



UNIVERSITY OF
GLOUCESTERSHIRE

at Cheltenham and Gloucester



The environmental market: social enterprise and the cultural landscape

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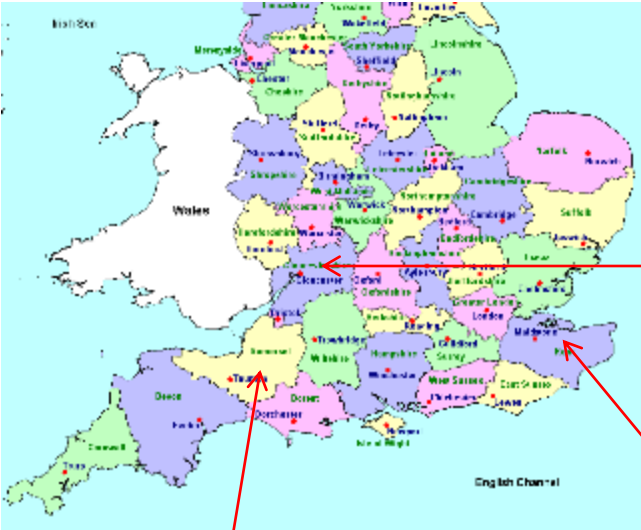
Countryside and Community Research
Institute

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Presentation overview

- Outline the environmental ‘problem’: traditional orchards on the slide
- Present some contexts from the UK
- Share experiences from Germany – are these examples interesting, transferable, next...?

Here are our UK subjects



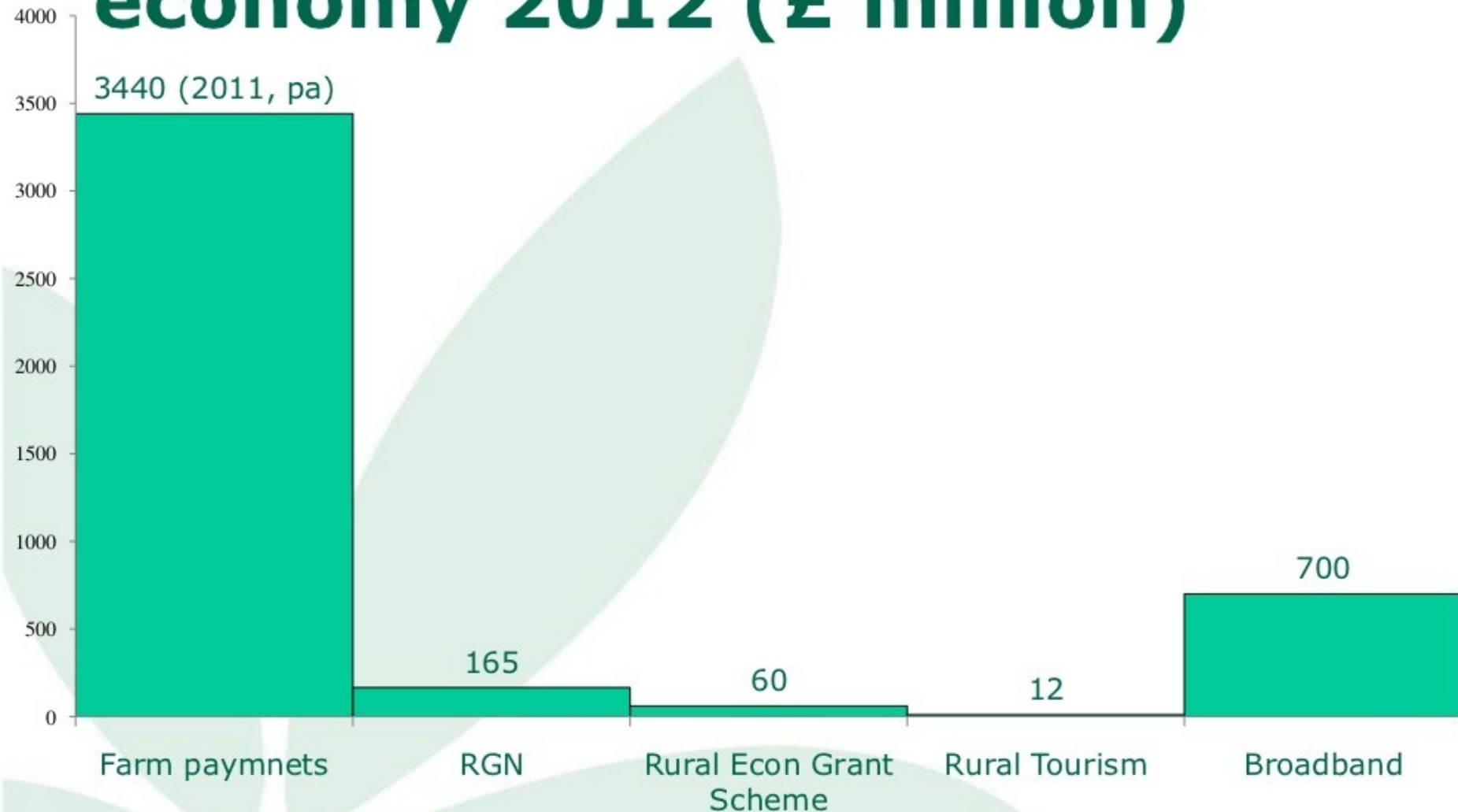
Orchards on the slide?

