



Dairy NORTHERN
UK IRELAND

GOING FORWARD
NORTHERN IRELAND'S
DAIRY AGENDA

THE UNITED VOICE OF THE DAIRY INDUSTRY

FOREWORD



Dairy UK is the united voice of the dairy industry.

Dairy UK brings together dairy processors, farming representatives, co-ops and doorstep delivery businesses in an organisation that exists to articulate the views and concerns of all those involved in the dairy industry.

The dairy industry is a vital segment of the UK food sector that is responding dynamically to the challenges facing it. Major changes have taken place to adapt the industry to the wholesale transformations that have occurred in our market place and international trading environment.

The industry has striven to achieve much greater efficiency throughout the sector at both farm level and in processing. This has involved sustained rationalisation of dairy farms and major investment in new state of the art processing capacity. The structure of the industry is being remodelled to create much closer co-operation and collaboration throughout the supply chain. The same impetus behind this process of restructuring informed the creation of Dairy UK as the single united voice for the sector.

To take on successfully the challenges of tomorrow the industry needs a close working partnership with government. Consequently Dairy UK has prepared this document which sets out the policies we believe need to be implemented in order for the government to give the industry the support it requires.

At the same time the document concludes with a statement of the range of strategies the industry is pursuing in order for it to sustain itself in the future.

We welcome feedback on the issues raised by this document and if you have any queries or concerns, please don't hesitate to contact us.

Sir Don Curry
Chairman of Dairy UK

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01 THE IMPORTANCE OF THE NORTHERN IRELAND DAIRY INDUSTRY



The prosperity of the Northern Ireland dairy sector has major economic, social and environmental implications for Northern Ireland.

There are 4,000 dairy farms and over 2,000 employees in processing and distribution. Milk and dairy products are the largest sector in the Northern Ireland food and drinks sector. The industry is highly reliant on exports of dairy products to Great Britain, Europe and to many countries outside the European Union.

Dairy farmers play a major role in maintaining the current rural landscape. The dairy industry's products form a major part of the diet of consumers and they provide clear and substantial nutritional benefits.

The sector is subject to the intense price pressure created by the market driven economics of the food industry and the reduction in price support created by the reform of the dairy sector Common Agricultural Policy (CAP). Consequently processing margins are constantly under pressure and returns to many dairy farmers are below their costs of production.

UK and European Union (EU) policies and regulations touch upon almost every aspect of the sector. The scale of regulatory involvement in the life of the industry means that it needs the active engagement of government to achieve its commercial objectives. In particular the Northern Ireland dairy industry is very concerned about the effect that the Nitrates Directive will have on milk production.

Jim Begg
Director General of Dairy UK

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02 ECONOMIC ISSUES

CAP Reform

Issue

It is believed that the current round of CAP reform for the dairy sector may be insufficient to make the CAP compatible with any future World Trade Organisation (WTO) agreement. The continued existence of a significant price differential between the EU and the world market could be incompatible with the degree of tariff reduction that may be created by a WTO agreement. Further reductions in price support may, therefore, be advocated by the European Commission to create a closer alignment between EU prices and world market prices.

Dairy UK Policy

Time needs to be given to allow the effects of the existing package of reforms to be worked through and the industry itself needs to be given time to adapt to those effects. Careful and exhaustive consideration of the policy options facing the EU dairy industry would then have to be undertaken before the EU embarked on a further reform of the CAP.

Only when all of these steps have been undertaken should a further round of reform be initiated.

If further reform resulted in additional reductions in price support then funds need to be made available to ensure that producers would be fully compensated.

Why

The impact of the current round of reform on the industry's commercial environment is uncertain. Northern Ireland's main export products are milk powder and butter and the cuts in intervention prices for these commodities as the result of CAP could directly impact on the price paid to farmers.

The range of raw milk prices conceivable as a result of the current round of reform is close to the costs incurred by average UK producers. In order to be profitable in the environment created by CAP reform, the industry will need to undertake further restructuring. This will take time. Proper evaluation would then have to be given to the reform options available to the EU.

Further reductions in price support without additional compensation would be inequitable. The EU budget is under pressure and it would be necessary to ensure that funds were available before further reform was undertaken.

WTO Negotiations on Agriculture

Issue

The current WTO Negotiations on Agriculture in Geneva are aiming for cuts in import tariffs to improve market access, elimination of all forms of export support and reductions in domestic support.

