A Blueprint for Starting a Successful Beef Producer Group

A report for

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By John Joyce

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Scholar Contact Details

John Joyce

Roegarraun, Carrigahorig, Lorrha, Nenagh, Co. Tipperary, Republic of Ireland

Phone: +353-87-656 7947

Email: johnroughran@gmail.com

NUFFIELD IRELAND Contact Details

John Tyrrell,
Executive Secretary,
Nuffield Ireland.
Phone: 00-353-87-2563501
Email: exec@nuffield.ie

Executive Summary

The beef sector in Ireland is an important part of the agriculture sector (27% of gross agricultural output, over 100,000 farmers and 10,000 jobs) and over 90 % of its output is exported. The structure at producer level is heterogeneous, fragmented and producing low or negative incomes for farmers who rely heavily on CAP payments to survive.

The Irish meat processing industry is privately owned, and is concentrated, with three companies having 60% share of cattle slaughtering. Relationships between producers and the processors are strained. This contrasts with the dairy industry which is expanding, profitable for producers, progressive and co-ops control the majority of processing, thereby giving the dairy producers direct access to market information.

Producer Groups (PGs) or Producer Organisations (POs) have been set up in many agriculture sectors and across many countries, to enable groups of producers to combine their efforts to improve their returns from the market. Some of these focus on supplying from a particular geographical area, specific breed or variety, or use a specific production method. The groups organise their production in order to meet the market capacity and avoid a glut.

There is EU legislation, since 2013, allowing groups of producers to organise themselves as POs, in a way that does not breach Competition Law. This legislation is supported by national legislation setting out the details of how this operates at member state level. There is also grant aid to encourage and support the formation of POs.

There are 3,434 recognised POs in the EU, of which 210 were in the beef and veal sector.

The study looked at a number of case studies of producer groups in the beef and sheep sectors in Ireland and four other countries, and found successful groups of farmers who combined their efforts to develop niches in the market and combine with other parts of the value chain for mutual benefit.

These groups organised themselves in a legal structure, usually as a co-op or similar structure, and had a clear governance structure which guided their operation.

The author believes that there is a good future from the formation of producer groups by farmers who are willing to work together, with a shared view of what they can commit to a processor as a group (e.g. specific breed, region, production method, and supply pattern or quality specification).

There is a need for a supporting body to provide advice and guidance to existing and prospective groups, so that they understand how to form and operate a successful group. The start-up grant for a PO should be increased from €3,000 to €10,000 to encourage their formation, and ensure that they have the expertise and technology to ensure their viability.

The co-operative livestock marts have facilities and professional management, and are a resource which could support PGs and POs in their efforts to add value and improve producers' viability.

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Abbreviations

MII – Meat Industry Ireland

GAO – Gross Agricultural Output

DAFM – Department of Agriculture Food and Marine

IFA – Irish Farmers Association

ICOS – Irish Co-Operative Organisation Society

AGM – Annual General Meeting

ICM – Irish Country Meets

KK – Kepak

JBS – Jose Batista Sobrinho - Brazilian meat processing company

ICBF – Irish Cattle and Beef Federation - & Sheep Ireland

AIB – Allied Irish Bank

PG – Producer Group

PO – Producer Organisation

UCD – University College Dublin

EAFRD – European Agricultural Fund for Rural Development

CMO –Common Market Organisation Regulations

BTAP – Beef Technology Adoption Programme

SI – Statutory Instrument

USDA - United States Department of Agriculture

MARC - Meat Animal Research Cent

USP - Unique selling point

ABP - Goodman Food Group

Personal Introduction

Nuffield BMC 10/60 – On the home farm since new in 1965 – still in perfect working order.

I am a fifth generation farmer from Carrigahorig, Lorrha in North Tipperary. Farming in this area is diverse with cattle, sheep, tillage, dairy, and even sheep milking farms.

The family farm is a dry-stock sheep and cattle enterprise, with some tillage and agricultural contracting. After secondary school I decided to pursue a career in farming, and graduated from Rockwell Agricultural College where I was awarded the Green Certificate.

My practical experience for the Certificate brought me to Toowoomba, Queensland, Australia where I operated combine harvesters for the second biggest harvesting contractor in Australia "Harvest Force Pty Ltd". I then travelled to work on farms in New Zealand.

On my return, I took over the running of the family farm where I built up my own flock of sheep and cattle. I cross bred Cheviot-Suffolk ewes with Texel Rams, which suits our farm ecology and husbandry. The suckler cows were crossbreeds of Charolais – Limousin – Hereford, as well as Angus and Simmental cows. The bull were mainly Limousin, with the use of AI on some cows, with Charolais, or Belgium Blue bulls for ease of calving. Male calves are kept as bulls and are finished at 20 months, and heifers are finished at 24 months. Our target is to produce our livestock is a sustainable way taking into account the environment, animal welfare, lifestyle and economics. I also grow some tillage crops.

I acquired some good quality and affordable second-hand machinery and began to provide an agri-contracting service to local farmers.

I became actively involved in farm organisations Macra Na Feirme (young farmers organisation) and the Irish Farmers Association (IFA) and have seen the benefits of being involved in such organisations. I served as Agriculture Affairs Chairperson for Macra Na Feirme in 2013 and was a member of their National Executive. In addition I served a four year term as Chairperson of the Terryglass branch of the IFA and am currently a member of the Carrigahorig Development Village Committee.

Rationale for the Study

The beef industry in Ireland consists of a small number of processing companies (all of which are privately owned), over 100,000 beef farmers and about 60 livestock marts (with the majority of activity in co-operatively owned marts). Over 90% of beef production is exported. It is an important part of the agricultural economy accounting for over 28% of agricultural output.

The dairy industry in Ireland is also an important part of the agricultural economy, however, co-operatives are the major processors of milk, thereby giving their shareholder farmers a direct route to market and the share of margin from processing and marketing.

Farmers are price takers for finished beef cattle, and they are unable to influence the way that the finished product is marketed, and cannot anticipate if they will make a profit margin by the time their cattle are ready for slaughter. Some processors contract for the purchase of limited quantities of certain breeds e.g. Angus beef, which obtain a premium. The timing of supply of finished cattle is not co-ordinated by the producers.

Supply of finished cattle to the meat factories is influenced by the time of year (most calves are born in the Spring), weather factors affecting the supply of grass and fodder, and factory agents contacting farmers directly when they need cattle for slaughter. This can lead to a glut of finished cattle at times, which reduces the price. Farmers cannot forecast in advance the sale price or profit margin for their finished animals. There is a lead time of almost three years in the production of finished animals (age at slaughter 20 to 30 months, plus gestation of 9 months).

Livestock marts provide a way for farmers to sell livestock in an open market. However, this is best suited to young and immature stock, whereas finished cattle sold in marts are unlikely to get the best price.

Is there another way that farmers can work together to produce what the market wants and provide farmers with a more secure return? Can another way be found to encourage innovation, good practices and meet consumer expectations about the way, and by whom, their food is produced?

Can producer groups provide a solution for farmers to work together to provide the answer? What can we learn from others who have tried this? What is needed to set up and sustain a producer group? Is there a Blueprint for setting up a successful Producer Group for Beef?

The countries visited on my research scholarship were USA (Colorado and Washington DC), Canada, New Zealand, China, the Philippines, France, Belgium, England, Wales and Scotland.

