

Chewing the cud with Kevin Brewer



Broken foot

Some years ago England's third most important football trophy rejoiced under the name of the Milk Cup, more recently replaced, as is so much sponsorship in sport, by cola and beer companies.

Milk has enjoyed fleeting connections with football in the UK, including arguably the most memorable advertisement in British television history which warned young would-be footballers that failure to drink their milk would leave them only fit to play for Accrington Stanley, a team famously demoted from the English league in a previous era.

Beer and cola companies dominate the current media circus that surrounds the World Cup and amongst all the commercial promotions of every type and style imaginable, I have yet to see anything supporting milk or, indeed, marketing any form of dairy product.

The exception being perhaps the USA, where I hear David Beckham is the latest signing in the long running milk moustache campaign.

Yet the health, fitness and athleticism on show throughout the finals in Germany will be based on diets containing more dairy than lager and pop.

For the second tournament in succession UK headlines have been dominated by Broken Foot. Although it may sound like the location of an infamous battle, this is not a British equivalent of Wounded Knee, but rather an affliction seemingly debilitating our greatest footballers just at the moment they should be shining on the World stage.

Previously it was Beckham, Neville and Gerrard, this time around it is Owen and Rooney who are struggling.

The blame, it has been suggested, lies with former British Prime Minister Margaret Thatcher. Early in her political career, while Minister for Education, she earned the nickname 'Thatcher Milk Snatcher' when she brought to an end the free milk that used to be provided on a daily basis to all school-age children throughout the country.

The argument runs that the negative impact this has had on bone growth and strength due to a lack of calcium in children's diets is only now revealing itself in the all too easily broken feet of young footballers.

This may or may not be true, but I expect strong milk producing and consuming nations to feature in the final stages of this year's tournament, Germany, France, Italy and hopefully England from Europe, Brazil and Argentina from South America.

A significant dairy industry may not guarantee international footballing success, just look at the parlous state of the game in New Zealand, but it does seem to be an essential factor when you consider that Australia and Iran did make the finals and the Asian qualifiers too are the established dairying countries of Japan and South Korea.

Perhaps New Zealand's problem is they export too much of the milk they produce and need to consume a little more.

At the beginning of September Beijing will stage China's fourth World Dairy Expo and just a couple of days earlier, New Delhi will play host to India's first international dairy show, ILDEX.

Government policies in both nations are geared towards developing significant modern dairy industries and increasing dairy in the diet.

Over the last few years China and India have consistently topped the league with the fastest growth in milk production and consumption.

In football, the impossible can happen. This autumn, amazingly, Accrington Stanley will end a 40 year exile and return to the Football League and if you listen carefully, you may be able to hear the strengthening of bones in the legs and feet of a new generation of Chinese Beckhams and Indian Rooneys.

The transformation is likely to take rather longer than the four years to the next World Cup, but given the increasing rate at which the milk is flowing, it is surely only a matter of time before China and India join the footballing cream. ■

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Trading places

Although only around 8% of total global milk production finds its way on to the world market, once you take liquid milk out of the equation, getting on for a quarter of all processed dairy products are traded internationally.

Mainly in the form of the three key bulk commodities, butter, cheese and powder and primarily from three regions, New Zealand, Europe and Australia, who between them account for over 85% of world trade.

Add the USA and Argentina, with roughly a 4% share each, and you complete the world dairy exporters club that has contained pretty much the same five members for some time.

Differences in structure, support and growth between the dairy industries of these regions could not be greater, however, and it is not simply a contrast between a subsidised north and free trading south.

The EU-25 might produce a quarter of the world's milk, but quota capping has kept production pretty much unchanged in almost 20 years.

Unfortunately, the same can be said for EU consumption, resulting in a constant annual surplus that has to be dumped outside its protected boundaries.

The USA may similarly support its producers and also have an almost constant annual surplus to export, but in contrast to the quota frozen EU, has a dynamic and growing dairy industry that has delivered a steady increase in both production and consumption over the same two decades.

Solely in milk production terms Oceania is a minor player, its 4% share of world supply six times smaller than that of the EU. But with a population 20 times smaller and a milk output that has doubled over the same 20 years EU production has been static, New Zealand and Australia between them now account for some 50% of the international dairy trade.

This rapid increase in milk tonnage moving from Oceania to Asia is perhaps the only significant change in the market as, the occasional political or climatic calamity aside, the fundamentals of world

dairy trading in terms of the places of origin and destination have been reasonably constant since the early 1980s.

