

FARMING FOR THE FUTURE

AUTUMN 2013 | FIND OUT MORE: <http://producerexchange.marksandspencer.com>

In this issue...

The Power of Partnership
Indicator Farm Programme
The Commitment to Act...

YOUR **M&S**
FARMING
FOR THE
FUTURE

WELCOME

As we head into autumn, we can look back on a summer that was quite different to the previous year. We have enjoyed meeting many of you at the regional agricultural shows we've attended, and we are especially proud of our Farming for the Future award winners, who you can find out more about in this issue.



There has also been plenty going on with our Farming for the Future activity in recent months and I am particularly excited that our education programme has now gone live. The first group of delegates completed our bespoke Agricultural Leadership programme at Cranfield in July. This five day learning programme forms part

of the wider education activity we have introduced, which has been developed collaboratively with our suppliers. Our aim is simple - to help provide a way that those working in the industry can develop their skills and experience, and to encourage new talent into the agriculture and food sector. We look forward to lots of our suppliers and Select Farmers participating in elements of this activity in the future. If you'd like more information then visit Producer Exchange or email using the contact details below.

We are also delighted to find that sustainability is increasingly at the forefront of many of our producers' business plans and there are some fantastic examples in the following pages of the work being done within our supply base. Don't forget to visit <http://producerexchange.marksandspencer.com> to keep up to with the latest news and stories from your sector.

As always we welcome your feedback, please contact us at sustainable.farming@marks-and-spencer.com with your comments.

With best wishes

Sue Bell - Technical Executive - Foods

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BUSINESS UPDATE

The year ending March 2013 saw our food business continue to outperform the market, growing revenues by 3.9%. And, whilst we saw disappointing sales from our general merchandise business (revenue down 2.4%), we continue to grow the business overall with a net increase of 35 stores in the UK and a rise of 16.6% in multi-channel revenue (such as online purchases). Internationally we now operate in 51 territories across Europe, the Middle East and Asia and employ almost 82,000 people worldwide.

In our food business, like-for-like sales were consistently ahead of the market, driven by our trusted quality, provenance and ongoing innovation, which saw us refresh 25% of our entire range. Customers put M&S food at the heart of their celebrations, resulting in our best-ever Easter performance.

The launch of our Simply M&S range, coupled with our well-targeted offers, helped value-conscious customers do more of their regular shop with M&S. Greater employee 'ownership' of zones in our Food Halls enhanced customer service and our improvements to space, range and display delivered better on-shelf availability.

We are currently in the process of implementing large-scale revolutionary

change that spans our supply chain, stores, web platform and IT infrastructure – creating a sound base for sustainable future growth, whilst still remaining true to our founding values of Quality, Value, Service, Innovation and Trust.

Progress on Plan A

Our latest Plan A report, published in June, shows strong progress against our 2015 targets, with 45% of M&S products now having Plan A quality (target 50% by 2015). 139 of the 180 commitments have been achieved with a further 31 'on plan' to be achieved. The original, iconic Plan A commitments – being carbon neutral and sending no waste to landfill – have been maintained and improved as part of a 'business as usual' approach and yet further

reductions in carbon emissions and waste have been accomplished. 1,100 people from disadvantaged parts of the community were helped through business work experience placements in M&S stores, with more than half of these going on to find full-time employment.

What's more, in the last year Plan A delivered £135 million in net benefits to re-invest in the M&S business.

Marc Bolland, CEO of M&S said:

"We can be very proud of what M&S has achieved through Plan A over the past six years but we must continue to adapt and step up to the challenge of the world's climatic and demographic changes. Growing global consumption will continue to put pressure on finite resources, extreme weather is becoming a reality, and social pressures, such as youth unemployment, are becoming more acute.

"We have moved closer to our vision of M&S as a sustainable international multi-channel retailer, but we know that we still have a long way to go to make this a reality. Through Plan A we will continue to push the business case for social and environmental responsibility, develop new alliances and learn from others." ●

THE POWER OF PARTNERSHIP



Executive Director of Foods, Steve Rowe, tells us why he thinks supply chain partnerships and closer working relationships are important...

It is now twelve months since I took over responsibility for the M&S Foods business. And what a great business it is! We offer a fantastic range of products to our customers. We deliver innovative food products of the highest quality. And we are recognised by our customers as a retailer they can trust.

We firmly believe that great food comes from great ingredients and that the best ingredients come from the best farmers and suppliers. We have a team and a supply base of the very highest calibre and I want to thank every one of you for contributing to our success.

Indeed, the M&S Foods business continues to perform well – our results in recent months have been encouraging. But we do not rest –

we have ambitious plans in place to continue to grow and develop our offer.

And what I've realised as I've travelled around the country, visiting some of you on your farms and meeting others at agricultural shows, is that we have a shared ambition – to be more profitable, more efficient and to continue to create innovative products of the highest quality.

What is clear is that mutual success is essential. Our relationships up and down the supply chain must be a partnership – where our success is yours, and you sell through us not to us.

We face many challenges. Economic pressures continue and this means consumer incomes are

down and costs are up, so as a result people have less money in their pocket to spend. That means that they are much more careful about what they buy and how much they pay for individual items, so we are having to keep food retail prices competitive with the rest of the high street.

We recognise that the food sector is also under pressure from rising commodity prices and so we are seeing a squeeze from both ends of the supply chain – customers have less money to spend whilst raw materials are more and more expensive. This situation is not unique to M&S and it is adding huge commercial pressure to the wider food supply chain.

What this means is that we all need to drive for efficiency – something we are working hard on within the M&S business and through our supply chains. Of course, we also face other significant sustainability



challenges – the ‘perfect storm’ of food, energy and water shortages.

Over the next few years we will also have to respond to the growing demand for resources from a rapidly expanding global population. The scale of change and the pressure that it will place on society and the environment will demand a very different approach to retailing in the future. It will also demand a different approach to farming and food production.

Our Farming for the Future programme is our way of working with you to help identify the challenges you face - establishing best practice, supporting innovation and driving change. Our Indicator Farms programme sees us working with more than 200 farms and our Innovation Fund is supporting research and development into the things that matter most to you – things like animal feed, soil and water, pesticides and technical efficiency.

I am also very proud of our Farming for the Future education programme, which has launched this year. This programme, which has been developed collaboratively with our suppliers, sees us supporting and encouraging young people in their careers in agriculture. It is early days but we are working with colleges, supporting apprenticeships, and offering work placements to help young people improve their skills and experience. Back in July I was also really pleased to meet the first group of people taking part in our new Agricultural Leadership Programme, a unique executive education course that we’ve developed with the world-renowned Cranfield University School of Management. This programme is open to anyone in our supply base, from farm staff to processors, and is designed to develop the future leaders of our industry. Feedback from our first course was fantastic and we are

running further programmes in November 2013 and May 2014.

