 5827 FBDPs completed to date, 125 have been related to conversion to or development of organic systems.

## Specialist technical advice

Farming Connect also provides for a free day of technical advice to support the business plan. Topics of advice requested to date include livestock housing to meet organic standards, maintaining soil fertility, clean grazing rotations for beef and sheep, grassland management, organic certification bodies and record-keeping. To date, 38 days of organic technical advice have been provided under this service.

## IGER Grassland Technology Transfer Project (GTTP)

IGER has been running an extension programme in Wales since 1999, which includes a specialist organic element. Crop rotations are limited in much of Wales, an area where grassland predominates, and adapting systems to meet the challenges of organic standards is important. The project has combined traditional extension practices with concepts like the Focus Farm Group network, based on the successful New Zealand Monitor Farm Programme. The level of interest in organic farming is reflected in the fact that 32% of farmers on the GTTP database have an interest in the organic programme.

Activities include one-to-one advisory visits, discussion groups and demonstration farms, training days, factsheets, the bulletin 'Organic Grass Focus'<sup>20</sup>, a Grassland Enquiry helpline and articles. Two Focus Farm Groups have been established, one centred on a beef and sheep farm and another on a dairy and cropping farm, and topics covered include soil structure, fertility management, nutrient budgets, standards issues, rotation planning, and weed control. Field-scale projects have also been undertaken on the Focus farms, including the use of red/white clover leys, and organic seed. These activities, originally funded by the IGER-led EAGGF Objective 5b Grassland Technology Transfer project have since 2001 been part of Farming Connect.

*Bryan Evans of IGER and a silage clinic at a demonstration farm event*

Photos: Rosie Boden



<sup>19</sup>OCW Factsheet 1: *Organic conversion information/advice and Farming Connect*. See [www.organic.aber.ac.uk/library/factsheets/FBDPOCISeng.pdf](http://www.organic.aber.ac.uk/library/factsheets/FBDPOCISeng.pdf)

<sup>20</sup>See [www.organic.aber.ac.uk/Grass%20Focus/index.html](http://www.organic.aber.ac.uk/Grass%20Focus/index.html)



## Discussion Groups and Demonstration Farms

Discussion groups and demonstration farms are the main vehicle for more general group-based extension work. The OCW co-ordinated Welsh network builds on the experience of OCW's partners operating similar networks in England and Wales, with financial support from WAG and EAGGF Objective 5b (1999-2001), and EAGGF Objective 1 sources through Farming Connect since 2002.

### The Cambrian Organic Group

The Cambrian Organic Group (COG) was set up in 1996 by ADAS with the help of EAGGF Objective 5b funds. This farmer group met regularly for three years and arranged a programme of farm walks and talks by visiting speakers. COG also published a regular newsletter to promote communication between organic producers in Wales and held regular courses for farmers interesting in 'planning the conversion' to organic farming.

From 1999 to 2001, the project was taken a step further when additional 5b funds were used to employ two facilitators and to set up regional producer groups throughout Wales. Inaugural meetings were held in January 2000 in each of the six regions. The six COG groups that emerged comprised organic producers, representatives from bodies such as LEADER, the Agri-Food Partnership and other local groups. Over the next two years, COG staged 70 evening meetings and farm walks tackling a wide range of technical issues from pigs and permaculture to managing grasslands and marketing organic produce. During this period the bi-monthly COG Newsletter and its 'event sheet' became a focal point for information on events relating to sustainable agriculture in Wales.

The separate ADAS Objective 5b Quality Beef in Wales project included a successful organic discussion group and related organic demonstration farms at Cefn Llech, near Rhayader, and Frongoch, UWA. The group held a wide range of open days and meetings with invited speakers and the two project reports contained detailed analyses of organic beef production in Wales.

The COG experience was reviewed in detail at the end of 2001<sup>21</sup>, providing the basis for the eventual development of similar initiatives with Farming Connect support in 2002/03, enabling some but not all of the original COG groups to be continued.

### Farming Connect discussion groups

Farming Connect has created the opportunity for a new network of organic discussion groups to become established. Funding for events and administrative support from Farming Connect is available through OCW. In 2002/03, there were six independent regional or specialist groups: Northwest Organic Growers, Pembrokeshire Organic Group, the Nags Head Group in Carmarthenshire, Mid-Powys Group, Monmouth Dairy Group and Monmouth Beef and Sheep Group. Two commercial groups, Graig Farm Producers and Cambrian Organics, with eight sub-groups between them, also receive support. Events are chosen and arranged by the groups themselves and have included visits to members' farms, a visit to Duchy Home Farm, meetings with homeopaths, a visit by IGER staff, and talks on a variety of topics from hemp, slurry management and meat marketing to scrapie.