- 90% reduction in Devon since 1965 (Common Ground 2000); 64% decline in commercial orchards 1970-97 (CSL 1998)
- National Trust: 250,000 hectares, 80% farmed, c.170ha of known orchards (50% in 2 estates)
- PTES Survey 2011: <17,000ha. of traditional orchards in England
- Causes of loss include building, neglect, age, changes in farming, changing rural land use, need for consistency in quality and harvest
- In CZ: from 49,000 (29,000) - 21,000 ha total orchards (Caski et al. 1999, CZSO 2012) shifting and falling in favour of intensive plantations within agri-restructuring.

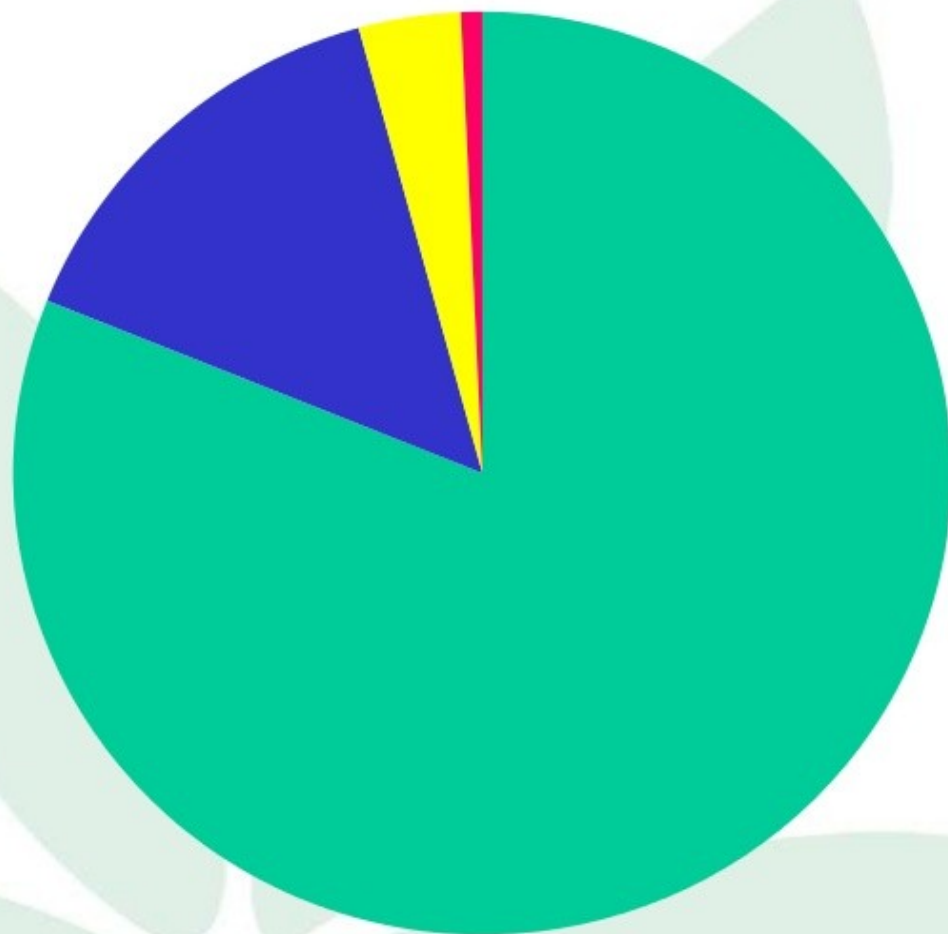
Caski, C., Debatisse, M. and Honisch, O. (1999) *Food and Agriculture in the Czech Republic*. World Bank Technical Paper 437, Washington DC.