It is clear, though, that the challenges ahead are significant. Supply chains must become more integrated, with close working relationships and mutual objectives. Supply chain security will become even more important than it is today – for all involved.

Here at M&S we have always prided ourselves on our historic, long-term relationships and on delivering our principles - quality, value, innovation, service and trust. This remains as pertinent today as it did when we started...

We absolutely rely on you, our farmers and growers, and I look forward to continuing to evolve our partnerships, and to supporting each other so that we have clearly aligned objectives, and all operate efficiently and profitably, to deliver quality innovative products to our customers. ●

PRODUCE NEWS



This Spring saw the coldest March since the 1960s so it's no surprise that soils were slow to warm through. The cold weather also meant that the flowering of crops was later than normal and pollinator activity was reduced.

UK berries started early and the slower growing really encouraged the sugars to develop. Customers were delighted as they tasted absolutely delicious. In terms of vegetables, the transfer from Europe to UK on outdoor veg was challenging but the growers worked well to deliver volumes and quality, especially on broccoli, cauliflower and lettuces.

We exhibited the M&S Sustainability garden at RHS Chelsea 2013 and, despite it being our first attempt, we were awarded the Silver Medal! This is a fantastic achievement and I'd like to personally thank the growers involved in the displays, as they looked superb.

I must also thank some of our Indicator Farms, who showcased the fantastic work they do in this year's Open Farm Sunday, engaging with consumers to explain how our food is produced.

Neonicotinoids

There has been lots of news and attention placed on neonicotinoids (neonics for short!). We at M&S have

always supported the review of the laboratory science and wrote to MPs last year with this clear message. The reports are very misleading - some would say that neonics are responsible for the reduction of bee populations and yet the beekeepers are saying somewhat the opposite! We have to take a pragmatic view, balancing the needs of our growers with the regulations and also with the needs of our customers.

We are looking at the wider picture of pollinators, which is more in line with the work our growers do, as they are an essential part of our crop production strategy. The EU legislation is quite prescriptive and as such M&S, through our growers, will implement the changes with effect from 1st December 2013 for the two year restriction period. We are reviewing the current pesticide lists in line with these and other changes.

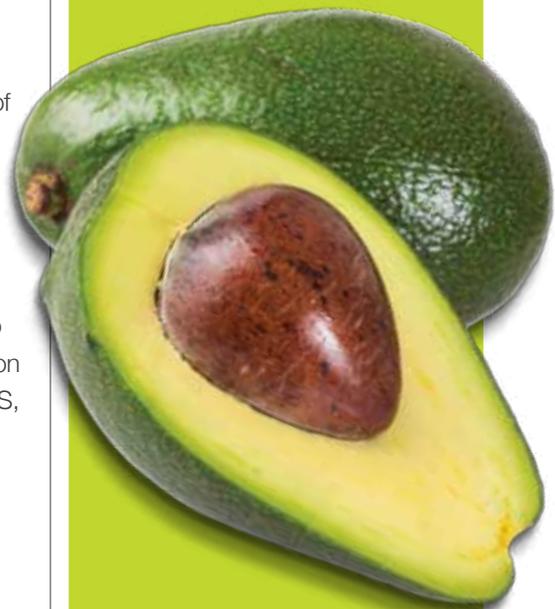
As soon as we are ready to publish our plans for this and the wider pollinator plans, we will update you through our news channels.

All the best

Johnathan Sutton

Head of Agronomy

Renewable investment allows company to become self sufficient in energy



M&S avocado supplier **La Calera** in Peru is also the largest egg producer in its country.

Through an anaerobic digester, the 200 tonnes of chicken manure produced daily provide the 4,000 kWh of power needed to meet the entire heating and electrical requirements of the chicken farm, and also provide all of the power needed to operate the irrigation pumps on their citrus enterprises.

The digested material also supplies 50 per cent of the citrus farm's liquid fertiliser, reducing the need for chemical supplies!

'GREEN IS THE NEW RED!'



To celebrate British Tomato Week 2013, we launched an exclusive new product in our tomato range. The 'sweet green cherry tomato' has a surprisingly sweet flavour and has been grown by M&S tomato grower, Andy Roe, on his farm in Lancashire.

To complement the 'sweet green', the exclusive 'sweet rosso' is also available in M&S stores – another

variety specially selected for its aromatic flavour and developed over a number of years by Andy. It's award winning too... collecting the tastiest tomato award last year at the National Fruit show in Kent.

Currently the varieties are being grown in the UK until November but trials are planned in Spain over the winter, through supplier Melrow Salads.

M&S Tomato Technologist, Jo Oliver says "Not only do the green tomatoes look great, but they taste fantastic and are perfect for snacking. We've been working closely with our growers to create our first ever sweet green tomato and have now found the perfect balance of acidity and sweetness." ●

AWARD-WINNING COMMITMENT TO SUSTAINABILITY

The first ever M&S exhibit at the RHS Chelsea Flower Show proved to be an award-winning example of our commitment to sustainability.

As part of the high profile event marking 100 years of the show, the M&S Horticultural team, together with Kenyan rose supplier, Finlay Flowers, used their display to

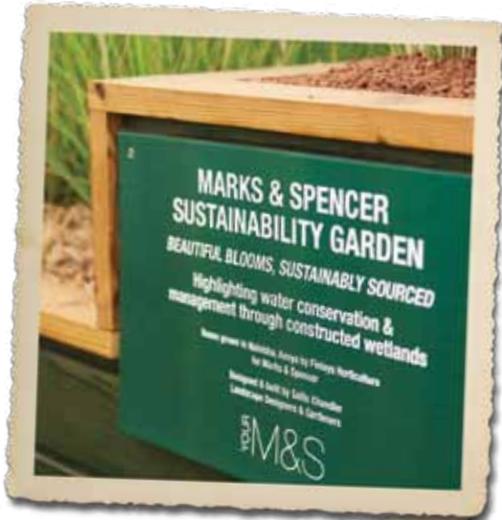


100 YEARS
RHS CHELSEA FLOWER SHOW

educate the thousands of visitors about the benefits of sourcing roses from Kenya rather than from closer to home.

The exhibit replicated all stages of their sustainable production methods with show-goers being greeted by a vibrant display of roses before moving behind the exhibit to see the different stages of sustainable rose production - from hydroponic growing methods to waste water recycling and the innovative constructed wetlands created by Finlay Flowers on the banks of Lake Naivasha.

Sallis Chandler, a small Surrey-based landscape design and gardening company, carefully planned every last detail of the stand with sustainability in mind. The stand was hand built using natural light in an unheated polytunnel, using ethically sourced building materials.