<sup>21</sup>Lampard, J. and C. Porter (2002) *Developing the infrastructure for organic farming in Wales. Project Evaluation January 2000 - December 2001*. ADAS Pwllpeiran. See [www.organic.aber.ac.uk/library/cogreview.pdf](http://www.organic.aber.ac.uk/library/cogreview.pdf).



## Demonstration farms

The first Welsh network of organic demonstration farms was set up by OCW with EAGGF Objective 5b funding in 2000. These were Ty Gwyn (IGER), Llanerchaeron (National Trust), Bryn Cocyn, Pwllpeiran (ADAS), Cefn Llech, Cannon Farm, Frongoch (UWA), Penrhiw, Groes Bach, Porthamel and Rogerswell. Farm walks and a range of technical events for farmers were held on these farms, providing an opportunity for conventional farmers to see organic farming at first hand, and for all farmers to learn more about organic techniques. In 2001, the foot and mouth epidemic put a stop to all farm events, and a decision was taken to produce a video<sup>22</sup> involving the demonstration farms instead.

With the advent of Farming Connect in 2002, a new network of commercial demonstration farms was established. So far, four farms are currently active: Porthamel, Anglesey (beef, sheep, poultry, vegetables), Cannon Farm near Welshpool (upland beef and sheep), Groes Bach, Denbighshire (dairy) and Maesterran near Machynlleth (beef and sheep). Four more farms are in the establishment phase and two more are planned for the future, covering a range of enterprises, including eggs, arable and horticulture.



There are also currently three institutional development farms: ADAS Pwllpeiran organic hill beef and sheep unit, IGER's Tŷ Gwyn organic dairy unit, and the Welsh College of Horticulture's organic unit in Flintshire (salads and vegetables, both field and polytunnel).

Since the Farming Connect programme started, 11 events have been held on demonstration farms and seven on development farms, attended by some 1200 farmers.

*Gareth Williams farms at Porthamel Home Farm, a 39 ha farm situated on Anglesey overlooking the Menai Straits. The farm consists of a Welsh Black suckler herd, a flock of mainly Texel breeding ewes and 250 laying hens alongside field vegetables and polytunnels. The farm achieved organic certification from the Soil Association in 1999 and is working with Menter Môn to develop local processing and marketing opportunities.*

*Porthamel Home Farm*



Photos: IGER, Rosie Boden

<sup>22</sup>Thinking of going organic? Video available from OCW

## Training Courses and Events

### Technical training courses

The provision of training courses for farmers on technical issues relating to organic production has been central to the services delivered to farmers by OCW. During 1999-2001 a total of 52 courses attended by 450 farmers were held under two EAGGF Objective 5b funded Organic Farming Projects, one managed by ADAS Pwllpeiran and the other by the WDA, although the programme was cut short by foot and mouth disease. Since 2002, with Farming Connect funding, OCW has organised a further 30 courses, reaching more than 500 farmers.

The experience with producer training courses has been evaluated as part of the review of the Cambrian Organic Group 5b programme<sup>23</sup>. The most popular topics were the management of crops and grassland, with courses on permanent pasture, forage crops and soil fertility all being well attended. Subjects relating to animal health were also favourites, with courses on homoeopathy, animal health plans, faecal egg counting and parasite control run in a variety of venues around Wales.

### Professional development courses

Sixteen continuing professional development courses involving other organisations and companies which provide services to organic producers have also been

organised, including veterinarians associated with the South Wales BVA, NatWest Bank, CCW Tir Gofal officers, Trading Standards officers, Farming Connect facilitators, employees of Wynnstay Farmers and the Women's Farming Union. Courses are also organised for OCW accredited consultants as part of the Farming Connect quality assurance process.

### One-stop shops

The introduction of organic one-stop shops at venues around the country was a new idea designed to provide an opportunity for farmers to talk to representatives of the organisations involved in the provision of organic advice, certification and financial support without having to make an appointment. The events were supported by representatives of the Welsh Assembly Government, the Soil Association, Organic Farmers and Growers, ADAS, Organic Advisory Service, IGER, Tir Gofal, WDA and other organisations. Eight one-stop shops have been held, attracting a great deal of interest with about 40 farmers on each occasion.