Dairy UK Policy

The framework created by the CAP requires the EU to retain sufficient tariff protection to continue to manage imports into the EU.

Reduction commitments for dairy export subsidies should be based on total expenditure on subsidies and should be gradual. The phasing out of export subsidies should be consistent with the timetable for any further reform of the dairy sector CAP.

Why

EU dairy product prices are expected to remain significantly above world market prices for the foreseeable future. If the EU is to manage the evolution of prices for dairy products within the EU, then it must be able to manage the volume of dairy products imported into and exported out of the EU. Inability to do either could result in a collapse in EU prices.



Management of imports requires the retention of adequate tariff protection. The continuation of exports requires the provision of export subsidies in order for EU products to be competitive on the world market.

Reduction commitments for total expenditure on export subsidies for all dairy products will provide the EU with the flexibility it requires to continue to manage its exports.

The timetable for the elimination of export subsidies must be consistent with the future reform of price support provided by the CAP because the EU's dependency on export subsidies will be determined by the price levels created by CAP reform. In particular, the dairy industry in Northern Ireland would like to see the retention of export refunds for as long as possible.

Skills and Training

Issue

Both processors and producers are encountering increasing difficulties in securing the type of labour they require. Whilst unskilled labour is generally available, particular difficulty is being encountered in obtaining skilled labour. The industry is becoming increasingly reliant on foreign labour to fill its vacancies and using its own resources to undertake training to rectify the shortage of skilled labour.

Dairy UK Policy

The government's education and skills policy must place greater emphasis on vocational training.

The government should contribute to the provision of training by the industry and to support Sector Skills Councils, which respond to employer needs and enable the creation of demand driven education and skills provision.

Why

Labour is a major component of industry costs and the availability of the right type of trained labour is central to the industry's success. Employers need improved access to the skills that are meaningful to improved productivity and profit.

The historic under-investment in vocational training is still continuing to adversely affect the

economy and too much of the training that is available is not designed to fully meet the needs of employers.

With extremely tight margins the industry is placed at a competitive disadvantage if it is compelled to undertake its own training to make up for the deficiencies in education policy.

Competition Policy

Issue

Markets within the dairy sector, and within the food processing and retailing industry, only work effectively if competition authorities actively ensure that they are sufficiently competitive, that trading terms are stable and consistent and that no one element in the supply chain becomes dominant.

Dairy UK Position

Intervention by the competition authorities should be timely and effective to maintain competitive and balanced markets, firstly for raw milk in the UK and, secondly, between the food processing industry and retailers.

Competition policy must also be mindful of the international dimension to the dairy industry's markets.

Exclusive weight should not be given to one set of interests when determining competition policy. Suppliers should be given the same recognition as consumers in the determination of competition policy.

Dairy UK supports the development of a 'Buyers Charter' that has been proposed by the National Farmers Union (NFU), which would create a gold standard in trading practices between suppliers and customers.

Why

The response by the UK's competition authorities to imbalances in the food industry has often been too slow. Deliberation on the issues involved has been used as an excuse for delay. This creates uncertainty.

The importance of the EU single market to the dairy industry means that competition policy in the UK cannot be conducted in isolation from the competition policies pursued by other EU members. UK dairies must not be prevented from being able to compete on an equal footing with the large dairy enterprises that have emerged in the EU.

The exclusive emphasis given to consumer interests by the UK's competition authorities can damage the industry's long term productive potential.

Over Thirty Months Rule

Issue

The government has recommended the lifting of the over thirty months rule on cattle born after August 1996, providing that a robust BSE testing regime can be put in place. This will open markets for mature beef that have not been open to dairy farmers for some time. Previously cattle over thirty months old were removed from the food supply chain by the Over Thirty Months (OTM) Scheme.

Dairy UK Policy

Dairy UK welcomes the government's decision to lift the over thirty months rule for cattle born after August 1996 and would welcome the swift implementation of measures to facilitate its early removal, notably a robust testing regime for OTM cattle and a replacement scheme to deal with cattle born before 1996. Dairy UK also urges the government to put arrangements in place to deal with cattle born before 1996.