The result? A silver award in the educational category. For designer John Sallis Chandler winning an award was the icing on the cake. ‘Working on an exhibit for RHS Chelsea is something all garden designers aspire to undertake in their career – to win an award for your first effort is even more fantastic’.

M&S flower technologist Charlie Curtis said: “The highlight of the show for me was talking to the hundreds of people who came to our stand. We had lots of great feedback on the quality of the roses we sell and people were really interested in learning about where the roses came from. Most had no idea that the roses we source from Kenya are grown in such a sustainable way so it was fantastic to get the message across to so many of our customers.”

To ensure nothing from the day was wasted, surplus roses during the five-day show were donated to the Royal Chelsea hospital. The entire exhibit has been donated to Groundwork UK, who plan to use it as a permanent display in a London community scheme. ●

Introducing Matt O'Hagan – Senior Agronomist at M&S

Having been involved in agriculture and land based industries all my life, I graduated from Harper Adams before moving to Lincolnshire to work in the brassica industry. During my eight years there, I gradually moved over from Agronomy into a more Technical Manager role, focusing primarily on NPD and packaging.

I then spent a further seven years working on Tropical and Exotic Fruit and Vegetables including a short time in Herbs in Technical Director and Technical Development Director roles. This opened my eyes to a completely different product range with a unique set of challenges.

Challenges facing the veg industry

The main challenge to all agri-industries is the increased pressure on resources. On top of this, it seems likely that changing weather patterns will continue, presenting



huge supply challenges into the future. Whatever the issues, however, producing safe, high quality, wholesome food in a sustainable way must be at the forefront of all that we do.

This means that as an industry we must embrace new technologies and innovation. These advancements have the potential to help us to deliver a reduction in the level of inputs used, as well as improve quality and freshness, whilst also ensuring minimum impact on the environment. I look forward to working with our growers and suppliers to try and overcome these challenges through the M&S Farming for the Future programme. ●





UK PLANTING FOR NEW VARIETIES

Whilst we are working to grow our new UK tomato varieties over in Spain in the winter, we're also trying to grow many of our imported apple varieties here in the UK.

The popular **Papple™** was once again a hit with consumers this year. The pear, grown in New Zealand, and which looks like an apple but tastes like a pear, delighted consumers in the short three week window that it was available from late May-early June this year.

Top-fruit agronomist Andy Mitchell is pleased that availability looks set to increase from next year. "Worldwide Fruit have now negotiated a license for production in the UK and are in the process of planting 15,000 trees over the next three years. We hope to have the first British grown fruit in store by Summer 2014 which is great news for all those Papple™ lovers!"

Another exclusive apple variety to M&S this year is the '**Rockit™**' – a bite sized apple, sold in tubes, providing consumers with a naturally sweet, healthy snack.

The largest fruit is no bigger than one and a half golf balls and its size and sweetness is as popular with adults as it is with children.

The season starts at the end of June and is grown in Hawkes Bay, New Zealand.

However, supplier Worldwide Fruit has now also planted 1,650 trees of the variety in the UK and hopes to extend supply into the autumn. Managing Director, Phil Alison says, "We've had lots of positive

customer feedback on the Rockit variety, our plan is to expand our planting to generate enough home grown fruit to supply throughout the British season."

The most recent variety to capture customer's attention is the **Tiddly Pomme®** 'the smallest apple on the high street'. Measuring just 42 mm in diameter, the Tiddly Pomme® was discovered by accident by Empire World Trade Fruit Consultant David Cranwell, who stumbled across an unusual tree during a routine orchard walk. Struggling to choose the right name for this new apple, the M&S team asked customers to come up with a name through a Facebook competition. After being bombarded with over 6,500 name suggestions, 'Tiddly Pomme' was the clear winner. The first commercial crop is being grown in New Zealand, with hopes to have British grown versions available for customers in the future. ●

TOMATO GROWER ACHIEVES ZERO GREEN WASTE TO LANDFILL

Over recent years M&S tomato supplier, Wight Salads Group, has been investing in new technology to reduce its impact on the environment, and to minimise energy costs.

Wight Salads grow a variety of tomatoes for M&S including baby cherry, baby plum, vine and organic tomatoes. The company's base on the Isle of Wight provides an ideal climate for the fruit, benefiting from the warmest weather in the UK, with brighter days and more hours of sunshine.



Reducing waste sent to landfill has been a key objective for the company and the opening of an on-site facility to turn green waste into high quality compost, has helped them to achieve this aim.

How does it work?

The Waste Management Site is run by two full-time members of

staff and is known simply as "the big shed." Inside the building, batches of green waste, including stems, fruit, vine leaves and even biodegradable string, are chopped and mixed with 10% horse manure and 10% waste wood to encourage the composting process. Rows of waste are then built, with each one containing 200 cubic metres of material, and then covered with a Gore-Tex membrane.

The first phase of the composting process takes around four weeks, and during this time oxygen levels and temperature are closely monitored to prevent combustion, and to ensure the material is kept at the right temperature to meet BSI PAS100 requirements for composted material. During phase two of the process the rows of material are uncovered and mixed, to get a consistent temperature, and then kept at 60°C for a further three weeks to kill any bugs and seeds, and to sterilize the compost.

Next the compost goes into the maturation phase where it remains for another six weeks. At this point the material goes through a 10mm screener and any over-screenings are re-composted until they are

small enough to pass through the screener. The waste has now been transformed into high-quality organic compost and is ready to be used in the glasshouses.

What's in?

Everything from the growing process is compostable except plastic bags, but these are sent away and recycled so they don't end up in landfill. Office staff also play a key role in reducing waste with all clean cardboard and office waste being separated and sent for composting. Anything else that can be recycled is separated before it leaves the site.

Benefits

Previously Wight Salads was buying in new compost and sending used compost away to be managed, but now the complete process is done on-site and they can produce around 1,000 tonnes of compost each year. The project has meant that not only do Wight Salads avoid buying in compost, saving around £60,000 a year, but the quality of the composting material is also far superior. Furthermore, all the ingredients are fully traceable and can be tailor-made to suit the soil requirements. ●





VIEW FROM THE FIELD - MARION REGAN

M&S grower, Marion Regan is in it for the long run - if her family's history is anything to go by.

The business was established 120 years ago, when her family had a stand at the Old Covent Garden Market. With demand outstripping

supply, Marion's great-grandfather began growing his own fruit at Baron's Place Farm in Mereworth, Kent. Over a century later, the family business now farms 700 hectares of mixed soft fruit and arable, employing 35 permanent staff and up to 450 seasonal staff in peak season. The business has been supplying M&S for nearly 40 years and is this year growing

the 'Driscoll's Diamond' variety of strawberries exclusively for our customers. Here we take a look at some of the sustainable practices on the farm and how these have ensured the business' continued success:

Staff

Marion says: "retaining the family feel is important - we never lose



sight of the fact that our pickers are the most important people on the farm, without them we wouldn't have a business. As the farm has expanded the small team ethos has remained, with staff arranged into groups of around 35, overseen by individual supervisors who are accountable for their team's earnings and conditions.