http://webcache.googleusercontent.com/search?q=cache:1Yt4vrGR6akJ:https://www.czso.cz/documents/10180/25385875/12876846%2Ba213313_k.doc/51f08212-3362-46c8-ba83-f06e24483b65%3Fversion%3D1.0+%&cd=4&hl=en&ct=clnk&gl=uk

Distribution of public support within the rural economy 2012 (£ million)



Distribution of public support within agriculture 2011



- Single farm payment
- Agri environment
- LFA
- Linked to production

'Public' expenditure

- (i) Orchard agri-envir expenditure £44m pa linked to management – how to incentivise?
(Natural England ES Review 2008)
- (ii) Local/community food project funding £60m since 2008 (from Big Lottery LFF & MLFW).
School and community orchards c.£750k
- (iii) £500k NT/NE *Conserving & Enhancing Orchards, England 2008-11.*

What does this mean?

- The community/voluntary sector is the champion of orchard conservation (cf. Common Ground)
- Many local networks working with private sector partners – Orchards Live, Orchard Link, Northern Fruit Group, GOG,...
- National Trust – HAP programme, RHS network, training and events, PTES – National Survey



SW leads from the front

- Orchards Live – since '91 in North Devon. Training, information, demonstration orchard, mazzard green, leading regional networking
- Orchard Link – since '98 brokering cider production, technical help, equipment sharing
- National Trust initiatives at Killerton, Cothele, Barrington, Parke, Studland...
- Market and knowledge: craft, farmhouse and large-scale cider/perry production: Cornish Orchards, Hecks, Greens, Orchard Pig...



German orchard distribution

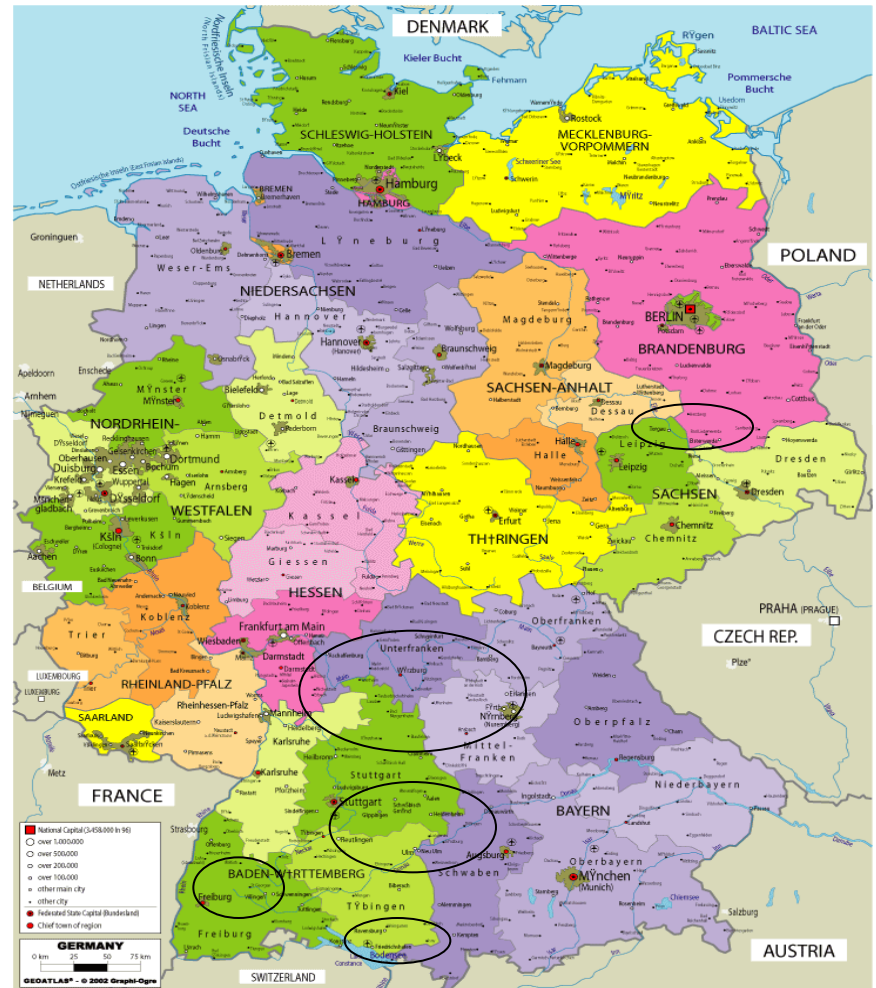
c. 300,000 ha. (England = 16,000ha)