*The WDA True Taste stands at Organex and Olympia*



Photos: WDA

<sup>23</sup>Lampard, J. and C. Porter (2002) *Developing the infrastructure for organic farming in Wales. Project Evaluation January 2000 - December 2001*. ADAS Pwllpeiran. See [www.organic.aber.ac.uk/library/cogreview.pdf](http://www.organic.aber.ac.uk/library/cogreview.pdf).

## Official opening of OCW and visit from HRH Prince of Wales

Following the official opening of Organic Centre Wales by the National Assembly Secretary for Agriculture and Rural Development, Christine Gwyther AM, on 20th June 2000, Organic Centre Wales was honoured to receive a visit from HRH The Prince of Wales the following year, on 20th July 2001. After a brief visit to the Farmers' Market in Aberystwyth, Prince Charles attended a small reception, to which members of staff, partner representatives, farmers and others were invited. Farmers who had been through the process of conversion reinforced the poster presentations of OCW's work and HRH showed a great deal of interest and understanding.



## Conferences

The Welsh Organic Food and Farming Events held in Haverfordwest in the autumn of 2000 and 2001, organized by Organic Wales Ltd with input from OCW and financially supported by the WDA, WAG and commercial sponsors, brought together some 200 producers, organic businesses, speakers and others from the organic sector on each occasion. A similar event planned for October 2002, jointly organised by OCW, the Soil Association and Organic Wales Ltd, had to be cancelled, but has been reorganised for October 14th 2003 at Builth Wells. The Food, Health,

Landscape and Culture conference held in Cardiff in September 2001, organized by the Soil Association with OCW, put organic farming in a wider context of public and policy concerns.

OCW organised and hosted the UK Organic Research 2002 conference at the University of Wales, Aberystwyth in April 2002 (see page 28).

## Shows, food festivals and trade fairs

OCW and its partners have been represented at many agricultural events throughout Wales since 2000, including three regional shows: United Counties, Anglesey Show and Ffair Ffermio. In 2002, OCW co-ordinated a new Organic Food and Farming Centre in the Countryside Care Area at the Royal Welsh Show, and OCW and some of its partners also took a stand at the Winter Fair in 2001 and 2002. OCW has also attended the Welsh Sheep and Dairy events.

Organic producers have been well represented at food fairs and festivals around Wales, of which some 45 are now held during the summer months, sponsored by the WDA. Through the WDA, Welsh organic businesses have been represented at the Natural Products Exhibition at Olympia and Organex, and some Welsh organic companies have been present at BioFach, the German international organic trade fair.

In March 2003, Organic Wales Ltd organized the Welsh Organic Food Experience in Cardiff, a one-day trade fair for organic businesses to promote their products to buyers and the public, again with financial support from the WDA and commercial sponsors.

## Research and Development

Research on organic agriculture is conducted at several institutions in Wales, including ADAS, IGER and the University of Wales. This research is typically funded by the EU or DEFRA on a UK wide basis, with the UK research councils beginning to make additional resources available. The Welsh Assembly Government and the WDA play a very limited role in funding research and Organic Centre Wales is not directly involved in conducting research, being more concerned with the dissemination of research results and the identification of research priorities. However, a limited number of development projects co-ordinated by OCW are supported by the Farming Connect Organic Development Programme.

### Organic milk – conversion, economics and production strategies

Organic milk production has been researched at IGER's Tŷ Gwyn organic dairy unit near Aberystwyth since 1992, in collaboration with the Institute of Rural Studies. The first two phases, funded by DEFRA and the EU, involved following Tŷ Gwyn and ten commercial dairy farms through conversion and beyond, monitoring their production and economic performance.

Since 1998, researchers at IGER and IRS have been comparing two systems of production, one taking a self-sufficient approach in which all the feeds are grown on the farm, and the other buying in organic concentrates. Summary results are being prepared as technical guides by OCW<sup>24</sup>.

### Hill and upland beef and sheep

During the 1990s, organic research at ADAS Pwllpeiran, Ceredigion, concentrated on comparing the organic unit to the rest of the farm in terms of animal production, environmental impacts and financial performance<sup>25</sup>. Since then the focus has changed, and the emphasis is on improving the performance of upland organic systems through work on animal health, grassland management and the integration of organic farming with agri-environment schemes.