Environment

With half of the farm's berries being grown in soil rather than substrate, Marion recently took on extra land to allow her to extend her crop rotations to five years—helping to manage crop hygiene and soil-borne diseases whilst also reducing reliance on pesticides. Their commitment to environmental conservation goes well beyond audit requirements and recycling is a way of life for staff. Wider than necessary field margins have helped to increase populations of indicator species with hare and endangered bird populations now breeding across the farm.

Efficiency

Looking forward, Marion is keen to focus on making the most of current resources, concentrating on varietal selection and operational

efficiency to grow more tonnes per hectare, rather than continuing to blindly expand. A third reservoir is currently under construction and will capture an additional 36,000 cubic metres of run-off from tunnels. High-tech irrigation systems monitor weather and light, feeding plants only when they are actively growing. Farm trials are also working to identify varieties that are more water efficient and produce higher levels of in-spec fruit - whilst not compromising on flavour.

Consumer habits

Looking at the wider picture, given the past few summers, Marion believes growers need consumers to adjust their perception of soft fruit to guarantee consistent UK sales. "As an industry, we really need to weatherproof soft fruit, especially strawberries. Sales are very much driven by sunshine so the industry needs to find ways of persuading consumers to use berries differently, for example, on their breakfast cereal."

With Marion and her husband, John, positively living and breathing their business, this looks like a family farm that is here to stay. ●

QUICKFIRE TRAINING AND WEBINARS

Quickfire training is available either remotely via the internet, face-to-face at your site or at the Muddy Boots headquarters in Herefordshire, UK. Existing users can also benefit from free online webinars.

Josh Snook (pictured) has been the Key Accounts Co-ordinator on the Marks & Spencer account since September 2012;



"Since joining the team I have been busy co-ordinating some of the communications flow surrounding the Field to Fork Scheme here at Muddy Boots HQ. I'm really enjoying being a part of the on-going collaborative effort to raise the scheme to new heights, with some exciting new developments on the horizon."

Remember, if you have any questions regarding Quickfire audit management software, you can contact Josh or your dedicated Account Manager, Jack Evans on the details below.

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PRODUCE NEWS

SUSTAINABILITY IN ACTION – TIMBERLEA FARMS

M&S stonefruit producers, Timberlea Farms, have ducks patrolling the orchards and staff driving round in golf buggies. Although seemingly bizarre, on closer inspection these are actually two elements of a much wider sustainability programme that has been carefully implemented by the South African business. The programme echoes many of the M&S Farming for the Future objectives - from input reduction and environmental conservation to technological innovation and staff welfare.



Energy

A 3 million Rand solar pv project now subsidises 30 per cent of Timberlea's total electrical consumption. Usage is carefully controlled and monitored and methods such as timers in the cold rooms are allowing the farm to achieve a 1kWh reduction per kilogram packed year on year. Vehicles have been installed with a satellite tracking system contributing to a six per cent reduction in fuel usage and 13 per cent reduction in kilometres driven year on year. The use of electric golf carts also provides an environmentally friendly alternative to farm vehicles.



Water

All rain water on the farm is channelled into catchment dams. 70 per cent of crops have soil moisture probes to inform irrigation strategy and all water used in the packhouse is metered. Future plans include replacing high water usage crops with more sustainable varieties as well as further increases in the use of soil probes.

Education

Children of all employees have their school fees paid by Timberlea. In addition to this there is a media centre and facilitator on each farm site, which aims to supplement the facilities and education provided at school. Timberlea is also registered as a Chess school and competes in inter-school competitions.

Andrew Mellonie, Senior Agronomist at Marks and Spencer is pleased to source stonefruit from Timberlea through supplier Mack Multiples. "The team at Timberlea have incorporated sustainability into all aspects of their business and are continually measuring and monitoring their performance to see where further improvements can be made. It's great to see them using innovative ideas as well as proven methods to ensure their business remains fit for the future".

And what about those ducks? The domestic birds are used to control slugs, a significant pest in South African fruit production. This technique reduces reliance on slug pellets, which can be damaging to birds and other wildlife populations. A novel approach to pest control! ●

AUTOMOTIVE INDUSTRY INSPIRES CHANGE FOR CITRUS SUPPLIER

In 2007, Spanish citrus supplier, Martinavarro, took the decision to raise the bar in the produce sector. The company, which has been supplying M&S with oranges and easy peelers for more than 50 years, began applying 'lean' manufacturing principles to its business. The aim was to set up a new quality standard within the complex fresh produce industry with a higher level of reliability – using processes that have been successfully implemented in automotive factories.

Martinavarro worked according to the Total Quality Management principles (TQM), which largely focus on people. The philosophy is based on the belief that knowledge and training leads to personal development and increased self-esteem, which in turn creates a more effective workforce.

Embracing TQM meant adapting the very culture of the business to make it work. So, at an organisational level, line workers and plant managers are now separated by a



maximum of three hierarchical levels. This ensures that a line worker is no longer a passive participant of the process but a key player. His or her knowledge comes into play and becomes relevant and integrated, feeding back into the system.

Daily indicators are also displayed in a very visual way allowing staff to rise to the challenge of eliminating all technical losses. They work through a 'tense flow' problem-resolution system - a very demanding way of working that takes into account every improvement idea.

In addition to this, everything is measured: "If you don't measure, it does not exist", says Pablo Carpintero, Director of Production, Martinavarro. "Teams have now started talking about accomplishments and objectives in a numerical way."

Also, to improve the staff working environment, the company has installed floor-to-ceiling photographic imagery of citrus groves (pictured) bringing the pack house to life.

It's unsurprising, then, that Martinavarro are focused on continuous improvement.

Since the implementation of TQM six years ago the quality ratios have been improving



consistently despite the climatic crisis last year. TQM has become so important that Pablo believes that if their business had still been based on traditional methodology, the weather of 2012 would have put their ability to supply at risk.



Johnathan Sutton, Head of Agronomy at Marks & Spencer is impressed with their achievements: "It's great to see Martinavarro taking the lead in the industry, using proven management systems from other industries to improve their efficiency and develop their staff. These are both key themes of Plan A and set an example which I hope many other businesses in the produce industry will adopt." ●



LIVESTOCK & FISH SECTOR OVERVIEW

STEVE MCLEAN | HEAD OF AGRICULTURE & FISHERIES



The last few months have continued to be challenging for livestock farmers. For dairy, beef and sheep farmers the late spring added pressure for those already short of forage stocks, and the exceptionally dry weather seen through June and July caused problems with grazing and silage-making, with grass growth non-existent in some areas. At least the warm weather has continued into the autumn, extending the grazing season.