Also losses: 1950 = 1.5m ha.

Bush plantations = 60,000ha.

Main areas Franconia, Hessen, Swabia, Baden, Sachsen-An., Brandenburg

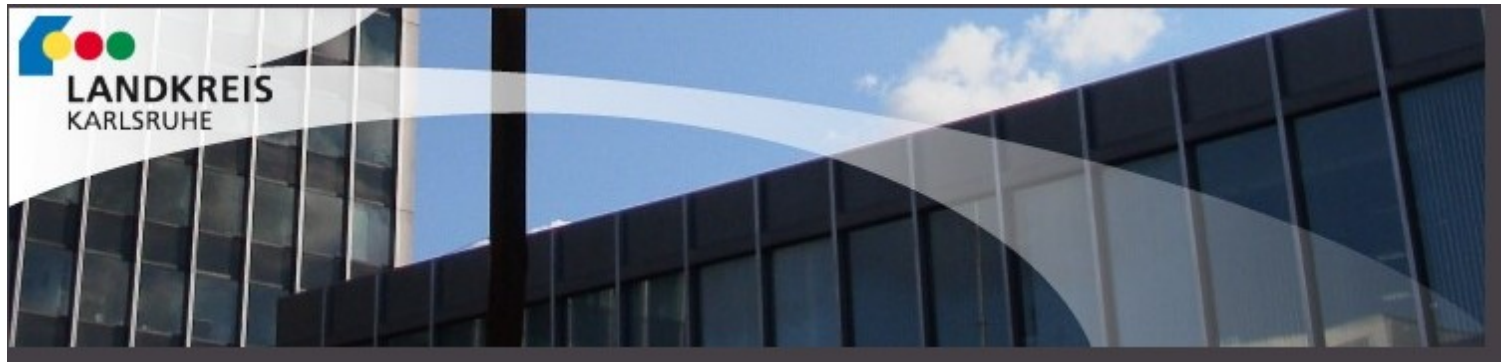
When regarded as agroforest ecosystems, orchards assume huge importance for west and central European biodiversity.