Why

The robust control measures that the UK has implemented since the mid-1990's have had a dramatic effect in tackling the level of BSE and consumer confidence in British beef. The UK has recently achieved the criteria for medium risk status in respect of BSE (in terms of cattle numbers affected by BSE) and therefore our incidence level is on a par with that in other EU member states. Removing the over thirty months rule allows dairy farmers access to potentially valuable markets for mature beef and dairy progeny.

Currency

Issue

The Northern Ireland dairy industry is directly affected by movements in the exchange rate. The dairy industry operates within the EU single market, which means that its products must be priced competitively with imports from the EU. This means that returns to the industry are directly influenced by variations in the sterling/euro exchange rate. These variations also affect the value of the market support payments provided under the CAP.

Dairy UK Position

Dairy UK would support the explicit adoption by the UK of a stable exchange rate policy. This could take the form of seeking to manage the sterling/euro exchange rate within a certain range. In the longer term the most secure means of eliminating exchange rate variations is to enter the euro at a rate that ensured that the industry was competitive and not subject to penalising cost or price pressures.

Why

A stable exchange rate would eliminate the risk to the dairy industry's income created by currency fluctuations. This would create a more stable environment in which to plan future investment decisions. It would also remove the risk of productive capacity being lost because of significant currency fluctuations.

An appropriate entry rate into the euro would be one that avoided the imposition of any further cost or price pressures on the industry and allowed it to compete effectively to realise its potential.

03 ENVIRONMENT AND REGULATION

Sustainability

Issue

Sustainability is now at the heart of the strategy being pursued by government, but in many respects the concept remains little understood.

Dairy UK Policy

Dairy UK supports the adoption of sustainability as a policy objective. However policy instruments must acknowledge the wider international market context that dairy farmers operate in. If the industry is to be economically sustainable then regulatory costs that cannot be recovered in the market place must be met by the government.

Why

The UK dairy industry operates in the EU single market. In order for it to achieve economic sustainability it must be competitive with its European counterparts, otherwise it will not achieve profitability, which is the pre-requisite of economic sustainability.

Policy initiatives in pursuit of sustainability must avoid imposing excessive regulatory burdens or additional costs on the industry that would undermine its economic sustainability.

If the industry is unable to compete, then production would be re-located outside the UK. This would mean that the UK would not be able to manage or achieve the social, environmental or economic sustainability objectives for the sector.

If regulatory intervention in the processing sector is to be undertaken it must be fully justified by the evidence available. The use of mandatory targets for the sector should be minimised as they necessitate complex and bureaucratic monitoring systems to ensure compliance. If targets are to be used then they need to be realistic and attainable.

Environmental Regulation at Farm Level

Issue

Environmental legislation will have a significant impact on dairy farmers in the coming years. Across the UK the implementation of Nitrate Vulnerable Zones is already affecting the sector, especially in Northern Ireland. The government has proposed extensive controls on the disposal of waste from farms and dairy farmers will have to meet certain environmental requirements as a condition of receiving the new Single Farm Payment.

The Water Framework Directive will require a major reduction in diffuse water pollution from agriculture. It is widely expected that the greatest burden of adjustment will fall on dairy farmers. The Northern Ireland dairy industry is concerned that controls on diffuse nitrate and phosphate pollution of waterways by dairy farmers must be implemented within the same timescales as the controls on other sources of pollution. The controls on stocking rates, slurry storage and closed periods for slurry spreading will result in many farmers ceasing or cutting back on milk production.

There is also concern over the different government agencies that may play a role in monitoring these controls and the difficulties this may cause.

Dairy UK Policy

Dairy UK recognises the need for milk producers to demonstrate environmentally sustainable practices in order to meet the needs of society with regard to the environment.

In delivering new regulatory requirements, government should avoid prescriptive regulatory constraints and use an educative and supportive approach to achieve greater awareness amongst dairy farmers of these new requirements.

The government should consider how support could be made available, such as through continuation of previous government funded grant assistance or through rural development measures, to assist dairy farmers in making the necessary capital investment to meet new environmental requirements, especially those arising from the Water Framework Directive.

The government should not resort to economic instruments, such as taxation, in order to achieve compliance.

Why

Government has a responsibility in assisting dairy farmers to adapt to major changes in public policy.

Environmental regulation will result in greater costs and, in particular, some significant capital investment will be needed on many farms across the UK to tackle diffuse water pollution. The international framework in which the industry operates means that the additional costs imposed on the sector by the requirements of environmental regulation may not be recovered from the market place.