The hot weather also caused issues for the intensive livestock sectors, including difficulties with heat stress, resulting in slower growth performance and the potential for increased mortality. Once again, the weather dominates our thinking.

What this reinforces is that we can no longer rely on a 'typical' season and must all make contingency arrangements to cope with whatever weather patterns come our way. At least the hot weather saw strong sales of meat for BBQs!

The other ongoing challenge relates to input prices. Whilst feed prices have eased a bit since last winter,

protein prices have remained higher than they were last year, and fuel prices continue to rise. Feed prices are now falling following a promising harvest, but margins remain under pressure.

It remains more important than ever, therefore, to focus on farm efficiency and environmental factors to ensure that your business remains fit for the future, and our ongoing activity through our Farming for the Future programme is here to help you meet the challenges ahead.

Following the horse-gate saga earlier this year we are also seeing far more interest in supply chain integrity and

provenance. This only reinforces our position of having our own Codes of Practice and working with you, our Select Farmers, to deliver high quality products to our customers.

I would like to thank you all again for your hard work and dedication and for the part that you play in ensuring that our values of Quality, Value, Service, Innovation and Trust are delivered to our customers every day.

Finally, it would seem that we are getting some clarity on the future direction of the Common Agricultural Policy. EU member states have now come to an agreement on how reform will be implemented, although, as always, the devil will be in the detail. There are now twelve months for member states to implement the reforms and DEFRA has committed to working with the NFU and the wider industry to agree how direct payments will be implemented and what the greening measures will involve. Time will tell... ●

LIVESTOCK & FISH NEWS



One of the key welfare challenges in pig production is how to manage the sow around farrowing time, with piglet mortality being a welfare and economic issue.

The most common cause of piglet mortality is crushing by the sow, and around 50 years ago farrowing crates were developed to try to minimise this by restricting sow movement.

Whilst the use of crates does reduce the number of crush incidences, it is also considered a welfare issue for the sows, as they are unable to move about freely. Crates do, however, bring some benefits for the stockman, as they make it easy to assist in farrowing and inspect livestock. Other rearing systems, such as outdoor-bred, are considered more welfare friendly and all M&S fresh pork is currently outdoor-bred.

Despite this, we recognise that there are definite sustainability benefits from indoor production and are therefore keen to support on farm research into non-confinement farrowing systems to see if they offer a viable alternative to the traditional farrowing crate, whilst

delivering improvements in sow and piglet welfare. As a result, we have supported the installation of a new non-confinement farrowing system via part funding through our Farming for the Future Innovation Fund.

Pork producer, James Bodman, of South Park Farm near Andover, has erected the new facility, with 20 sow spaces initially, although there are plans to increase this to 40 over time.

“We have 550 sows in a closed herd and now have around 15 per cent farrowing in this system,” explains James. “The unit is based on the designs developed as part of the PigSafe project between SAC and Newcastle University, although we’ve adapted them slightly to suit our own liquid feeding system.”

The PigSafe design features a straw-bedded nest area with sloping walls and an ‘escape area’ for the piglets to reduce the risk of crushing when the sow lies down to suckle. A heated creep area is also provided adjacent to the nest area to encourage the piglets to lie in safety, particularly immediately after birth. A feeding area for the sow

is provided at one end of the pen, with a slatted floor area for ease of management, and this is behind a gate, so that the sow can be shut back to allow safe inspection of the litter.

With four groups of sows now having been through the system, it seems to be working well, although it remains too early to have any measurable results.

“It is early days but the sows seem to like the new approach,” said James. “They have the choice to lie where they want and can display natural nesting behaviour when they are getting ready to give birth. So far, laid-on mortality is low, at around seven per cent, so that is encouraging too.”

One concern that some farmers have around non-confinement farrowing systems is the ease of management post-farrowing but James reckons that this isn’t really a problem. “This concept seems to work well,” he explained. “Once the sow has farrowed she is easy to manage. The grids between the pens allow the sows to ‘chat’ to each other and they can move about as they want to. We also find that we can access the sow or the piglets easily for routine handling/management due to the system of gates that is in each pen.”

Now that the system is up and running, James will be working closely with M&S supplier, Tulip, and the Farm Animal Initiative (FAI), who will be collecting data on the performance of the system for M&S. We will then look to share the findings with our wider supply base so that other farmers can benefit from James’ learnings. ●

LIVESTOCK & FISH NEWS

M&S SUPPORT PROJECT IN THE CELTIC SEA

The Celtic Sea is one of the most heavily used seas on the planet, with many people depending on it for food, energy and their livelihoods. Over the last three years, M&S has helped to fund Project PISCES (Partnerships Involving Stakeholders in the Celtic Sea Ecosystem) led by WWF-UK. This project worked with a diverse range of stakeholders including those from the fishing, recreation, oil and gas industries to assess their total impact to the marine environment. This joined up approach allowed stakeholders to share their experience of good practices and find ways to manage activities more sustainably.

The PISCES project activities ended on 31 December 2012 with the key marine stakeholders involved reporting a measurable increase in understanding of the ecosystem approach and sustainable management. A total of 77 stakeholders, including government representatives, worked collaboratively to develop good governance guidelines which were then communicated through three final events in London, Madrid and Brussels. PISCES was then disseminated to a total of 11,187 wider stakeholders through a comprehensive programme of outreach.

Celtic Seas Partnership

Under the Forever Fish programme, M&S are now helping to fund the next four-year project phase of PISCES which has been named the 'Celtic Seas Partnership'. This started in January 2013 and builds on the strong sense



of identity, trust and understanding developed between members through PISCES. The aim of the project is to bring together key marine stakeholders, governments and the scientific community within the Celtic Seas so that they can find workable ways of implementing the Marine Strategy Framework Directive and to then feed that information directly into marine management at a European level. This is an opportunity for marine stakeholders to help shape and influence how their marine environment will be managed in the years to come.

This complex but exciting project will also develop tools to reduce conflicts between different marine activities, such as fisheries and renewable energy. The lessons learned and best practice can then be applied to other regional seas in EU maritime waters.

Wild and Farmed Fish Sourcing Technologist Hannah Macintyre says: "Being involved in projects such as these through our Forever Fish campaign enables us to make a real difference within the wider marine environment. When customers walk into our stores I want them to be absolutely assured that the fish they buy is responsibly sourced, sustainably fished and that they can have complete confidence and trust in M&S." ●

Forever Fish Campaign MCS Beach Clean



In April we once again joined up with the Marine Conservation Society to clean up UK beaches. This year's event was even bigger than last year with:

- 300km of beach and waterways cleaned
- 4,000 bags filled with litter
- 30,000kg of litter removed
- Almost 9,000 people registering to take part, including over 4,000 M&S employees.