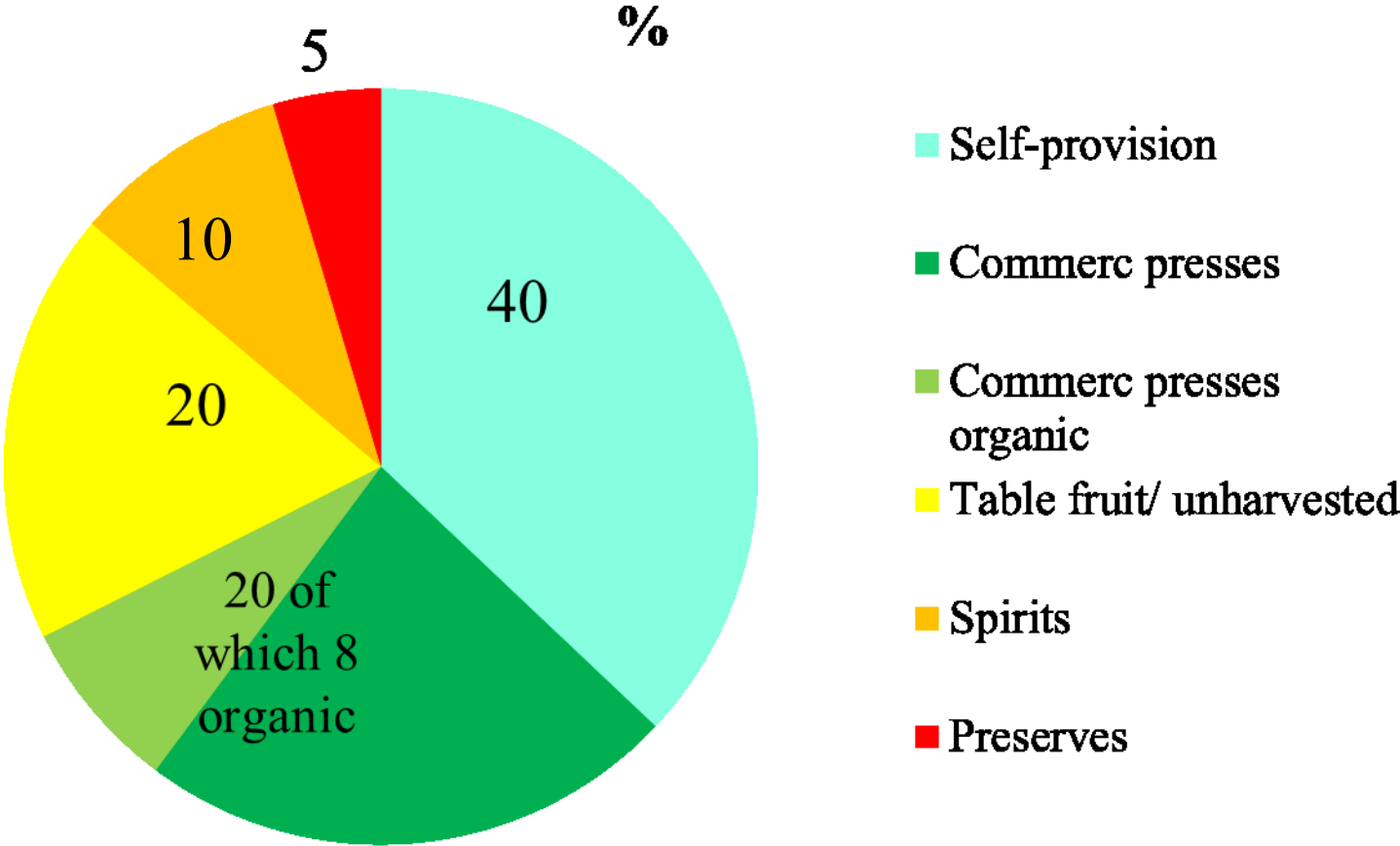
Ownership profile

Total in BW 116k ha (40% German total):

- 60k ha private citizens
- 30k ha agri-enterprise
- 26k ha parishes (11% BW or 65k acres)



Traditional orchard fruit use BW



Neuffen: peri-urban agri?



National orchard ecologies?

- UK Traditional orchard BAP: Key species are noble chafer, mistletoe marble moth, mistletoe weevil. **Scientific**

Pic: PTES



- Germany: correlation between loss of orchards and characteristic birds and flowering plants. **Accessible**

Pic: BLfV



Conservationists say:

- ‘...it’s based on invertebrate interest. ...people get confused with the BAP and think it’s to do with genetic conservation or the cultural side. ...the orchard trees aren’t native, it’s what’s found on them – fungi and the lichens and the invertebrates.’
- ‘...I don’t really need to do a biological survey to verify that a traditional orchard contains twice as many species as a meadow without trees. It’s probably 10 times that, or 100 times. We know that...’

Story so far

- Orchards are cultural landscapes in both UK and Germany
- They are disappearing fast because the ways in which they are valued (ecologically, economically, socially, gastronomically, agriculturally...) are changing – ageing.
- The voluntary sector, and especially local orchard associations, are leading the fight to reconfigure orchard values. Is it enough?