Objectives

- To identify how Beef Producer Groups in Ireland can organise producers in order to achieve sustainability of production & income, meet market needs and encourage knowledge transfer.

- To learn from Producer Groups in other sectors in Ireland and abroad and identify why they are successful and expanding.

- To examine supports which may be available for Producer Groups at country or EU level, and assess how the existing mart structure and facilities might be used to support and provide services to Producer Groups.

- To put together a blueprint structure for a Producer Group, setting out how it can be governed and operated.

- To explore how Producer Groups can engage with meat processors to organise supply of product throughout the year, quality standards and special product from specific breeds, locations or production systems.

The Beef Industry

The beef industry in Ireland is perceived as low margin farming. However, exports of beef in 2019 were valued at €2.3 billion (DAFM 2020). An estimated 10,000 jobs are involved in the processing and distribution side of the business - (MII, 2016). Of the 124,000 farmers in Ireland, 70,000 sell beef animals of some type on a regular basis to meat factories, mostly in small numbers.

The size of Ireland's Beef industry is significant. In 2018 Gross Agricultural Output across all of agriculture was € 7.96 billion (DAFM 2020). The beef sector was the 2nd largest contributor (after dairy) and accounted for 27% of GAO. There were 6.56 million cattle in Ireland according to the December 2019 livestock survey.

Irish beef production is predominately a grass based system, with around 620,000 tonnes produced in 2019. Of this, exports were 561,000 tonnes of beef worth approximately € 2.3 billon. Also the live export of cattle is a large part of the industry with 247,000 animals exported, worth approximately € 93 million.

There are 54,000 farmers where the dominant enterprise is the rearing and fattening of cattle for beef. (Teagasc NFS 2018). This includes a wide range of farm sizes and systems. It includes calf rearing to beef from the dairy herd (1.43 million cows), as well as the suckler herd of 957,000 cows. The average stock numbers on these cattle rearing (35 Livestock Units (LU)) and fattening farms (50 LU). (Teagasc NFS 2018).

This ex farm output value of € 2.3 billion has a multiplier effect in the overall economy and this is a key part of the sector's importance to the regional development which is where the contribution of the sector is at its most visible.

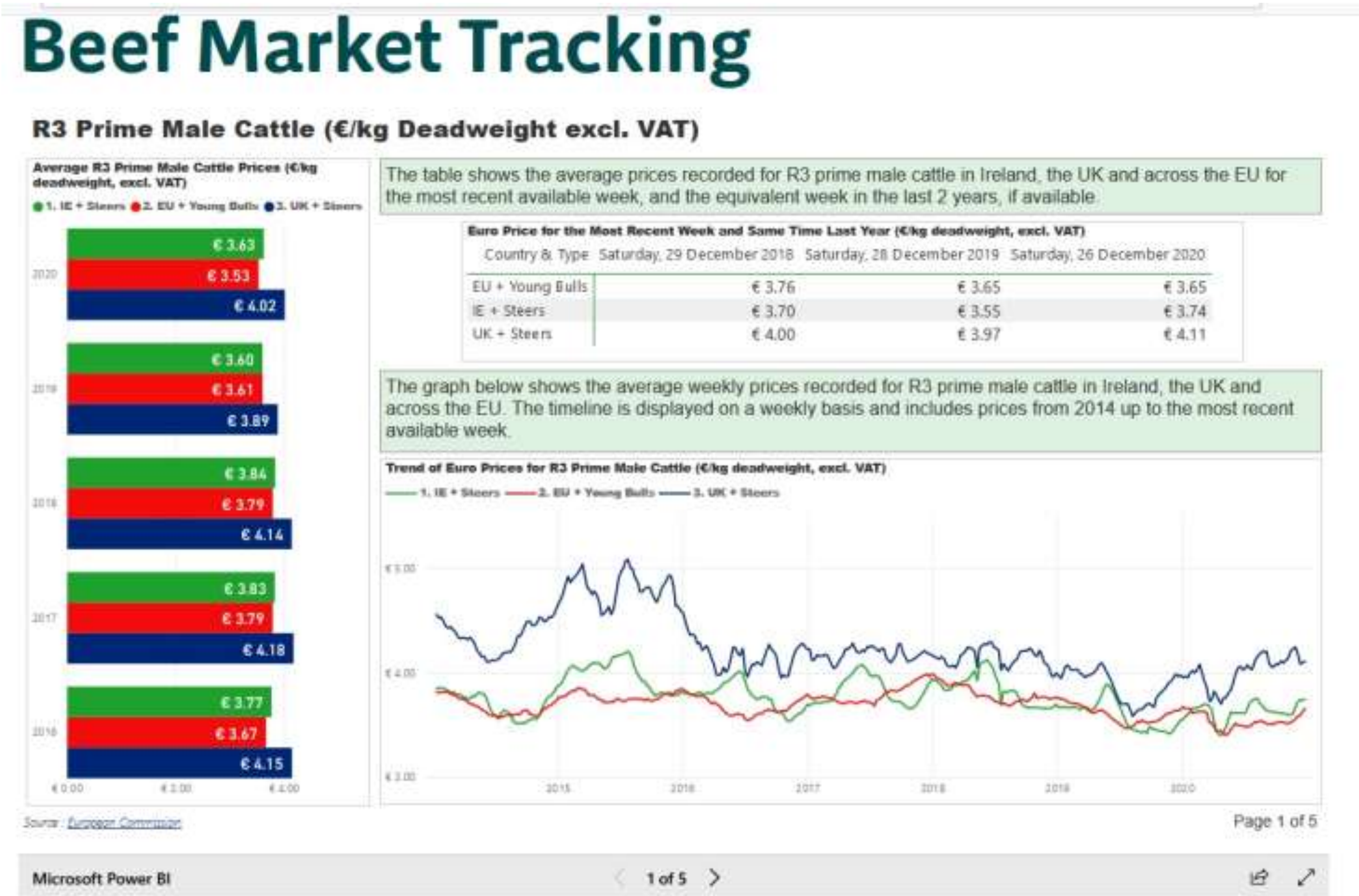
The dairy industry in Ireland has been able to benefit from major advances in dairy research (grass production, breeding, systems, animal welfare, environment and product development) and industry structures which have made enabled the sector to be profitable and grow significantly. With organisations such as Teagasc, the Irish Cattle Breeding Federation, Animal Health Ireland and the producer controlled processing and marketing structure have combined to make the dairy sector a growing, progressive industry with great prospects,

The ending of milk quotas in April 2015 led to an increase in cattle numbers from the expanding dairy herd, a trend is likely to continue, but at a slower pace from 2020 for climate and other environmental reasons. The CSO June Livestock Survey shows that between June 2014 and June 2020 dairy cow numbers increased by 341,300 (28%), while other cows reduced by 145,700 (13%), which impacts on the breed and conformation of animals which will be available for the beef industry.

The beef industry requires animals which have strong beef breed characteristics, and meet the needs of the market. In addition, because of the seasonal pattern of milk production, the bulk of calves from the dairy herd are born in a short period in the Spring, which can create over supply when these animal mature.

Can producers find a way to organise the breeding of animals with strong beef traits, and ensure that the supply is spread to meet the needs of the market?

The producer price for beef in Ireland and the EU has been static since the beginning of 2014, as illustrated in the following table.