### Parasites

Novel approaches to controlling internal parasites in organic sheep production have been the focus of joint research (funded by DEFRA) involving ADAS, IRS and other partners since 1997. Trials at IRS from 1997 to 2000 demonstrated the potential of forage species such as chicory and birdsfoot trefoil to reduce parasite burdens under Welsh conditions. Further work to establish the animal physiology and pasture ecology basis for this has continued in Scotland and Wales, in particular at IRS Frongoch, ADAS Pwllpeiran and IGER, as well as at two commercial farms in Wales.

### Socio-economic issues: policy, marketing and business

Socio-economic research on organic farming at the Institute of Rural Studies<sup>26</sup>, UWA, has focused on four main areas: development of EU policy towards organic farming (two EU-funded projects from 1997-2000 and 2003-2005); organic marketing initiatives and rural development project (OMIaRD, EU-funded, 2000-2003); organic farm income

<sup>24</sup>IGER (2003) *Organic dairy production. Technical leaflet 1: The output from a system based on feed self-sufficiency. Technical leaflet 2: Results from a system based on purchased concentrates*. In press.

<sup>25</sup>See: Frost, D. (2002) *Organic Farming at ADAS Pwllpeiran 1993-2001*. See [www.organic.aber.ac.uk/library/pwll19932001.pdf](http://www.organic.aber.ac.uk/library/pwll19932001.pdf)

<sup>26</sup>See [www.irs.aber.ac.uk/research/agroecology.shtml](http://www.irs.aber.ac.uk/research/agroecology.shtml) for details of projects and publications.



monitoring (DEFRA-funded), benchmarking (Farming Connect) and statistics (EU/DEFRA funded); and economic, technical and social aspects of conversion to organic production.

## Farming Connect development projects

In 2002/03, the Farming Connect Organic Development Programme supported a series of technical and business development projects, including: benchmarking production costs from organic dairy, beef and sheep enterprises; development of organic forage seed production in Wales; reviewing farmer experiments and experiences with organic horticultural seeds; crop pest and disease control workshops; survey of dipping methods and procedures for ectoparasite and foot root control; review of livestock breeds and organic farming systems; and a review of issues relating to meeting the 2005 requirement for 100% organic feeds. Reports of these projects will be available from OCW during 2003.

## UK Organic Research 2002 Conference

The UK Organic Research 2002 - Research in Context conference<sup>27</sup> was held on 26-28th March 2002 at Aberystwyth. Hosted by OCW, it was the first Conference organised under the auspices of the Colloquium of Organic Researchers (COR) in the UK. The programme was designed to promote a whole system approach to research in organic farming, bringing together economists, ecologists, food scientists, statisticians, farmers and others, to improve the flow of knowledge between researchers and users and to address the needs of a UK and international audience. Sponsored by Waitrose, NAWAD, DEFRA, Triodos Bank and

the WDA, the conference attracted 238 delegates, mainly researchers but also some producers. The next COR Conference will take place in conjunction with the BGS and AAB in April 2004 at Harper Adams University College, Shropshire.

## Research priorities reviews

In 2001, as part of its remit OCW prepared a review<sup>28</sup> of organic farming research priorities for the Welsh Assembly Government, which was approved by the Organic Strategy Group in September 2001. A series of 13 key research areas were identified, with the recommendation that these should be communicated to DEFRA by WAG.

Based on the Welsh review, OCW was asked to prepare a similar paper for UKROFS in the context of DEFRA's 2001 review of organic farming research. A request was sent out to producers, processors, researchers and others to contribute their views, and a paper<sup>29</sup> was produced. Following the review, DEFRA produced its own statement of priorities. In the context of the English Action Plan for organic farming, DEFRA announced that their annual £2 million organic research budget would be supplemented by a further £5 million funding over five years, available through the LINK programme, which requires industry match funding.



<sup>27</sup>Powell, J. et al. (2002) *UK Organic Research 2002. Proceedings of the COR conference, 26-28th March 2002, Aberystwyth*. See [www.organic.aber.ac.uk/Conference/proceedings.shtml](http://www.organic.aber.ac.uk/Conference/proceedings.shtml)

<sup>28</sup>OCW (2001) *Organic farming R&D priorities – a Welsh perspective*. See: [www.organic.aber.ac.uk/research/ukrofs/reviseWelsh.doc](http://www.organic.aber.ac.uk/research/ukrofs/reviseWelsh.doc)

<sup>29</sup>OCW (2001) *2001 Consultation of organic farming research priorities in the UK*. See [www.organic.aber.ac.uk/research/ukrofs/UK%20R&D.doc](http://www.organic.aber.ac.uk/research/ukrofs/UK%20R&D.doc)



## Publications

Organic Centre Wales has produced a range of printed and electronic information for farmers and others. The website at [www.organic.aber.ac.uk](http://www.organic.aber.ac.uk) includes a document library<sup>30</sup> with over 150 research items, links to other websites concerned with organic research, information on conversion and advisory services, an events list, reports on demonstration farm and other events, factsheets, and general information. A recent addition is a page where producers can place advertisements for goods and services.