Rural Development measures allow funds to be made available for improving the competitiveness of agriculture through farm modernisation.

The government should continue with an educative and informative approach to implementing environmental regulation as the government requires the positive participation of dairy farmers in changing their practices in order to achieve its objectives.

Economic policy instruments, such as environmental taxation, would increase the cost burden on producers, and they cannot be easily tailored to the unique environmental circumstances that prevail in each area.

Rural Development Regulation

Issue

The European Commission has proposed a new Rural Development Regulation to govern the delivery of rural development measures in the period 2007 – 2013. These proposals provide for expenditure under the four broad headings of: improving the competitiveness of agriculture, land management, diversification of the rural economy and community based rural development initiatives.



Delivery of many of these measures will be conditional on the level of funding available to the UK from the EU and the funds made available by deductions from the single farm payment ('modulation' of payments).

Dairy UK Policy

The response of the UK government to the Commission's proposals must take account of the need for a competitive dairy industry. The government should prioritise measures that will help the farming community to become a more robust, market-focused and economically sustainable sector. Value for money must not be judged solely on a narrow definition of the delivery of environmental benefits.

The UK must fight to improve its historic allocation of rural development funds from the EU to reflect the importance of agriculture in land management.

Any government decision to increase the burden of modulation on producers must ensure that UK producers are not put at a competitive disadvantage compared to their EU counterparts. Ideally, changes in the level of modulation should apply uniformly across the EU.

Why

The dairy industry will need to increase its competitiveness in order to sustain milk production and in particular to ensure that new environmental regulation is delivered effectively at farm level.

The UK has received an historically poor allocation of monies from the EU rural development fund. The UK has used the discretion available to it to modulate CAP support payments in order to transfer monies from farmers to rural development measures. To avoid competitive distortions and promote a level playing field, the UK should not seek to increase levels of modulation significantly beyond those that apply throughout the EU.

Finalisation of the new Rural Development Regulation (RDR) may fall under the UK's Presidency of the EU in the second half of 2005. The retention of the UK's rebate may reduce the future availability of EU funds for the RDR.

Climate Change Levy

Issue

The UK objective to reduce emissions of carbon dioxide by 20 per cent on 1990 levels by 2010 goes beyond the legally binding Kyoto target. As one of the means to meeting this target, the government has introduced the Climate Change Levy (CCL), which came into force on 1st April 2001. The aim of this environmental tax is to force business to reduce energy consumption and to encourage the use of renewable energy.

Dairy UK Policy

Dairy UK supports Government aided measures to encourage industry to reduce the industry's energy footprint. However, using economic penalties such as the CCL is an extremely blunt instrument that imposes unnecessary costs on the industry which are incompatible with the wider international market the industry operates in. Consequently Dairy UK believes that the necessity for the CCL should be reviewed.

Why

The industry's challenging commercial environment and low margins means that it has always

had a strong incentive to control input costs, of which energy is one of the most significant. Government support to assist this process is therefore welcome.

Penalising companies for energy usage through the CCL does not meaningfully assist the process of finding energy savings. Significant investment in new plant means that the industry is already operating to a high degree of energy efficiency.

The cost to the industry of the CCL is around £1 million per annum, but this can be greater depending on the industry's energy usage. The administration of the CCL is complex and bureaucratic. The UK's competitors are not subject to similar obligations.

Integrated Pollution, Prevention & Control (IPPC)

Issue

Currently approximately 60 milk processing sites in the UK require an IPPC permit in order to operate. The IPPC permit requires a company to identify and reduce any potential environmental impacts to air, land and water. The cost of applying for a mandatory permit is in the region of £15,000, with an annual fee of approximately £6,000 per site. The permit sets targets and deadlines for each site to meet in order to retain their permit.



Dairy UK Policy

Dairy UK opposes the imposition of uneconomic environmental targets on the industry through IPPC that in many cases will achieve little environmental benefit.

Dairy UK welcomes the move by environment agencies to work more closely with the industry to reduce its environmental impact.

Why

IPPC in its current form imposes a significant financial burden on the industry, both in terms of the regulators on-going fees and compliance costs. These costs undermine the industry's competitiveness and, consequently, its economic sustainability. The policy also creates market distortions by giving a competitive advantage to sites that are not regulated by IPPC (sites processing less than 200 tonnes of milk per day).