Country & Type	Saturday, 29 December 2018	Saturday, 28 December 2019	Saturday, 26 December 2020
EU + Young Bulls	€ 3.76	€ 3.65	€ 3.65
IE + Steers	€ 3.70	€ 3.55	€ 3.74
UK + Steers	€ 4.00	€ 3.97	€ 4.11

Source: Bord Bia

The Big Three

After bilateral talks with representatives from the Irish meat factories, there was an air of positive reaction from the Industry. Albeit it was also pointed out that these private factories employed agents who by in large were doing a very good job in the sourcing and purchasing of cattle.

The smaller factories mainly with one processing plant were not as interested as they felt the numbers on offer organised by a producers group would be too large to handle. All were quite clear on building factory farmer relations in the future and the greater need for knowledge transfer to farmers about the industry including in and out of date specifications for cattle, weights and grades. Also the need for the new generation starting farming to embrace technology is vital.

Kepak – ABP – Dawn

Kepak formed the KK Club in 1995, which was Ireland's first producer group to link producers, a processor and a customer in a tri-partite agreement. The KK club has now 40 member farms and is focused on producing beef for the Italian market. In addition Kepak were the first processor to set up a marketing and processing alliance with the certified Irish Angus Producer Group in 2017. This group started with six farmers and now has over 8,000 members.

It is positive for the industry for farmers to work together. Supply from producer groups generally is positive for both processors and producers when a good working relation is formed. Kepak, Dawn and ABP Food Group are all supporters of producer groups and are open to working with producer groups in the future. It was also suggested that the setting up of groups benefited the farmer a lot more than the factory if they were well organised. Frank Clarke of Kepak, Athleague believes that some agents are better than others, which is why the co-ordinator needs to know the stock, and that they will meet the required grade. Otherwise, both farmer and factory will be disappointed.

The consolidation of the meat industry in Ireland has continued, so that three processors control 60% of the national kill. This is a further reason for farmers to organise themselves.

The Goodman Group is the largest beef processing company in Ireland i.e. ABP. It is an example of a large processing company working with the producer group Irish Hereford Prime. This group was established by pedigree Hereford breeders and beef producers in 1997 with a very clear objective to expand the market both at home and abroad for Irish Hereford prime beef. It has now expanded to over 2,500 members with a vision to drive the supply and demand for superior quality Hereford beef among leading chefs throughout Europe. The ABP group processes these Hereford cattle at their plants in various locations in Ireland.

Literature Review

EU Study on Producer Organisations

In April 2018 the EU published '**A Study on Producer Organisations and their activities in the olive oil, beef and veal and arable crop sectors'.** (EU Commission 2018). EU Regulation 1308/2013 contains derogations from competition rules for the joint selling by POs and Associations of POs across all sectors of agriculture.

The reason for these derogations is that the negative effect of joint selling is offset by other efficiency improvements such as joint processing, packaging or purchase of inputs, which is turn helps to improve efficiencies.

This would lead to greater resilience and competitiveness of producers, thereby improving their position in the supply chain. This is consistent with the objectives of the Common Agricultural Policy (CAP).

This study conducted a survey of POs in which 226 organisations participated, 30% of which were from the beef & veal sector. Of those that participated in the survey, 36% were recognised as POs under the EU Regulation.

The survey found that the main motivation for setting up a PO relate to strengthening the market position of farmers through increased market access due to greater supply volumes and strengthening bargaining position between sellers and buyers.

However, other non-market factors, such as access to education/training and access to finance are also factors.

The market position is strengthened through production planning, joint selling and supply and price stabilisation. They also relate to product quality aspects such as technical assistance for product quality and production standards. Such functions are often accompanied by other functions such as promoting environmentally friendly practices and sustainable use of natural resources.

Over 90% of the organisations surveyed reported undertaking contract negotiation, production quantity and quality planning. They are also involved in distribution and transport, provision of equipment and storage, promotion and input procurement.

Survey respondents perceived that the activities of POs contribute to CAP objectives.

The survey found that the barriers most frequently reported as important were:

- Lack of support from government and other sector organisations.
- Lack of good examples of successful co-operation in the sector.

The survey also found other factors challenging the creation of POs such as lack of mutual trust, difficulties to incentivise membership and reluctance of farmers to give up their independence to sell directly to buyers.

It also found that the main challenges for commercialisation of products were:

- Weak negotiating power.
- Access to capital.
- Diverse quality of product supplied by members.
- Access to market information.
- Diverse interests of members.
- Lack of human capital.

A further study for the EU (EU Commission 2019) estimated that there were 3,434 recognised POs and 71 APOs in 25 Member States. More than half of these were in the fruit & vegetable sector. Over 2,000 of these were in three countries (Germany, Spain and France). There were 210 recognised POs in the beef & veal sector.

This study found that the incentives for farmers to join a PO were

- Strengthen the farmers' position in the supply chain.
- POs add value to the business activity of the members.
- Operating democratically helps to create trust in this horizontal co-operation.

Hooks et al Report

In 2018, Hooks et al produced a report titled '**Co-operation and Irish Beef Farmers: Current Perspectives and Future Prospects in the Context of New Producer Organisation (PO) Legislation'** (Hooks et al 2018). This report referred to the Irish Department of Agriculture legislating in 2016 for the establishment of beef POs to facilitate producers to collectively strengthen their market position. This was an action to address the power imbalances in the beef supply chain.

However, the uptake of the legislation by the stakeholders will determine whether this will make an impact. The sector has little or no prior experience of such organisations, and the paper analysed stakeholder views on the formation of POs.

The report refers to the direct association between POs and the pursuit of high value-added products. They also felt that arguments that increases in scale at farm level are associated with improvements in farm viability were tenuous. Therefore the focus should be on adding value to product, rather than increasing volume.

In the DAFM consultation in advance of PO legislation, submissions were invites and this study analysed these. Some stakeholders saw the need for a nationally co-ordinated approach in the establishment of an Association of POs (APOs), however, they did not emphasise the benefits of Interbranch Organisations (IBOs), which involved vertical integration with processors or retailers. Nor did they identify the potential of differentiating or premiumising beef products. Instead they identified the main threats to the future success of POs in Ireland as members' lack of commitment and processors lack of willingness to engage with POs.

The authors view on the submissions made during the Consultation can be summarised as

- Product differentiation/added value is overlooked

- Vision lacking towards full chain integration
- A focus on negotiating with processors (rather than vertical cooperation)
- A focus on setting up individual POs - few or no references to APOs or IBOs

NZ Lamb Producer Groups

Landon Jones produced a report on **The Role of Lamb Producer Groups in the New Zealand Industry**, (Jones, 2014), as part of his participation in the Kellogg programme. He looked at the positive role that producer groups played in the NZ sheep industry. He undertook interviews with stakeholders in one producer group, which included a major UK retailer, processors and farmer suppliers.

Jones identified key factors which determine the strengths of a lamb producer group and the opportunities that are going to enable the producer group to meet future demands of the consumer. Strengths included (1) Transparency of information (2) Relationships, which bring openness, frankness, trust and collaboration (3) Linking the farmer directly to the market (4) Data gathering, sharing and benchmarking improves performance (5) Certainty of supply for both the customer and processor at least 12 months in advance.