Associated with the website since 2001 is a free e-bulletin, *Organic Wales*, which is sent out monthly to over 400 subscribers, and contains news and links on organic food and farming in Wales and beyond. A second bulletin, *Organic Market Wales*, focussing on market intelligence issues and compiled by staff at ADAS Wales, appeared in 2002 and is also published monthly.

Printed media are of course always in demand. As well as distributing some 20 technical guides and reports<sup>31</sup> published by partner organizations and others, OCW has produced bilingual versions of existing Soil Association, IGER and ADAS/EFRC technical guides. These are supplemented by a range of factsheets, covering technical matters, grant schemes, input sources and other issues. Technical guides, factsheets and reports produced by OCW are also normally available via the website.

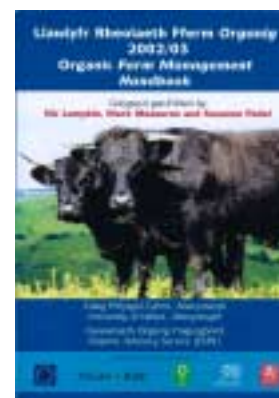
OCW produces a comprehensive information pack for producers considering conversion. This includes a range of

technical guides and fact sheets, as well as a free copy of the *Organic Farm Management Handbook* and *Organic Farming* magazine. When FMD prevented access to demonstration farms, OCW produced in 2001 a *Thinking of Going Organic?* video, available in Welsh and English versions, and distributed free with the information pack.

In 2002, a free organic newsletter, *Tir Organig*, with information on planned events and new activities under Farming Connect, was sent out to 2600 interested producers. This was an attempt to replace the Cambrian Organic Group newsletter, funding for which ended in 2001. However, funding to make *Tir Organig* a regular production has not been secured.

In summer 2003, a free organic newspaper aimed at the public, *Cymru Organig – Organic Food and Farming in Wales*, was distributed via shows, markets, business and farms, providing an opportunity for the organic sector to tell the story about organic farming in Wales.

OCW also regularly produces articles for publication in *Gwlad*, the Welsh Assembly Government's free magazine to farmers in Wales, as well as contributing to various media outlets including television, radio and newspapers. The OCW booklet *Thinking of Going Organic?* has been circulated to all Welsh producers through *Gwlad*, *Y Tir* and *Farming Wales*.



<sup>30</sup>See [www.organic.aber.ac.uk/lib.shtml](http://www.organic.aber.ac.uk/lib.shtml)

<sup>31</sup>See [www.organic.aber.ac.uk/publications.shtml](http://www.organic.aber.ac.uk/publications.shtml)

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## Bilingual technical guides<sup>32</sup>

- Organic Farming*. Welsh Assembly Government/Organic Centre Wales
- Organic Milk Production. 1. Farm production and performance*. IGER
- Organic Milk Production 2. Health of the dairy herd*. IGER
- Roundworm Control in Organic Sheep Systems*. Soil Association
- Managing Manure on Organic Farms*. ADAS and Elm Farm Research Centre

## Leaflets and factsheets<sup>33</sup>

- OCW activities leaflet series (3)
- Objective 5b demonstration farm leaflet series (11)
- Thinking of going organic?* leaflet
- FS1. Organic conversion information/advice and Farming Connect
- FS2. Additional information on the relationship between the Organic Farming Scheme and Tir Gofal
- FS3. Training opportunities in organic agriculture and horticulture
- FS4. Organic approved abattoirs, meat processors and livestock outlets (withdrawn)
- FS5. List of OCW accredited consultants
- FS6. Seeds, feeds, fertilizers
- FS7. Organic farming in Wales
- FS8. Machinery rings
- FS9. Introduction to organic certification for farmers and growers
- FS10. Organic maintenance (stewardship) payments
- FS11. Benchmarking with Organic Centre Wales
- FS12. Marketing organic red meat: direct sales
- FS13. Organic milk production: financial performance