Some interesting finds included a scooter, a pirate kite, a diver's hat, a monopoly house, an X-Men figurine and a large metal sword!

DOING THE RIGHT THING



We are delighted that our producers in Indonesia are going beyond the call of duty to protect endangered species in their country.

The Lampung Farming Community work in a 2500ha area amongst the Mangrove forest in South Sumatra, raising prawns through extensive methods in traditional ponds.

No artificial feeds, antibiotics, chemicals or pond aeration are used during culturing, with shrimp feeding on natural algae in the ponds. The prawn farming community have adopted the 'Silvofishery polyculture technique', whereby mangroves are planted in the ponds which help

stabilise banks and provide protection from the cooling winds. Their root nodules also help to absorb the prawn's nitrogen waste and maintain the pond ecosystem. To date, 60km of mangroves have been planted by the community along the coastline of South Sumatra, with a target of 1 million trees to be planted by 2020.

However, the community does not just look after their immediate environment. The farmers also support the Sumatran Rhino Sanctuary, where they use part of the money that they earn to feed four endangered rhinoceros.

The Sumatran rhino is the most critically endangered species of rhinoceros with fewer than 280 believed to survive in the world – it is no surprise then that in 2012 Sir David Attenborough named this endangered species as one of the top ten he would like to save from extinction.

M&S has committed to help the farmers in this region as part of its Plan A ethical initiative, giving them forward orders of large volume and forecasting further orders up to 12 months ahead.



This security has meant they can develop a processing factory and an ice plant that meets M&S standards whilst continuing to plant Mangrove trees and support the rhino sanctuary and breeding programme.

And here at M&S we are also ensuring our customers can do their bit to save the Sumatran Rhino. A donation is made to this important rhino sanctuary from every pack of Indonesian Black Tiger Prawns sold in M&S stores. ●

A photograph showing two fishermen on a boat. The fisherman in the foreground is wearing a grey hoodie, a blue beanie, and blue gloves, and is holding a large shellfish. The fisherman in the background is wearing a green jacket, yellow overalls, and blue gloves, and is also handling the net. The net is filled with shellfish, and the background shows the interior of the boat with various equipment.

LIVESTOCK & FISH NEWS

M&S SUPPORT
GROUND-BREAKING
SHELL FISH RESEARCH
PROJECT IN ORKNEY

Marks and Spencer is helping to fund a pioneering research project in Scotland. This project is the first UK-based Fishery Improvement Project (FIP) seeing the collaboration of M&S, Orkney Sustainable Fisheries Ltd (OSF) and WWF to support the inshore fisheries of Orkney in developing and implementing an ongoing programme to enhance their sustainability.

Significant national and international markets already exist for Orkney seafood products, with the county contributing a quarter of all brown crab and a third of all velvet crab landings by Scottish vessels. As a retailer committed to sourcing seafood from sustainably managed fisheries, funding from M&S (together with the Orkney Island's Council and the local fishing industry) will enable the local creel fishery to develop rigorous stock assessment and monitoring practices through the project to ensure inshore fishing remains a long-standing and valuable component of the Orkney economy.

Funded by the Crown Estate and Marine Scotland, local boats will be fitted with GPS to provide improved mapping of the seabed to inform the siting of the wave and tidal renewable energy installations. As well as mapping the area, thousands of tagged brown crabs and juvenile lobsters will be released each year to allow monitoring of spawning migrations, which will also inform siting decisions. The ultimate aim is to develop a truly sustainable future for both marine energy and fisheries, whereby they can share knowledge and work alongside one another.

The four year project has been initiated by not-for-profit organisation Orkney Sustainable Fisheries Ltd. Sarah Murray, a recent Masters graduate from Heriot Watt University Orkney campus, has joined full time shellfish researcher Kate Walker for the summer season to carry out stock assessment work as well as going out on observer trips with local fishermen and assisting with the running of the lobster hatchery.

Stewart Crichton, OSF Chairman, said: "We're delighted to be involved in this innovative and ground breaking research project.



The successful delivery of the programme will further enhance Orkney's reputation as a forward thinking fishery community, which I am certain will add value to our fishery products."

Hannah Macintyre, Aquaculture and Fisheries Sourcing Technologist from M&S said:

"We're passionate about sustainable fishing at M&S and have been working with our supplier of Orkney crab for many years so it is fantastic to have the opportunity to work alongside Orkney Fishermen's Society and WWF on such an exciting project. Our customers love the hand-picked white crab meat, really valuing the Orkney provenance, and this project means they can continue enjoying Orkney crab long into the future."

Lang Banks, Director of WWF Scotland said: *"This is a really exciting project that could deliver for the people of Orkney a double win of a profitable, sustainable fishery as well as clean, green marine power industry."* ●

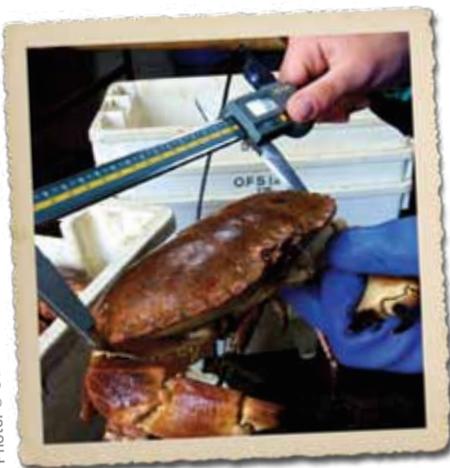


Photo: © Colin Keidie

Another strand to the project addresses the needs of the emerging marine energy sector.

SUMMARY OF BEEF INDICATOR FARMS PROGRAMME - YEAR 1



The indicator farms programme was set up as a way to help farmers identify changes that they can make to their business that drive sustainability. The beef and sheep project has now been running for more than a year, with a group of 30 farms from all over the UK and Ireland, and has thrown up some important topics to investigate...

Working with SAC Consulting, participant farmers have provided information about their farms through one-to-one meetings, which has then been used to draw up a RoadMAP (mentored action plan) highlighting areas where there is potential to implement change on their farm. Upon analysis, SAC found that the aggregated potential financial benefit of implementing key actions across all the farms ran into tens of thousands of pounds.

Key measures included livestock nutrition, livestock management, soil nutrient management and care. One action area that was commonly raised was making better use of clover. Here, it was found that if half of all the grassland managed

between the farms could establish a strong clover sward, the indicator farms could save the equivalent of some 540 tonnes of manufactured nitrogen (over £160,000 at current fertiliser prices). Other action areas included more precise rationing, improving grassland management and weighing cattle more regularly.