The key opportunities were (1) Using existing research data to help improve on-farm performance (2) Vigorous benchmarking within the group (3) Reduce wastage throughout the supply chain to unlock additional margin (4) Make more use of producer group lambs for the existing programme or other key customers that have the same consumer requirements (5) Stay ahead by being involved with research & development projects that differentiate the processor by creating a point of difference (6) Provide more transparency of margin within the group to build more confidence and trust from all stakeholders (7) Develop longer term price contracts for the farmer.

Jones concluded that the producer group helps the value chain to address the seasonal peaks and troughs in supply, and reduces price volatility. There must be a margin for farmer and processor, and there will be a premium from the market for safe, high quality product which meets welfare and farm assurance standards. Producer groups have a role to play to add value and increase profitability and stability for farmers and processors.

Legal recognition of Producer Organisations

The legal basis for beef Producer Organisations derives from the EU Regulation on Common Organisation of the Markets for Agricultural Products (EU Reg 1308/2013) which could be implemented nationally through a Statutory Instrument when a desire from stakeholders exists for such beef PO's.

This Regulation permitted Member States to introduce legislation permitting the setting up of Producer organisations in a variety of agriculture sectors, including beef. The Regulation set out the conditions under which producer organisations could be formed and the requirements that must be met in order to be recognised.

The rationale for the provision for producer organisations in the agri-food sector was to strengthen the position of the primary producer in the supply chain, by enabling collaborative working and marketing practices and collective negotiation on prices outside of normally applicable competition rules.

The EU Regulation which allows the operation of POs, also allow the creation of Associations of POs (APOs) which are a horizontal collaboration of a number of POs.

In addition, the Regulation allows for vertical integration between different groups within the supply chain, such as producers, processors and retailers, in the form of Interbranch Organisations (IBOs). This allows collaboration between different parts of the supply chain to enable best practice and transparency.

Department Consultation

In 2014 the Department of Agriculture, Food and Marine invited submissions in a public consultation on Producer Organisations in the Beef Sector. Submissions were received from representative farmer organisations, the meat industry and producer groups, Teagasc, ICBF and Bord Bia. The submissions covered legal structure, member commitment, minimum and maximum number of members, minimum and maximum number of livestock to be committed, whether members must commit to supply a single PO, requirement for members to supply a multi-year plan, quality, market specification and how the PO would operate.

National Legislation

In 2016, SI No 49 was adopted and set out the details of how the EU Regulation on PO's would be implemented in Ireland. The SI primarily sets out the Minister's authority to approve and maintain a register of Producer Organisations in the beef sector. It lays out the criteria and objectives of Producer Organisations as set out in Commission Regulation 1308/2013 around composition (minimum 20 members etc.) governance rules and reporting requirements. It also sets out the Minister's powers and responsibilities in relation to inspections. The Legislation provides that an active beef producer can only be a member of one Producer Organisation.

The difference between a Producer Organisation and Producer Group

The primary difference between a Producer Organisation and a Producer Group is that a registered Producer Organisation, as a distinct legal entity, may negotiate on price on behalf of its members collectively. The legal entity can be in various legal forms such as a co-operative or a company.

As producer groups are not required to register with the Department, there is no figure for the exact number of groups. It is unofficially estimated by the Department of Agriculture that there are a few hundred groups, mainly in the beef and sheep sectors.

What supports are available to set up a Producer Organisation in Ireland?

Currently the supports available are grant aid of up to €3,000 per group in respect of advisory costs for establishing the group from Department of Agriculture Food and the Marine approved facilitators. The Commission are examining, in the context of the next CAP, the possibility of extending supports to operational programmes around marketing and supply management which will be available to groups on an ongoing basis. It should be noted that these supports, should they be implemented, will be applicable to Department registered Producer Organisations only.

Steps to set up a PO

The four steps to set up a registered PO are

1. Form a group of at least 20 beef producers, who share a willingness to work together.
2. Draft up and vote on an organisational structure.
3. Register as a legal entity.
4. Report annually to the Department of Agriculture, Food and the Marine.

To date, there are two registered POs in the beef sector in Ireland, namely Emerald Isle Beef Producers CLG and Glasson Beef Producers (T/A Irish Beef Producers). There are five POs in the horticulture sector.

By mid-2017 in the EU, there were 3,434 POs and 71 APOs recognised by the national authorities across 25 Member States. Over 50% (1,851) of the POs in the EU are in the fruit and vegetable sector, and 210 in the beef & veal sector. About 60% of the recognised POs/APOs are in three member states (Germany, Spain and France). (Source EU / Arcadia)

Is there a role for Co-operative Livestock Marts to support POs?

In Ireland, co-operative livestock marts account for about 2/3rds of the sales through Livestock Marts. They have a long track record, most of them starting operations in the 1950s and 1060s. They are owned by livestock producers, operate on co-operative principles and have a wide geographical spread.

The co-op marts are trusted by farmers and have a Board, governance and management structure already in place. Some co-op marts have diversified into other rural related services such as property auctioneering and leasing services. Some co-op marts have co-ordinated the assembly and export of live cattle, as a service for their members.

Co-operative livestock marts are similar to POs in that they are user owned, and user controlled. They are familiar with the sector, and have permitted producer groups to use their facilities, such as assembly and weighbridge services for livestock.

Co-operative marts could provide support to assist the formation of a PO by providing access to facilities and management expertise. This could be done on a fee paying basis, with the conditions covered by a contract.

Case Studies

Case Study 1 - Colorado

As part of our Global Focus Programme, the author visited the state of Colorado in the US. The author stayed at the Colorado State University at Fort Collins. During the visit, a number of water irrigation projects were visited. The author also visited a unique Beef and Lamb Producer called 'Double J Lamb and Beef'. It was run by Jeff Hasbrouck at 13784 highway 14.

It began as a lamb Producer Group. Later, Jeff saw an opening for beef as most of the farmers he was dealing with also reared cattle. There are 110 members in the group, with members taking equity at a price of $22 per share. All shareholders had equal voting rights or say in the group.

The farmers were mainly from the state of Colorado, but also as far as the neighbouring states of Nebraska and Wyoming. Colorado is a very dry state which is mainly irrigated from snow melted waters from the Rocky Mountains.

So the art of finishing either beef or lamb is limited to two options. The first is to graze them on extensive pasture in the summer heat and the second is to feed on a high meal finishing diet.

Farmers or producer members have also two options when selling through the group. They can sell direct through the group from their own farm or feed lot. The second option was that the group provided a feedlot service via the farm of Jeff Hasbrouck. When the author visited there were 60,000 lambs on the feedlot and 5,000 head of cattle.

The cattle entered the feedlot between 50 and 100 days out from slaughter. The farmer was then charged 45 cent per head per day for the cattle and 5 cents for the lambs. This was an additional charge on top on the feed cost to cover the cost of running the group.

The cattle were slaughtered at 650kgs live weight out of the feedlot and were feed on a diet of soya hulls, distillers and flaked maize. The cattle were sold on a grading system, with farmers with better quality stock getting rewarded by way of bonuses.

All beef and lamb were sold to the beef giant JBS in the state of New York, where fresh meat is in demand by supermarket and restaurants. The lamb has its own branding called Mountain State Lamb and was selling quite well under this brand and as of the time of visit there was no brand name for the beef.

The **key learning** to be taken from this case study is that farmers have successfully joined together in the form of a feedlot to achieve a higher price and valve for their animals, and made a success of this collaboration. They operate as a co-op, with share equity, equal voting and providing a service to members. Their produce was processed and sold as a branded premium product.