The external imposition of an improvement policy by environment agencies will not result in the most appropriate environmental improvements taking place at the right time.

However, the industry is engaged in an ongoing reduction of its environmental footprint and therefore welcomes the move by environment agencies to work more closely with the industry to reduce its environmental impact.

04 HEALTH AND NUTRITION

Nutrition Labelling and Sign-posting

Issue

Milk and dairy products are important sources of protein, calcium and micro-nutrients.

If the government, in its need to combat the poor nutritional value of many fast-foods and ready meals, adopts policies on nutrition labelling and sign-posting which disadvantage milk and dairy products, the result will be consumers moving to less balanced diets, with consequent increases in obesity, blood pressure and other diseases.

Dairy UK Position

Dairy UK advocates the promotion of balanced diets. In particular medical research has shown that if, in addition to fruit and vegetables, three portions of dairy products are included, the results are even more favourable (in terms of blood pressure, cholesterol, weight control, certain cancers, bones and teeth) than fruit and vegetables alone.

Any sign-posting system needs to be a tool towards educating consumers into balanced diets, rather than a means of labelling individual foods. Portion size also needs to be taken into account, since an average portion size of cheese is 30g, and labelling systems based on an intake of 100g are not appropriate.

Why

Milk and dairy products provide a range of nutrients in forms which have a long history of contributing to good health. A balanced diet consisting of five portions of fruit and vegetables with three portions of dairy has been found to be even better than fruit and vegetables alone, and the government in the long term would save in National Health Service costs by promoting dairy as a part of balanced diets.

Welfare Foods Scheme

The issue

Under the Welfare Foods Scheme the government currently spends more than £142 million annually providing liquid milk and baby (formula) milk to low income families with children under five, and milk to children also under five in day-care and nurseries. Just under half of the liquid milk supplied to low income families under the Scheme is delivered via the doorstep delivery service. Northern Ireland has a higher proportion of families receiving welfare benefits than Great Britain.

The Department of Health (DoH) has published 'Healthy Start', its proposals for the reform of the Scheme. The key proposals were that:

- the milk token (currently worth 7 pints of milk or a quantity of formula milk) would be replaced with a fixed value voucher (£2.80) which would be exchangeable for fresh fruit and vegetables as well as milk or formula milk
- the age limit for receipt of milk tokens would be reduced from a child's fifth to fourth birthday
- children in day care or nursery would be offered the choice between milk or a piece of fruit

Dairy UK Policy

As at present, beneficiaries should be entitled to receive 7 pints of milk, regardless of how and from where this milk is supplied.

The benefits under the scheme should continue to be made available up to a child's fifth birthday.

Children in day-care and nurseries should be able to receive both milk and fruit under the Scheme.

Why

Replacing a milk token with a fixed value voucher will encourage abuse of the Scheme, as the vouchers are more likely to be used as "currency" for the purchase of non-healthy items. It will also reduce the incentive to obtain milk through the doorstep delivery service, which would have a significant effect on the viability of the service in certain areas.

The reduction of the age limit to four will significantly reduce the scope of the Scheme.

The greatest possible nutritional benefit would be achieved if children in schools were able to receive both milk and fruit, instead of parents being required to choose between the two.

EU School Milk Subsidy

Issue

There is an EU subsidy for the provision of liquid milk to school children, which the UK government chooses only to make available to pupils in primary and nursery schools.

In supplementing the subsidy from the Welfare Foods Scheme, the EU subsidy allows the provision of free milk at nursery schools.

There is no subsidy for the provision of milk to secondary schools, as the UK has chosen not to utilise this subsidy along with that for cheese.

Dairy UK position

The provision of milk in schools is of considerable importance both for the beneficial nutritional impact on children and for developing tomorrow's consumers of liquid milk.

Dairy UK would like to see the full utilisation of available EU funding to ensure that the UK obtains the maximum benefit from the scheme.

Why

Milk and dairy products can play an extremely important role in the balanced diet of children and, as such, every effort should be put into assisting their provision. Introducing milk and dairy products to children as part of a healthy balanced diet also helps shape the industry's future consumers.

The benefit of the EU subsidy to the UK is reduced by the exclusion of secondary schools and cheese from the scheme.