Bavarian Streuobstwiese



Picture: Buechele/Dagenbeck

Encouragement
from Germany?

Orchard social
enterprises in
Bavaria and Baden-
Wuerttemberg.

What's the problem?

- These orchards may cost more to husband than they earn – less than England.
- Payment to farmer supplying commercial press delayed until juice sells (cash-flow).
- Result: little incentive to manage orchards, which are neglected or grubbed out – ie. rich habitat is lost, biodiversity suffers. Economic and environmental logic clashes.

How to compare ENG-D?

Similarities

Orchards are declining for similar reasons

EU-funded agri-env schemes available

Traditional orchards don't pay but cost to maintain

Fruit is pressed

Differences

116,000ha just in BW

120 commercial presses in BW

Germans 3rd biggest apple juice drinkers

Delegated governance

Wildlife vs. heritage/horticulture

Supplier premium schemes

- Environmental org sets up soc ent p'ship
- Farmer is paid x2-3 market rate, on delivery under contract
- Host env org helps with management
- Marketing through old and new channels
- Large supply premium balanced against small retail premium



What's social enterprise?

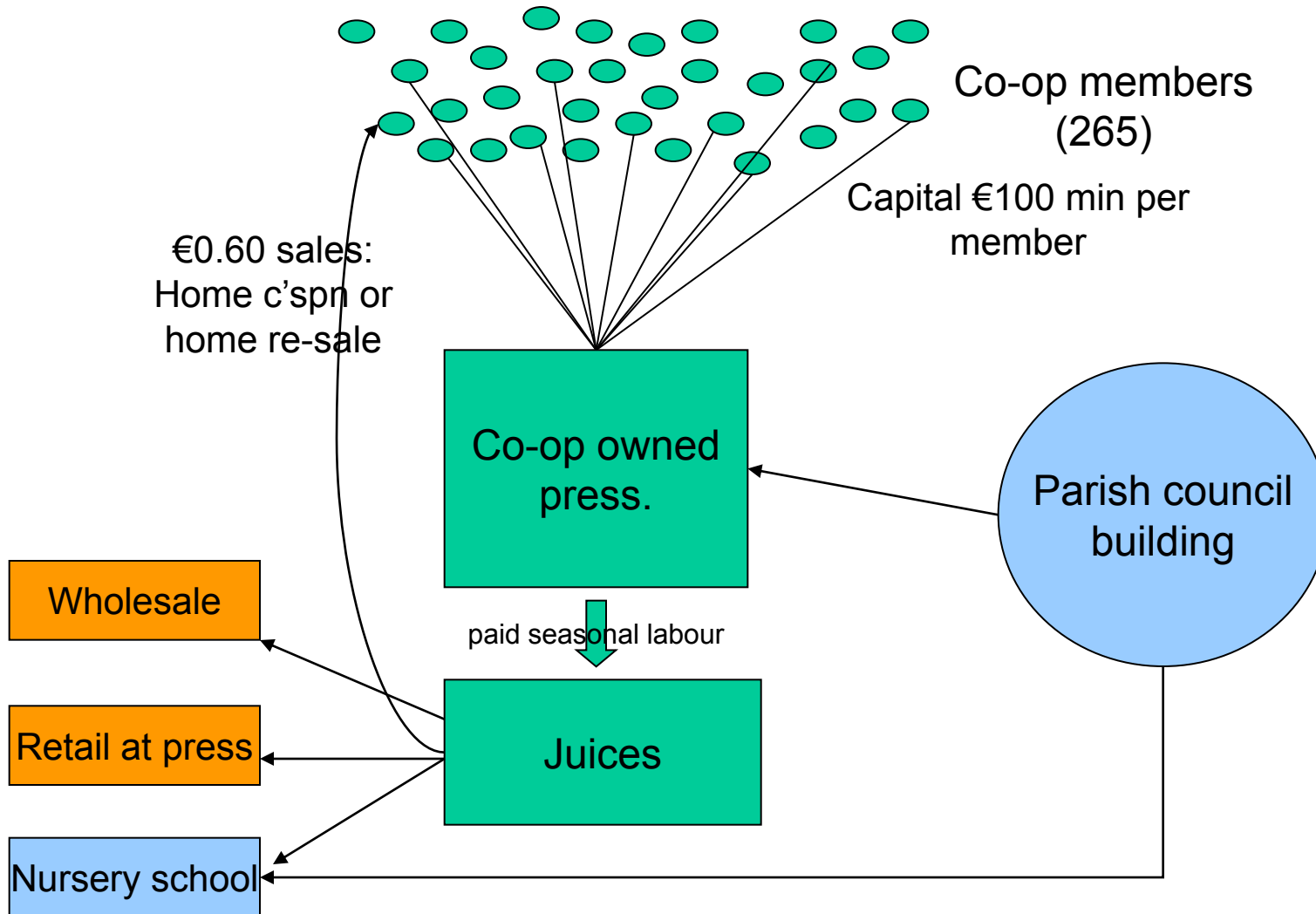
- A business which juggles commercial, social (and environmental) goals
- Profit-making
- Profits used to finance the 'mission'
- Which in our story is the conservation of orchards/biodiversity