Author at Mountain State Lamb Holding

Mountain State Lamb Holding

Case Study 2 - The Irish Angus Producer Group

The Angus breed and brand is world renowned among supermarkets and consumers. The Irish Angus Producer Group is Ireland's largest producer group. It has been in operation for over 20 years. The group was formed by 6 Angus breeders. It was set up with the aim of promoting and marketing the sale of Irish Angus beef from the national herd.

The group was formed by 6 Angus breeders. Their aim was to co-ordinate the production of their unique product on the Irish market. They formed a processing alliance with major beef processors. These included Kepak and ABP with cattle being processed weekly.

Angus beef as a brand name has all the hallmarks for the consumer including fast maturing and marbling in the meat which ensures its natural taste, flavour and tenderness. Its farmer membership, spread across the island of Ireland are certified and accredited Irish Angus beef producer.

The group oversees the supply and slaughter of these quality livestock on the factory floor, under clear arrangements with beef processors. This has benefits for the farmer, processing plant and the supermarket which sells the product.

To become a member of the group there is a €100 membership fee. The farmer must be or become a member of the Bord Bia Farm Quality Assurance Scheme. The farmer will then receive a Producer group member number.

In order to qualify for the bonuses, all cattle must be sired by a purebred Angus Bull and all animals must be polled.

Members who breed these cattle must maintain adequate records. The animals must be booked in for slaughter through the producer group office in Cavan or by the procurement manager of the factory that process these animals. There are bonuses paid on the right type of animals which can be viewed at the end of this section.

The premium paid is included in the factory payment. A deduction of €6 per head is deducted from each carcases processed to fund the group.

The animals are processed in the following locations- ABP in Bandon, Cahir, Nenagh, Rathkeale, Waterford, Kepak in Athleague, Cork, Ennis, Clonee and Kilbeggan.

The Kepak group have worked with the Angus PG from the outset with the ABP group coming on board in the year 2000. The supermarket Tesco have also come on board to promote Angus beef. They are now an important part of the partnership.

Bonuses

The rate of bonuses or premiums paid depend on the time of the year. Higher bonuses are paid for off season and are payable at two different times of the year. The standard premium is 10c/kg rising to the off season premium of 20c/kg.

The bonuses are paid on steers with a weight range of between 230-380kgs and heifer between 220-380kgs carcase. All animal have to be under 30 months of age. The bonus only applies to animals which made the grade and correct fat cover. This only includes animals between U + 2+ and O= 4= . In addition there are also higher payments available to members who commit to supplying higher quantities at requested times.

The Angus breed has been growing steadily in Ireland in recent years due to the increase in the dairy herd as farmers favour the breed for easy calving and short gestation. The finisher has also chosen the breed due to the early maturing date of the finished animal.

The **key learning** from this group is that it has focused on a particular breed, and has made a success of this collaboration. It is professionally run and has a farmer base right across the country, with processing plants in partnership in equally well placed locations.

The group is not involved in the individual transportation of the animals which frees up time for administration of the group. The group has a lot of work completed in sourcing these animals for the factory, hence it is in the processors best interest to continue the partnership.

The following are two examples of the worthwhile bonuses that can be achieved through The Angus Producer Group.

Examples

ANGUS BULLOCK

Average carcass weight 360 kg

Standard Premium	@ 10c/kg	=	€36
+ Quality Assurance	@ 12c/kg	=	€43
	TOTAL VALUE	**=**	**€79**

ANGUS HEIFER

Average carcass weight 270 kg

Standard Premium	@ 10c/kg	=	€27
+ Quality Assurance	@ 12c/kg	=	€32
	TOTAL VALUE	**=**	**€59**

Case Study 3 – Offaly Quality Lamb Producer Group

The Offaly Quality Lamb Producer Group is an example of an excellent well-structured group. The lamb group has been together for almost 40 years and this could be attributing to the well organised and democratic working of the group. The group is based in county Offaly but has members in the counties Tipperary, Galway, Westmeath, Laois and Kilkenny.

The group was one of the first in the country to start and has grown its membership to around 100 farmers covering 6 counties. It is a pre-condition of the membership that the lambs are marketed through the group are produced to a high standard to conform to the co-op’s rules on husbandry and welfare.

It was founded as an early lamb Producer Group selling four to five thousand lambs per year. In 1990 the group registered as a cooperative society under the umbrella of ICOS, by which time the group was trading 26,000 lambs annually. The Group was the first in the country to get E.U. funding under the Producer Group Regulation.

The Group has 140 members with flocks varying in size from 50 to 800 ewes producing over 20,000 lambs annually. They supply Irish Country Meats in Camolin who in turn market the groups lamb to Superquinn, Dunnes, Aldi and also the French supermarket chains.

All these supermarket chains place a high value on the idea that they are supplied by a farmers’ co-op and can market this to the consumer by way of packaging medium. The author found the **key feature** of this group to be the excellent governance and communication between the committee and its members.

Fahy Haulage - Haulage company utilised by Offaly Producer Group

Case Study 4 – New Zealand - David Kidd

David Kidd farms near Helensville north of Auckland in New Zealand. He runs a beef fattening farm mainly off grass. He purchases calves from the dairy herds and also Aberdeen Angus cross at 6 months of age from the suckler herd. He finishes these animals at about 18 months of age. David is a member of a producer group in New Zealand.

The author found that groups are not widely used in NZ because most farmers have sufficient scale on their own and can fill a truck load of stock when dealing with a factory. That said, he sees the meat factories as a manufacturing business with large weekly contracts with retailers; and in turn a Producer Group of sufficient scale that can guarantee product on a regular basis.

Another example of an excellent food company in New Zealand that relies on Producer Groups is Anzco Foods. Producer Groups were first introduced there as the foundation for the building and development of long term partnerships between selected beef and lamb producers, the processing company and international customers.

It is a testament to the success of these groups of the many long term partnerships that have developed as a result. The author has learned that these groups have focused on continuous improvement including best practices, business development projects, benchmarking and collective learning.

It was pointed out that critical to the success of groups has been the Producer Group Committees, made up of a combination of producer and company personnel which were established to ensure its members are involved in the decision making developments and the direction of the group.

Anzco Foods supplies large companies like Waitrose, Aleph Inc. and McDonald's. While travelling in New Zealand it was noted to the Author that for large meat processing or food companies to have sufficient livestock to fulfil contracts on a weekly bases, they need and are willing to work directly with professional run Producer Groups.

Case Study 5 – Scotland

The author travelled to Scotland for the Nuffield Triennial conference week, which included field tours on Dairy, Arable, Beef/Scotland, Sustainable & Organic enterprises.

Scotland is a thriving and diverse Agricultural entity, with great farms in scenic countryside. Scotland now has the highest premium price for their beef and cattle contributing to 29% of agricultural output in 2015. (QMS, 2016)

The Beef Scottish tour was the most useful of the field tours, including a visit to “Beef Improvement Group Ltd”, where “Stabilisers" (Stabiliser Cattle Company) were farmed. The Stabiliser breed offers an evolution of a modern cow in producing uniform beef cattle to facilitate higher premium beef price from the processer and customer. The Stabiliser is a cross breed of four different animals “4 breed composite” “Hereford, Red Angus, Simmental and Gelbvieh with an equal share of 25% of each breed. Bringing together of breeds with complimentary traits that are the best in their breed, capitalising on heterosis, hybrid vigour, and re-making the crosses regularly to maintain hybrid vigour.