Mexico, China, Japan and north Africa consistently feature as the major dairy importers over this period. But, if the future is the liberalised market of tariff free access and zero export subsidies under discussion at the WTO, who then will be trading places?

New Zealand and Australia should remain as the major drivers in the market as with low home consumption and producers already operating at world prices, the only thing likely to prevent further export growth is climate change.

Drought and flood have already disrupted production to a limited degree, but is this a temporary blip or the shape of things to come?

Weather aside, the Oceania producer has further opportunities for growth and may also benefit from higher market prices if subsidised dumping is suspended.

South America is perhaps the next Oceania, here too producers are already geared to world prices and have potential to respond enthusiastically to any relaxation of market access. Not only would Argentina increase in prominence, neighbouring Brazil could also develop into a major player, together displacing USA exports to Mexico.

North America may slip out of the export club altogether and this will put downward pressure on producer prices until either production falls or consumption rises to balance the current annual surplus that could no longer be dumped.

But it is in Europe where a WTO deal would hit hardest, leaving three choices in handling its 35% share of world dairy trade. Remove subsidies to continue exporting, cut production by around 12mt or increase consumption by the same amount.

By scheduling a series of quota increases from April, the EU has signalled an intent to grow rather than retract, but the potential impact of these policies on farmer prices suggests production would fall, and many producers too. ■

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Hair today

Traffic jams are one of my pet hates so I do as much of my driving as possible after midnight when the roads are clear and I can put my foot down.

Another advantage of the early hours is the BBC's World Service on the radio and I recently caught a programme in which David Cameron, the latest leader of the UK government's official opposition, selected his favourite recordings.

It seems we have similar tastes as one of his choices, Ernie by Benny Hill, was the first record I ever bought.

Ernie, a cross between Superman and the Lone Ranger, drove a milk cart pulled by his trusty horse Trigger and could deliver milk to people's doorsteps faster than anyone else in the west. His girlfriend Sue, who lived at 22 Lilly Lane, had a desire to bathe in milk and when advised "you want it pasteurised," she said: "Ernie I'll be happy if it comes up to my chest."

Ancient Egyptian beauty Cleopatra was also famed for bathing in milk and I have seen two very different explanations of her actions suggested by various historians.

First, that milk was possibly considered to have a preserving effect on the skin, making you look younger, and second, that it was simply a symbol of wealth and position to the minions of her domain who would struggle to buy enough milk to make a bowl of custard. I do have my own theory however, and it comes from bucket feeding calves.

All our heifer calves are hand-reared on whole milk until they are two months old, with the milk fed twice a day in little blue plastic buckets.

Some calves are tidy drinkers and gulp their milk straight down while others get all excited, head-butting the bucket, blowing bubbles and splashing milk everywhere.

I have noticed that those that constantly splash their faces, or dip their noses deep into the bucket, get bald patches wherever milk is regularly in contact with their skin.

My contribution to the historical study of the bathing habits of Egyptian Queens is that long before the days of Gillette and Immac, milk was the original depilatory treatment.

This enabled Cleopatra to preserve her legs and underarms as smooth, shiny, hair free zones, and thus capture the attentions of Roman nobles and establish her infamy.

A more modern spin on the role of milk in feminine beauty is presented by the UK's Milk Development Council in its current marketing campaign aimed at teenage girls.

The Naturally Beautiful campaign follows MDC commissioned research indicating that only one in four girls is eating the recommended three portions of dairy products a day.

The serious stuff is all about osteoporosis, the bone thinning disease prevalent in older women that increases their risk of fractures.

Teenage years are especially important for bone growth and there is a real concern that young girls are failing to consume sufficient dairy products to meet their recommended calcium requirement of 800mg a day and are therefore increasing the likelihood of succumbing to osteoporosis in later life.

The campaign, which has its own website (www.naturally-beautiful.co.uk) aims to bolster the amount of calcium teenage girls consume by focusing on the many beautifying nutrients that can be found in milk, cheese and yogurt.

As well as calcium for bones and teeth there is also a look at other beautifying nutrients in dairy products including copper, zinc, iron, vitamins A and B2 and essential amino acids that are important for good skin and healthy, shiny hair.

Best thing on the website though is the movie of three glamorous models getting in to the beautifying benefits of milk, cheese and yogurt, although being ultra-modern, rather than bathing in milk they have to settle for a shower. ■

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Scale model

Recent figures presented by our milk co-operative show the average farmer making a profit before the EU single payment of £5,188 (\$9,700) for the year to March 2006. Although clearly insufficient to cover cash needs, such as loan repayments, reinvestment and living expenses, it is still a better position than I anticipated given our own fiscal performance and the situation described to me by almost every UK dairy farmer I have spoken to in the last few months.