## Consultation responses by Organic Strategy Group/OCW<sup>34</sup>

- Cartegena protocol on transboundary movement of GMOs (WAG, 15-10-02)
- Thresholds for the adventitious presence of approved GMOs in seeds (WAG, 14-10-02)
- Release of GMOs into the environment (WAG, 4-10-02)
- Future of agri-environment schemes in Wales (ARD Committee, NAW, 17-09-02)
- Mid-term review of Agenda 2000 (WAG, 17-09-02 and 15-05-03)
- Future of the Tir Mynydd Scheme (WAG, 14-09-02)
- Proposals for the national envelope under the sheep annual premium scheme (WAG, 16-07-02)
- Policy review of organic farming (ARD Committee, NAW, 01-05-02)
- Sustainable use of soils in Wales (Centre for Ecology and Hydrology, Bangor, 30-03-02)
- Transmissible Spongiform Encephalopathy (Wales) Regulations, 2002 (WAG, 30-03-02)
- Quinquennial review and future of UKROFS (DEFRA, 30-03-02)
- New Nitrate Vulnerable Zones in Wales (WAG, 30-03-02)
- Sale of unpasteurized drinking milk and cream (FSA, 30-03-02)
- A future direction for Welsh agriculture (NAW, 2001)
- Deliberate release of GMOs (NAW, 2001)

<sup>32</sup> See [www.organic.aber.ac.uk/publications.shtml](http://www.organic.aber.ac.uk/publications.shtml)

<sup>33</sup> See [www.organic.aber.ac.uk/library/factsheets/index.shtml](http://www.organic.aber.ac.uk/library/factsheets/index.shtml)

<sup>34</sup> See [www.organic.aber.ac.uk/policy.shtml](http://www.organic.aber.ac.uk/policy.shtml)

# Organic Strategy Group and Sub-Group Membership 2002/03

Organic Strategy Group	Policy sub-group
<p>Gareth Rowlands, farmer, Chair            John Davies, Food Centre Wales            David Frost, ADAS, Chair horticulture sub-group            Andrew Jedwell, consultant, Chair OCW Steering Group, member UKROFS Board            Carwyn James, dairy farmer            Bob Kennard, Graig Farm, Chair marketing sub-group            Nic Lampkin Director Organic Centre Wales, Chair policy sub-group            Hilary Miller, Countryside Council for Wales            Dylan Morgan, NFU Cymru            Rhian Nowell-Phillips, FUW            Louise Owen, Young Farmers Club            Jenny Poole, Organic Farmers &amp; Growers            Lyn Powell, ex ADAS Pwllpeiran            Nicola Salter, Environment Agency            Peter Segger, Organic Farm Foods            Alan Starkey, Welsh Assembly Government            Phil Stocker, Soil Association            Kevin Thomas/Arwyn Davies/Delyth Davies, Welsh Development Agency</p>	<p>Nic Lampkin, Director OCW, Chair            Gundula Azeez/Phil Stocker, Soil Association            Catherine Fookes, Sustain            Sue Fowler, Policy &amp; Development Officer OCW            Andrew Jedwell, consultant, Chair OCW Steering Group            Peter Midmore, University of Wales, Aberystwyth            Hilary Miller, Countryside Council for Wales            Dylan Morgan, NFU Cymru            Kevin Morgan/Selyf Morgan, University of Wales, Cardiff            Rhian Nowell-Phillips, FUW</p>
Marketing sub-group	Horticulture sub-group
<p>Bob Kennard, Graig Farm, Chair            Martin Cottingham, Soil Association            Arwyn Davies/Kevin Thomas, Welsh Development Agency            Nigel Elgar, Graig Farm Producers Group            Andrew Jedwell, Consultant, Chair OCW Steering Group            Sue Jones, Llanboidy Cheese            Neil Pearson, OCW            Suzanne Rees, Organic Farm Foods            David Stacey, Rachel's Dairy</p>	<p>Dave Frost, ADAS, Chair            Gareth Davies, HDRA            Ann Evans, Grower            Liz Findlay, Grower            Rob Haward, Soil Association            Roger Hitchings, Elm Farm Research Centre            Tony Little, Advisory services co-ordinator OCW            Paul Robertshaw/ Mark Simkin, Welsh College of Horticulture            Kevin Thomas, WDA            Alan Starkey, Welsh Assembly Government</p>

See page 21 for OCW steering group (information sub-group)

Photos: UWA, Martin Peck, Arvid Parry Jones