The genetic merit of all breeds change relative to each other overtime. What happens is that the Hereford component was not pulling its weight so it has been dropped. Other breed populations are being sampled to see if they can strengthen the modern Stabiliser. If they can they will be included. This was achieved by the United States Department of Agriculture (USDA), Meat Animal Research Centre (Stabiliser Cattle Company).

This mainstream crossbreeding programme is designed to optimise profits in cow-calf and feedlot performance, whereby the Stabiliser breed once sired with a Leachman Prophet (low feed intake) Charolais or Belgium Blue. This set the origin of the breed to yield a “moderate frame functional cow”, leading to ease of calving, good scrotal circumference in bulls, growth and carcass traits and early puberty. (Stabiliser Cattle Company)

The Stabiliser Cattle Company established a “BIG Integrated Production Model”:

- 12 – 14 month Bulls finish
- 16 – 18 month Steers finish
- Premium Price
- Producer Benefits
    - Bulls 20% more efficient than steers
    - 30% more cows
    - €395 financial gain/cow in a 100 cow herd
        - 12% more calves reared
        - Calving interval reduced from 16 to 9 weeks
        - Heifers calve at 2 years
        - Reduced replacement rate from 22% to 14%
        - Feed, vet and labour savings
- Customer Benefits
    - Bull beef which is as tender as steer beef
    - Bull beef lower in saturated fats

The Production Model can be summarised as:

- Disciplined breeding programme
- Defined production blueprint
- Optimising performance/costs balance – Maximise Profits
- Consistent high eating quality beef. (Stabiliser Cattle Company)

This gives a very uniform product for the processor to deal with. The results of the Stabiliser breed is very predictable regarding quality and the size of animal produced. This gives the retailer i.e. Morrison's in this case, a very high eating quality product. It is marketed locally under the Givendale Prime brand.

The group also markets the breeding stock from the group internally and to farmers outside the group who are interesting in purchasing high end breeding stock.

The author found that unlike the Irish Angus Producer Group, this group focused on a breed from a regional location which he found to be the **unique selling point** of this group.

Case Study 6 – France

CODIVO-BOVICOOP is a French recognised PO in beef & veal production. It was established in 2003 when two co-ops merged. It has 1,600 members in the Puy de Dome and Allier regions in central France. They handle over 52,500 head of cattle annually, and have total sales of €62m.

The purpose of the COVIDO-BOVICOOP is to optimise the value of members' livestock. The co-op works with members to ensure that the supply matches the demands of the market, in order to achieve good prices, efficient production and better environmental impact.

The co-op provides technical and commercial support to help the members to achieve this, and has recruited specialists to provide a quality service to the members.

Some of the cattle which are purchased by the co-op, are sold on for fattening, mostly for export to Italy and Spain. Finished cattle (which account for 40% of the total animals handled) are sold to SICAREV, in which it is a shareholder. SICAREV is a beef and sheep processing co-operative, which is owned by six co-ops, including COVIDO-BOVICOOP. Over 70% of the cattle which are slaughtered are supplied by the members of the six co-ops that own SICAREV.

SICAREV brings more organisation to the supply chain for the farmer owners, and supply and demand is better managed. The processing co-op gives farmer members accurate feedback on what the market needs, and helps farmers to adapt their production to customers' needs in terms of weights and conformation.

In addition to commercial activities, the PO supports the members through

- Quality Control – ensuring consistent quality.
- Production process – weight, age and quality objectives for finished animals to meet the market need.
- Technical and financial support for young farmers.
- Communication with members.
- Provide equipment and technical support.
- Supply of farm inputs and services.

The message from this case demonstrates the benefits of a well-run PO, which provides professional support to the members to help them manage supply to meet the market needs. It also shows the value of vertical integration with a partner which provides accurate market insights and supports producers to help them understand how they can improve and meet the market need.

Note: The author did not visit this PO and obtained this information from 'A Study of the best ways for producer organisations to be formed, carry out their activities and be supported - report prepared by Arcadia International E.E.I.G., EY and independent experts for the European Commission - May 2019' and the websites of SICAREV and COVIDO-BOVICOOP.

Success of Producer Groups

As can be seen in the case studies, the EU study on POs and the Teagasc study on Co-operation among beef farmers, the pros and cons of setting up Producer Groups / Producer Organisations can be summarised as follows:

The reasons for setting up a Producer Group or Producer Organisation are

- It allows better access to markets through the supply of a sufficient quantity of product, when it is needed, and to the market specification.
- It offers leverage for the group or organisation to negotiate supply agreements with buyers.
- It provides an opportunity for group members to bulk purchase their inputs.
- It enables the group to share access to technical knowledge, services and ways to improve their production performance indicators and risk management.
- Producer Groups or POs can invest in joint facilities that can add value (such as storage or processing of product). They can be the vehicle to enable vertical integration in the supply chain, either directly or through an equity stake.

The following are reasons why producer groups succeed:

- The group has a coordinator with empathy to existing and new members
- The group has a focus by members and management on the market place
- The group has good communicators, with ambition and ability to run complex business and has co-operative experience.

Pit Falls of Producer Groups

There is the risk that the producer group is not successful. From conferring with people involved in established groups the following are some of the reasons why groups do not succeed:

- Lack of leadership and governance
- Low level of member's commitment
- No clear direction or long term plan for the group
- Lack of management skills with little interest or ambition from the board and management
- Finance can also be an issue when setting up a group
- Communication between board and the group members can be a major factor if members are not kept up to date with the happenings of the PG
- The management not being able to respond to the market place or changing events quickly enough with no focus on risk or risk management.

As with any organisation that grows and becomes larger they inevitably become more complex business operations and difficulties may arise. If a group becomes very big members may feel their opinions and voice isn't being heard. Consequently they are more likely to become dissatisfied with the organisation and their commitment may fade. This may explain why smaller groups survive and in many cases members have a strong sense of loyalty and pride in their producer group. This commitment tends to be stronger with active members.

Another significant problem is with inactive members who are no longer using the services of the producer group. Inactive members are unlikely to be willing to commit to the group or provide any finance for the group and as a result these members have no commitment to the long term development of the group and they also may become a source of liability for active members or even worse they may believe and moreover may feel aggrieved that these members are benefiting greatly from the efforts of the active members or other benefits from being a member or associated with the group.

For these reasons the author believes that a producer group needs to advertise and to be on the lookout for new members to develop, maintain and bring the group forward steadily. Also there are just simple reasons such as farmers retiring or exiting the business so hence have no active membership of the group, but could be a donator to the group.