Here in Wales, milk production is a traditional family affair and although average herd size has increased steadily it is still lower than other regions of the UK at about 80 cows. Looking again at the co-op figures I see their 'average' farmer is milking more than twice that number and the discrepancy between their presented profitability and the reality for a majority of their members immediately becomes apparent.

Text accompanying the figures emphasises the importance of attaining 'critical business mass' and applauds those who have enough cows and litres to still cover overheads and produce a return despite the co-op's failure to achieve a reasonable price for their milk. Whether or not the presentation of such misleading figures is an attempt to obscure its failure, in defining critical business mass at 1.75M litres the message from the co-op is clear, grow or die. Co-operation it seems, in the UK at least, is no longer a haven for the small farmer.

The question of scale is, of course, not new as in almost all major milk producing countries average herd size has steadily increased and producer numbers declined over many years. But there does appear to be a significant change underway in the structure of milk production on a global basis with acceleration in the rate of both parameters either predicted or already apparent.

Milk production in the UK is currently at its lowest level for more than a decade with producer numbers declining faster

than herd size is increasing. A similar picture is anticipated across the rest of the continent as new EU milk policy changes are rolled out. Although critical business mass will be significantly lower due to the better milk prices enjoyed in many EU states, the toll in producer numbers will be high. Some have suggested countries like France could lose up to half of its dairy farms within five years and it is difficult to see milk production being maintained at current levels given an exodus of that scale. But for every negative there is a positive and I have come across plenty of committed dairymen who are determined to survive current hard times in expectation of a golden future of high prices due to limited supply. I admire their optimism.

My recent visit to India, the world's biggest milk producer, presented many contrasts to Europe's changing picture. An annual output of 90M tonnes of milk from close to 300M cattle, one third of them buffalo, and an average herd size in single figures.

While EU milk quotas have kept a lid on production since the mid-80s and current policies seem destined to deliver less milk from fewer farmers, India has travelled in the opposite direction.

National production has risen more than 25% in 10 years and producer numbers have increased. The Indian producer enjoys a milk price close to the European average, but with yields averaging 1,000 litres and little or no quality control, critical business mass is perhaps a thousand times less than that suggested for the UK.

Both India and China are aiming for substantial growth in milk output over the next decade and face similar dilemmas in the scale model to deliver their targets, herds of hundreds or a multitude of small family units. They would do well to keep their eyes on Europe for the next five years and see what impact the race to fewer larger herds delivers in terms of total milk output, average milk price, cow comfort and rural life. The experiment has begun. ■

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Humpty Dumpty

As a child, a favourite joke was: 'Which is the only ice cream company in the bible? Wall's of Jericho!' Following a recent meeting in Beijing with a panel of technical experts from China's ministry of agriculture, I had opportunity to climb Ching Chang Cheng, the Great Wall, touch the 'hero stones' set-up at the top by Chairman Mao and wave to the space shuttle.

The portions of wall open for climbing are substantially restored and regularly maintained as the majority of the 4,100km long structure, built from 221BC, is showing its age and has regular breaches where stones have been recycled into local housing. The walls around Jericho, the world's oldest town, would have been 9,000 years older, if they had not crumbled at the blast of the trumpets on the seventh march of Joshua's army.

Here in Britain we have the 117km Hadrian's Wall, built in AD122 to defend the northern frontier of the Roman Empire, but overrun twice by northern tribes before its abandonment around sixteen hundred years ago. Its failure evidenced by the Scottish specialists working at the Ecosyl headquarters in the north of England. The most spectacular demolition in our time however, must be the dismantling of the Berlin Wall, which came down with a wallop at the end of the 1980s just 28 years after it was erected.

As a species we do not yet seem to have tired of this long tradition of reinforcing our differences, with the construction of a dividing wall between Israel and Palestine nearing completion and the USA seriously contemplating walling itself off from the rest of the Americas. But scanning through history it is interesting to note that, despite significant developments in both building techniques and materials, the effective lifetime of these barriers is getting shorter.

During 2006 we hosted visitors from the Middle East, South America and New Zealand and happened to visit mainland Europe, Ireland, North America,

Africa, India and China. Throughout my travels I have always been struck, not so much by the differences, but by the similarities.