05 ANIMAL HEALTH ISSUES

Animal Health and Welfare Strategy

Issue

Bovine TB is not a health risk for consumers but the impact on dairy farms is devastating, financially and for the morale of producers. Bovine TB is increasing rapidly in certain parts of the UK and is spreading into areas where it previously was absent.



The spread of bovine TB is costing the government large sums in compensation to farmers where bovine TB is detected, and is threatening the livelihood of many farmers. Exports of UK dairy products are also at risk, since importing countries can source product from countries where bovine TB is absent.

Dairy UK Position

Dairy UK is supportive of DARD's animal health and welfare strategy but a partnership approach also requires the government to take action where necessary. Dairy UK supports the adoption of vigorous measures to reduce, and eventually eliminate, bovine tuberculosis. The Precautionary Principle should be used to promote action where scientific uncertainty exists. Dairy UK would propose the application of this principle to bovine TB. A comprehensive set of control measures is required and this would include tackling the wildlife reservoir of infection and removing badgers in infection hotspots.

Why

DARD's animal health and welfare strategy is a positive step to improving animal health and welfare through a genuine partnership between government and producers. Producers will need to take on additional responsibilities, but the government must also take steps to prevent animal diseases entering the UK and to tackle those diseases already endemic, particularly bovine TB and brucellosis, which have proved a scourge on dairy farmers across the UK.

The current control strategy has failed to address the spread of bovine TB.

The present government policy of awaiting the results of the Krebs trials in the search for incontestable scientific justification for any control measures is leading to paralysis. There exists a sufficient evidential basis for the adoption of more vigorous control measures now. This is supported by the views of significant elements of the veterinary profession.

Other Animal Diseases

Issue

Johne's disease is caused by the bacterium *Mycobacterium avium paratuberculosis* (MAP), which is difficult to destroy. There is no proven link between MAP and human disease but, unless policies for eliminating MAP are adopted, the incidence of Johne's disease will continue to increase, leaving the dairy industry vulnerable.

Dairy UK

Dairy UK advocates that, in addition to the guidance issued by Defra to farmers on controlling Johne's disease, the government should carry out a survey of the UK dairy herd to determine the incidence of Johne's disease. This should be followed up by control measures to reduce, and eventually eliminate, the disease.

Why

The adoption of such a policy would lead to the incidence of Johne's disease being gradually reduced and eventually eliminated. This would improve the health status of the UK dairy herd.

Dairy
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06 INDUSTRY STRATEGY

In order to sustain its profitability the dairy industry will pursue the following strategies:

Product Safety

Through its farm assurance schemes and other mechanisms, the industry will ensure that its products are produced to the highest standards of product safety. The industry will use the Precautionary Principle in dealing with any hazard that may affect the safety of its products.

Animal Welfare

Through its farm assurance scheme and other mechanisms, the industry will also ensure the operation of benchmark standards for the welfare of dairy cows.

Producer Efficiency

Producers will continue to restructure their operations to achieve greater efficiency. For many this means the achievement of greater scale to realise economies of scale. This will result in the creation of larger milk production units.

Seasonality of Production

In order to reduce costs the industry will seek to reduce the profile of aggregate milk production.

Processing Efficiency

Processors will continue to invest in larger, more efficient processing plant in order to achieve economies of scale. This will result in the rationalisation of older, less efficient plant.

Consolidation

Processors will continue to consolidate through mergers and acquisitions in order to achieve greater scale. Greater scale will:

- improve the market position of the industry
- allow greater resources to be accessed to invest in:
 - ◆ new efficient plant
 - ◆ new products and brands

Vertical Integration

Through producer co-operative investment in processing, joint ventures and long term contractual commitments, the industry will seek to achieve closer integration between producers and processors. This will

- reduce the price volatility in the raw milk market
- improve supply chain efficiency
- ensure producers obtain a greater share of value added

Innovation

The industry will invest in the development of new products in order to:

- respond to consumer needs
- increase income to the industry

Integrity

Through the choice of production techniques, the industry will ensure that the consumer's perception of dairy products as wholesome and natural is fully justified.

Labelling

The industry will present its products to consumers with clear and unambiguous information on their compositional content, nutritional value and those processing methods used in their production that are relevant to maintaining product integrity.

Trust and Dialogue

The industry will maintain a continuous dialogue between all elements of the supply chain in order to improve trust and understanding.



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