Use of Technology

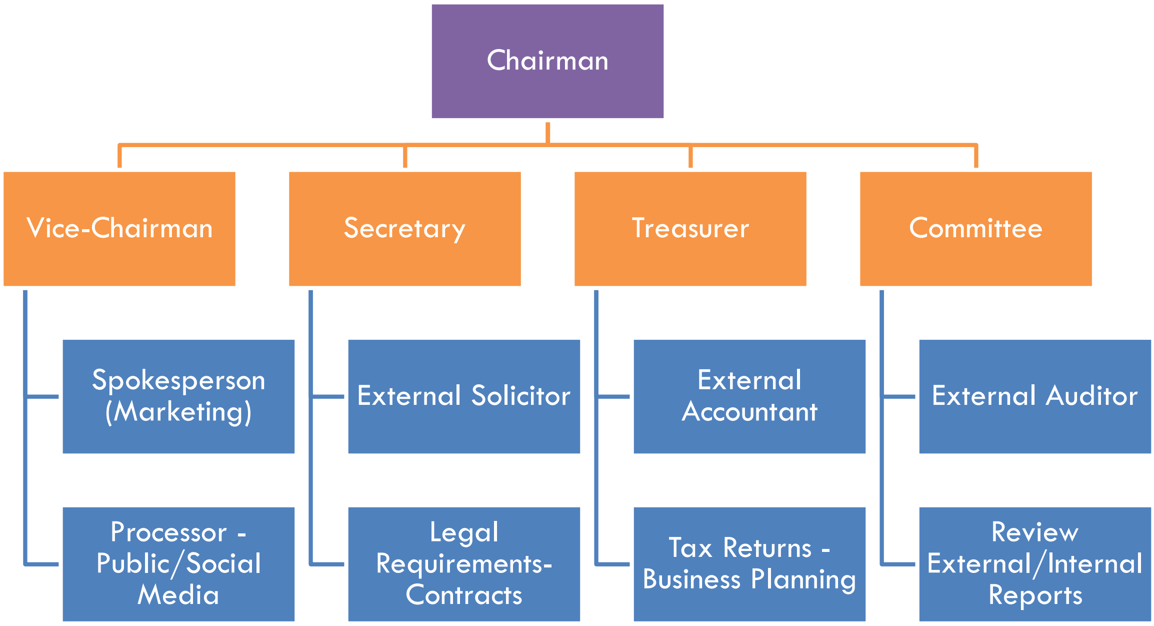
Modern communication methods made communication between the members easier. Group chat apps, email and even video conferencing technology is available to allow the chairperson and group co-ordinator to keep the members informed of events, statutory meetings, information meetings, market developments and better ways to do business. This facilitates planning and allows the members to adapt to the needs of the market.

Precision Farm Management Cloud Software applications such as www.prefarmmcloud.com for recording all types of farming activities at the touch of a button, on all types of devices is proving very useful in the tracking of farming tasks and finance which produce report generation in the form data analytics of tables, charts and file saving reports, in order to retain a business data bank asset of historical events to assist in foresight and spot trends for current and future business planning.

Beef Producer Group Setup Concept

As a result of the author's travels and subsequent research into the setting up of a PG he found that good governance in both the initial set-up and day-to-day running of a PG is essential to their success.

The diagram below reflects the general structure of a Management Committee in a successful PG:



General Producer Group Setup Strategy:

(Bright, 2014)

1. Minimum number of members is 7 to form a cooperative
2. Articles of Memorandum and Association objectives of the cooperative
3. Agree on the level of share capital required from members
4. Minimum two board of directors that are not member producers
    a. Qualifications/Experience Corporate Governance & Business sense
5. Elected Producer directors must undertake skill training to operate a cooperative
    a. Course training with Bord Bia or Smurfit Business School UCD
        i. Emphasis Skills: Negotiating, Conflict Resolution, Communication
6. Draw up Membership contracts outlining members and cooperative obligations to each other
    a. Contract includes EU and DAFM relevant regulation obligations
7. Allow for Additional members over time
8. Research bulk member purchasing power and trading
9. Negotiation of prices for member's produce
10. Apply to the DAFM for PG recognition and approval along with a 3 to 5 year business plan with assistance from Teagasc, Bord Bia and DAFM
11. Upper member limit is 15% of the national production in tons rather than member count
12. The co-operative should be setup as a commercial legal entity with structure

    a. Board of Directors
    b. Governance
    c. Democratic Accountability for members – Reg (EU) No 1308/2013 – Article 153
13. Planned production and adjust to demand – quality & quantity
14. Members should have a Supply Concentration of products and its presence in the market , by direct and indirect market methods
15. Research & Development, Marketing and Promotion in conjunction with Meat Industry Ireland, Teagasc, Bord Bia, IFA and Macra Na Feirme perhaps by an Association of the Producer Group.
16. Required by the Producer Group members for active participation in the contractual negotiations i.e. pricing, premiums and processor groups
17. Full National Scale deployment of Producer Groups for optimisation of the Organisations, requiring direct support and long term commitment by the Government, DAFM, Teagasc, Bord Bia, all stakeholders and all associated members
18. An overall PG national perspective plan in the Terms and Conditions of the scheme, which could be facilitated by the IFA.

Associated Costs of Setup and Running the PG

(Bright, 2014)

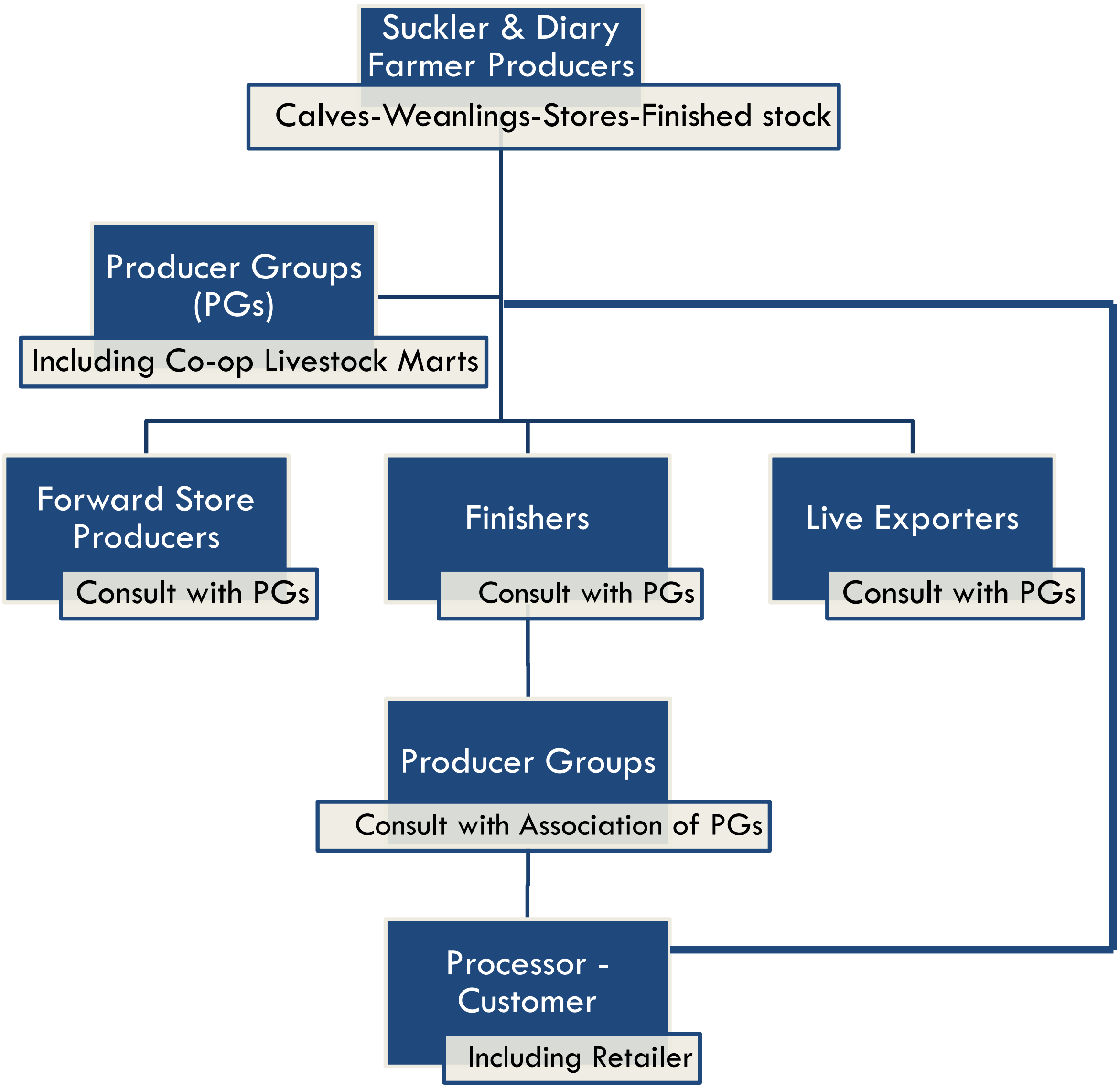
1. Legal, Accounting and Consultancy Fees
2. Ongoing Administration Costs (0.5 to 1% of turnover) – trading activities –monitoring and control of EU compliance
    a. Possible member state reimbursement of some costs from the EAFRD
        i. May be applicable to Teagasc advisory fees
3. PG must be at a reasonable scale to burden the costs.