We all have so much in common and when it comes to milking cows, face pretty much the same problems and challenges. In the summer an audience member at a presentation I made in New Delhi, stood up and made a little speech about the urgent need for an increase in the retail milk price in order to lift returns to Indian dairy farmers. I have heard almost the identical argument at meetings of our co-operative in the pub down the road.

This summer the EU will make a small reduction in its market support price for butter, the final step of a five year programme to remove trade distorting subsidies from dairy production.

Implementation of this policy has been far from painless with milk prices falling across the region and many farms becoming unprofitable. To date the negative impact has been strongest in the UK, amongst the first to fully implement the reforms at farm level, where producers have been quitting the industry at such a rate that national milk production has fallen to its lowest level since Europe's last major dairy reform in 1984. It remains to be seen whether France and Germany suffer similarly over the next two to three years.

But the dairy trade walls around Europe are not coming down just yet. It has simply removed the encouragement to dump surpluses over the wall, bringing to an end the splattering of international traders with left over butter and SMP.

You don't have to listen too carefully however, to hear the blowing of trumpets from the armies of the WTO marching around the perimeter.

Some see a crumbling of the wall and imposition of free-trade as inevitable, but my travels have taught me that it is not only the farmers of Europe that would suffer as a result. If there is to be a great fall, I hope politicians realise how difficult it would be to put back together again. ■

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Foodless thought

It looked more like a chicken shack than a harvester, a shivering timber box on iron wheels, stranded on the headland, spewing out clouds of black dust and sounding like the end of the world. At age 11, I had a summer job on the village farm estate collecting the sheaves as they belched from this ancient threshing machine and stacking them in stooks under the hedge.

It was a thresher binder, one of the last in commercial operation, shedding grain from the loose stalks forked in by hand at the front and neatly tying off the sheaves of long straw, with sharp steel wires, as they dropped out of the back. It took six of us to keep her fed, racing around black as chimney sweeps, ducking under a web of drive belts and pulleys, all communication by hand signals due to the noise.

A stark contrast to the shiny, red Massey Ferguson combine-harvester, driven in lawn-mower lines, by my grandfather on the neighbouring farm, but it was not the grain we were after. The tightly wired long sheaves of straw were the main fruits of our harvest, destined to thatch the roofs of some grand Wiltshire houses.

The chalk-downs of Wiltshire are still a sea of wheat, rolling like waves in the wind, but it was not always so. The previous generation would have seen a sea of green not grain, grassland plains grazed by a multitude of sheep that brought full employment and industrial wealth to the woollen mills of Trowbridge and world-wide fame to the carpet makers of Wilton and Axminster. Even here, in my part of Wales, it is little more than a generation since wool was the mainstay of the economy. You can still find a few water driven woollen mills dotted around the Teifi valley, now operating as tourist attractions and the National Wool Museum is but an otter's dash downstream from our farm.

Trowbridge's Clarks Mill no longer produces the finest woollen cloth, but is home to my accountants and the local Magistrates Court. An irony capped by

the only surviving breed of sheep to bear the county's name, the Wiltshire Horn, a good source of meat but most famous for being bald, producing no wool at all. Sheep, of course, remain very much at the centre of the agricultural economy in Wales, but it is now entirely meat focused.

The superior quality and flavour of Welsh Lamb has gained European recognition and a significant export market across the continent and beyond. The value of the wool now barely covers the costs of shearing.

One of the biggest sheep markets in Wales, perhaps in Europe, is held at Welshpool, a typical market town not too far from the English border. A favourite watering hole is the town's Royal Oak Hotel, also the location of a recent National Farmers' Union conference where, according to reports, the meeting descended into uproar when one of the invited speakers declared there was no longer a need for British farmers to produce food. "The British public does not want what farmers are currently producing, food can always be imported from abroad."

Coming from the green lobby, the speaker's foodless thoughts were more along the lines of environmental services than the roofing materials, floor coverings and fabrics that used to be major products of British agriculture. I am also sure he was not thinking of the rapidly emerging biodiesel industry. Almost every magazine and newspaper I have opened recently has been plastered with biofuel headlines along three distinct themes – growing biofuel will make you rich, growing biofuel will destroy the planet, growing biofuel will starve the world.

It has also been suggested that as more land is turned to power farming, cattle feed will become scarce and expensive. But only yesterday I was offered a magical new wheatfeed belching from the back of a biodiesel threshing plant that will have to be shipped to landfill unless there are enough food producers available to feed it to their cows. ■