The participants also had access to Sustainable Beef Club events throughout the year, which are a collaboration with McDonald's. These events, run by E-CO2, provide the opportunity to get practical advice from external experts, as well as allowing farmers to visit other farms and share knowledge with their peers.

In addition, farmers had access to telephone support, regular technical literature mailings and £250 of analytical services (such as silage analysis and ration formulation).

Angus Jeffrey, one of the participants in the programme, reckons it has already been really beneficial for his farm. "Since being in the indicator farm group we have improved our business in several directions. One direct action that we have taken has been to introduce clover into our grass swards in an effort to reduce our fertiliser inputs".

Going forward, next year's programme will focus solely on beef as this is where the greatest potential financial and environmental benefits have been identified. Planned focus areas include nutrition, soil health, fertility and performance recording. We plan to share our learning with the wider supply chain, so that all of our producers can benefit from this work. ●

AGRICULTURAL LEADERSHIP PROGRAMME

As part of our Farming for the Future focus on education, we have developed a unique executive programme – the M&S Agricultural Leadership Programme - in collaboration with our suppliers and with Cranfield University School of Management.

This five day customised course is aimed at post graduate/management level young people working in the M&S supply base. The programme is run once or twice a year and aims to advance an individual's understanding of sustainability and supply chain management, as well as develop their personal leadership skills. Through participation in the programme, individuals will broaden their knowledge of how the food supply chain works, what the challenges are, and how they can play a leadership role as their career develops.

When we first scoped out this programme we decided to work with Cranfield University, as its School of Management is internationally recognised as a world leader in management education and research. The first programme ran in July, with 16 delegates from across our supply base taking part. Feedback from the programme was excellent, with participants' comments including "I've learnt a huge amount about myself and I'm eager to put it into action. I'm confident that my business will benefit as much as me" and "This is an innovative programme that dealt with relevant everyday working issues. It has changed me for the better..."

The programme content includes:

Monday	Tuesday	Wednesday	Thursday	Friday
Welcome and Introduction to Programme	Supply Chain Concepts	Sustainable Supply Chain Management	Leading Change in the Organisation / Managing the Change in Me	Introduction to Leadership in Action
Personal introductions	Supplier Relationship Management	Leading Change in the Organisation / Managing the Change in Me	Developing My Leadership	Leadership in Action Scenarios
Group Supply Chain Exercise		Developing My Leadership	The Leadership Report	Leadership in Action Scenarios (Continued)
Corporate Responsibility & Sustainability			Preparing Bespoke Scenarios	Action Planning
Team Challenge				Course debrief & summary

How does the programme work?

The overall approach of the programme is one of learning rather than teaching, with the structure based on the realities of participants' working lives, to ensure that the programme is highly relevant, meaningful and stimulating. Throughout the programme, participants are encouraged to consider:

- What does this mean to me?
- What does this mean to my role as a leader?
- What does this mean to my area of responsibility?
- What does this mean to my organisation as a whole?

Get involved...

If you want to develop your knowledge of the industry and your personal leadership skills then this

course is for you. Participants may work in any discipline at farm level, processor level or within M&S and the course is open to applicants from across the globe.

If you are interesting in applying then please contact Annitta Engel at annitta.v.engel@marks-and-spencer.com

The next course runs from November 4 - November 8, 2013 and is fully subscribed but there will be further programmes in May (May 12 - 16) and September 2014.

The course costs £3,500 per participant and covers tuition, accommodation and food. This is a subsidised cost as M&S is partially funding each place by paying almost 25% of course fees. ●

FARMING FOR THE FUTURE AWARDS



Region:
Ireland

Name: Graham McIlroy

Farm: McIlroy's Chickens
Product: Oakham chicken, beef and lamb

Graham boasts the first carbon neutral poultry farm in Northern Ireland and has invested in a range of sustainable projects and renewable energy sources to reduce his carbon footprint.

Graham and his father Ronnie's high attention to detail in hygiene and animal welfare was evident throughout the farm, which houses 54,000 chickens, 350 Suffolk x Cheviot ewes and 100 suckler beef cows.

Judges applauded his business decisions, based not only on economics but on what is 'the right thing to do'.



Region:
Wales

Name: Justin Scale

Farm: Capestone Organic Poultry Ltd
Product: Organic free-range chicken and turkey

Justin is the fifth generation of the Scale family to be involved in poultry production and now supplies 65,000 Christmas turkeys into M&S through the family-run company.

The 400-acre farm's location in the temperate climate of the Gulf Stream provides an ideal environment for free range poultry and judges were impressed by Justin's high health and welfare standards.

Capestone also place great emphasis on community engagement and education, hosting visits for local primary school to educate pupils on the important link between food and farming.



Region:
Scotland (Produce)

Name: Steven Jack

Farm: NessGro Ltd
Product: Carrots and potatoes

Entries were so strong in this region that the judges named two winners, one from produce and one from livestock.

Steven grows regional new potatoes and speciality carrots for M&S along 200 hectares of the Moray Firth coast. As both a grower and a packer, he has full control over the quality and freshness of his produce from seed to store.

Innovation is at the heart of Steven's business and his new variety trials with M&S have helped to create a niche in the produce market.

Judges were particularly impressed with Steven's strong focus on NPD and supplier engagement.



Region:
Scotland (Livestock)

Name: Angus & Niall Jeffrey

Farm: Bielgrange
Product: Beef

Angus Jeffrey and son, Niall are dedicated to running a sustainable business both financially and environmentally. Continued investment means their breeding herd of Aberdeen Angus now stands at 330 head, with new ideas always tried and tested before investment decisions are made.

Judges were impressed by Angus and Niall's commitment to countryside stewardship as well as their excellent health and welfare standards. A reed bed now purifies dirty water and run off from the farm whilst grass margins and managed hedgerows have improved wildlife habitat and bee activity.



Region:
England

Name: Rob Stacey

Farm: Rowe Farming Ltd
Product: Daffodils

Rob Stacey supplies 100% of the outdoor daffodils on sale in M&S stores. The farm's innovative integration of complementary enterprises (daffodils and new potatoes) means that Rob and his fellow directors Mark and Edward Rowe are able to share labour requirements and equipment effectively over the 3,500 acre operation.

Judges highlighted Rob's dedication to staff development and welfare; Rowe Farming Ltd is the only daffodil grower of this scale to employ all 800 pickers directly, providing staff with a fairer deal and more job stability.