Suggested Timeline of Setup and Running the PG

(Bright, 2014)

1. **3 to 5 year plan** of Producers selling Production through PGs
2. **1 to 2 year plan** of PGs being recognised, functioning in all areas of the country for young stock producers and beef finishers
3. **6 to 12 month plan** of informing producers of the PG by workshops, seminars and meeting, with outlining the issues involved in establishing a Cooperative
    a. Start recruitment process
4. **3 to 6 month plan** of introducing CMO regulations – Setting up the PG system –Terms and Conditions on drafted and agreed on a national scale with stakeholders under the PG system operation
5. **Present to 3 month plan** to Introduce CMO provisions for setting up a PG system for the DAFM and Stakeholders to sign off on and agree on the proposal.

Schema of National Framework for Producer Groups (Bright, 2014)



Conclusions

Research shows that, over the last 20 years, farmers and industry stakeholders together with state agencies such as Teagasc, ICBF, and the Department of Agriculture have really evolved the industry as regards technology, grassland improvement, breeding and traceability but very little has been done on the marketing of beef cattle at farm gate level.

The author believes that now is the time for farmers to become more organised in the selling of their produce. Too often these transactions are completed too hastily when events such as weather, banks or feed availability becomes an issue and farmers can panic sell.

The author believes that the setting up of beef producer groups will help farmers coordinate the selling of their product more efficiently and with a better return for the farmer. Beef farmers selling a small number of animals at irregular times have no real bargaining power. However, as a group they can coordinate, assemble and market their beef or lamb while meeting a market need and achieving a better price. As documented in the author's case studies this method of selling beef is more productive than farmers selling as individuals.

The case study examples in this report show that a group of farmers, with a clear view of their unique selling point (which could be 'grass-fed', or from a geographical region, or a specific breed, or sustainably produced, or reared in a specific way) can be successful. If they can supply on a schedule that meets the need of the market, they will be in position to negotiate a contract with a processor who can pay a premium and give them a secure outlet for their finished animals.

These are good examples of successful arrangements between producer groups and processors, showing that this can be done in a way that is a 'win-win' for all.

While most producer groups and POs are in other sectors, such a fruit and vegetables, the beef and sheep sector can learn from the other sectors in order to show the benefits of producers organising themselves in this way.

It is also clear from the case studies, that the group or PO has a role, not only in negotiating price and supply arrangements, but in providing specialised technical support so that producers can improve their production system, share facilities and improve their profitability.

It is also clear from the author's study that producer groups need to have good governance and should be well structured if they are to be viable. They will need a Coordinator (Facilitator) who with excellent people skills, a chairperson, treasurer, and a secretary, and a democratically elected board. The board should develop the group and develop regular communications with members.

Producer groups have to build up the trust of both the producers and the factories and this is likely to be a gradual process. The benefit of the arrangements as a group should be 'sold' to the members as wider than a price premium, with a significant benefit from technical support, improved methods and making use of research (grass, breeding, nutrition etc.).

The author believes that a producer group or PO should have a minimum of 25 members, and all farmers should be part of the Bord Bia Farm Accreditation Quality Assurance Scheme.

Producer groups that stay with a factory tends to do better in the long run as the need to build a relationship with a factory cannot be overemphasised in order to enable the group to sell or move cattle when there is a surplus of stock in the market place.

The benefit for the factory involved with a PG is that it provides them with a consistent supply of animals finished to their preferred market specifications or animals of a particular breed, age or carcass range to meet specific customer's requirements. Factories can collaborate with a group of likeminded farmers to produce these specifications. The Angus Producer group is an excellent example to fit into this requirement. It draws on its extensive member base of 8,000 members who continually supply in-spec carcasses all year round and pay high bonuses to encourage out of season supply which is very important for the processor side.

Other breeds of cattle could also be marketed on this basis i.e. Limousin and Charolais cattle which have their own unique selling points. The Limousin Cattle achieve bonuses of 5 cent per kg in Ashbourne Meats, Roscrea, so the author believes it would be an advantage to market these cattle through a group.

Producer groups should be actively promoted and encouraged to inform non group members of the benefits and attractions of a Producer Group. A Producer Group should be also used as a marketing tool by meat factories to show customers that the best practice is being used in animal welfare, food safety and fully traceable. Perhaps there should be a National Producer Group Unit to represent the voice of all the regional Producer Groups.

The author strongly agrees with the following opinion expressed in the Bright Fields Consultancy report that 'the continuation of the current status quo is probably unsustainable. Producer Groups provide the best mechanism to ensure a sustainable future for the beef and cattle producers in Ireland'. (Bright, 2014).

Recommendations

1. There is a need for an independent umbrella body to support and represent new and existing PGs and POs. This would include advice on set up, development and representation. This would give the opening for groups to get off the ground that might be struggling at the initially stages.

2. Increases funding from the once off grant of €3000 to €10,000. While this is hugely welcome the author believes it is too small a sum for a once off payment. It would encourage more PGs to register as POs and become more professional in the industry. New groups will need to get legal and financial advice and possible invest in technology.

3. Use the structure of the mart network throughout the country. It could be used as both the administration and assembly points for PGs and POs. This would be on a fee payment basis and would not conflict the existing business, but would increase throughput and strengthen their business.

4. Farm organisations, ICOS and industry stakeholders should be encourage the setting up of PGs and POs as set out in their submissions to the DAFM Consultation on POs in 2014. They should be supported by state agencies such as Teagasc, ICBF and the Department of Agriculture to progress the industry by encouraging the setting up of PGs and POs.

5. Farmers can collectively come together to form PG from existing BTAP discussion groups. It is a starting point for a group as members have already a relationship built up.

6. PGs and POs should engage with Meat Industry Ireland to highlight the opportunities of factories embracing the encouragement of POs. New or existing markets could be developed and capitalised by the development of a group to supply a premium product under a breed or regional label.

7. "The continuation of the current status quo is probably unsustainable. Producer Groups provide the best mechanism to ensure a sustainable future for beef and cattle producers in Ireland".

(Bright, 2014)

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