Region:
International

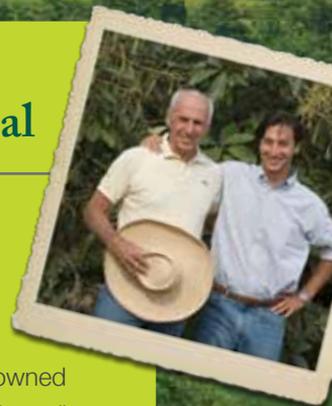
Name: La Calera

Location: Peru
Product: Avocado

La Calera is a family owned enterprise growing high quality avocados for M&S. The company also produces eggs, citrus and grapes, accounting for 40% of the total fruit exported from Peru.

Judges were impressed by how the farm goes the extra mile for its staff and the environment using efficient irrigation methods and renewable energy sources to reduce their environmental impact.

All 1,500 staff at La Calera are provided with meals, training and health insurance and a charity set up by the family has built and funded schools, nurseries, community centres and more.



**Champion of
Champions**

The winners of each category are put forward for the prestigious Champion of Champions award, which is voted for by M&S customers through the M&S Plan A website. Steven Jack was crowned Champion of Champions at a reception at M&S HQ on October 3, 2013. Congratulations Steven!

Watch the regional finalists in action

To view the videos of the finalists in each of our regional categories, visit our producer website:

<http://producerexchange.marksandspencer.com>

END HUNGER >>> GROW FARMING FARM AFRICA



M&S Head of Agriculture and Fisheries, Steve McLean, has recently flexed his muscles to help end hunger in rural Africa. He took part in the 'Tanzania Highland Challenge', run by Farm Africa in support of Food for Good, and joined other food industry leaders (all pictured above!) from the UK for the 145-kilometre trek through the Tanzanian Highlands.

Farm Africa is a charity working alongside smallholder farmers in Africa giving them the tools and skills they need to feed their families. It also trains farmers in how to market and sell what they produce so they can build sustainable businesses and incomes for their families for years to come.

Food for Good sees the UK's food and hospitality industries coming together to support Farm Africa's work. It was born in 2011 when 10 senior executives from the industry climbed Mount Kilimanjaro in support of the charity. Food for Good had continued and this year's activities

have seen a group of senior women executives from the food industry go to Kenya to dig a fish pond, as well as a team of chefs climb Mount Kilimanjaro. The year's fundraising activity was capped off with the Tanzania Highland Challenge.

This saw Steve and his fellow team members trekking along wild and uncharted paths completely off the tourist trail. The route started outside Arusha where the team visited Farm Africa's forestry project in the Nou Forest, which will benefit from money raised by the trekkers. They then made their way from Lake Eyasi up into the Highlands and around the

Ngorongoro crater rim before descending down the eastern side along game and Masai tracks, finishing at Lake Natron.

Commenting on his involvement, Steve said: "This was a unique experience which made me realise how privileged we were to participate in a challenge that will make a real difference to Farm Africa project participants. It was extremely tough - certainly the toughest thing I've ever done - but Farm Africa does make such huge differences to the lives of some of the poorest of poor and more importantly, the lives of their dependents."

At the time of writing the Food for Good project has raised more than £427,000 for Farm Africa projects - money that will make a real and lasting difference to people in East Africa ●

THE COMMITMENT TO ACT...

It is now six years since Plan A was first launched and back in June we held a headline event for suppliers at Wembley Stadium to underline how essential our sustainability strategy remains.

More than one thousand suppliers attended the Plan A conference, where chief executive, Marc Bolland, gave a keynote speech pledging to drive our commitment to sustainable products even further. He explained that Plan A delivered net benefits of £135 million to the business last year and described how our approach was helping our business, and our suppliers' businesses, to improve efficiency and reduce waste. He also showcased the importance of integrity in our food supply chain and thanked suppliers for their part in making that happen.

The highlight of the conference, however, was the keynote speech from climate change campaigner and former US Vice-President, Al Gore, which brought a standing ovation.

He shared a desire for change and action amongst people, and explained that "the best and brightest people now want to work for a company which gives them a chance to do something meaningful... to be part of something larger than themselves." His call to action was for decision-makers to "find value beyond the £ sign" – and to consider a broad spectrum of factors rather than purely financials and short termism.

Al shared his views on valuing

environmental and social value – "just because you can't see it, doesn't mean it isn't real," he explained. He also outlined what he believes are the six drivers of global change:

- Ever-increasing economic globalisation – the global economy is being transformed by changes far greater in speed and scale than ever before – something Gore described as "Earth, Inc."
- Worldwide digital communications – the internet and social media have led to what Gore described as "the Global Mind," which links the thoughts and feelings of billions of people and connects intelligent machines – driving a 'tsunami of change'.
- Power in the balance – Gore explained that the balance of global political, economic, and military power is shifting more profoundly than at any time in the last five hundred years – from West to East and from politics to markets.
- Gore outlined how the rapid growth in human civilisation – in the number of people and the power of technology - is leading to unsustainable growth in consumption, pollution and depletion

of the planet's strategic resources of topsoil, freshwater, and living species.

- Gore spoke of how changes in science and biotechnology are transforming the fields of medicine, agriculture, and molecular science—and are putting control of the building blocks of life into human hands.
- Finally, he spoke of how we have been slow to recognise the danger we are creating, and how collective thinking is still dominated by short termism. But he spoke of how we have the capacity to start solving the climate crisis, as long as people have the courage to act - "Young people need inspiration," he said. "If they look around in the future and we haven't changed anything, and they see storms and floods and drought, they're going to ask us – 'what were you thinking?' but if we can make a change, they might ask us – 'how did you find the courage to do that, and make such a difference to the future?'"

Al concluded with a very clear personal challenge to everyone in the room – 'we need only the commitment to act'. ●

A number of awards were presented at the Plan A conference to food suppliers that have embraced Plan A principles in their businesses.

Winners were:

- Supplier of the Year: Tilmanstone Salads
- Environment: G's Fresh
- People: Barfoots/SCL
- Innovation: Finlays Horticulture
- Lean manufacturing: Tilmanstone Salads
- Partnership: Dawn Meats
- Farming: Worldwide Fruit

Congratulations to all! We will shortly be profiling these winners on Producer Exchange.

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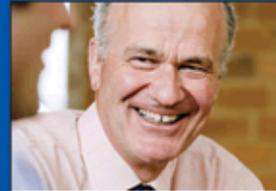
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Renewables



Andy Fussell,
Entrepreneurship



Steve McLean,
Supplying supermarkets



Neil Johnson,
New entrants



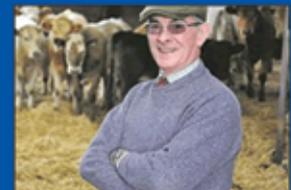
Wyn Owen,
Leaderships



Edward Garner,
Retail



Phil Geraghty,
Crowd funding



John Henderson,
Share farming



Mark Robins,
Dairy farmer



Gaynor Wellwood,
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