Three German SE models designed to save orchards

1. Reciprocal – producer co-op
2. Networked market – SE realigns market relationships to stimulate sales
3. Market-building – SE acts just like a company and competes

All have different risks, results, costs.

1. Reciprocal model



Producer co-op

Press owned by co-op

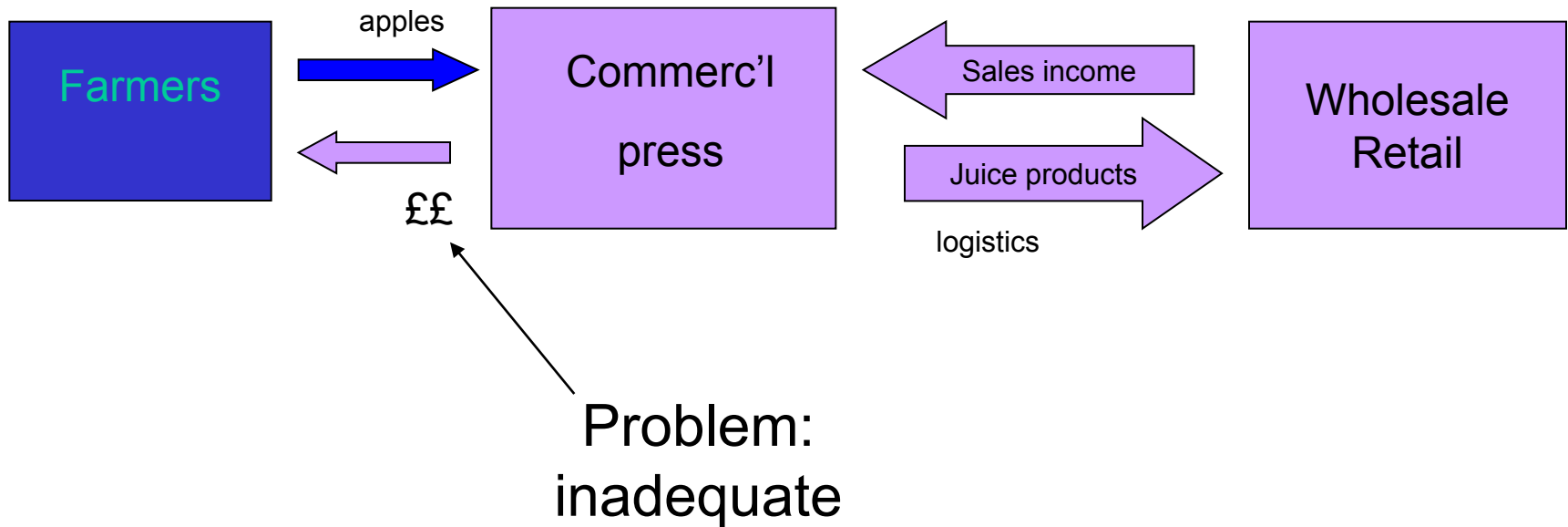
Seasonal, paid operators, in this case local mothers.

Retail outlet and info-centre sells own products in 3/5/10 litre bag-in box.

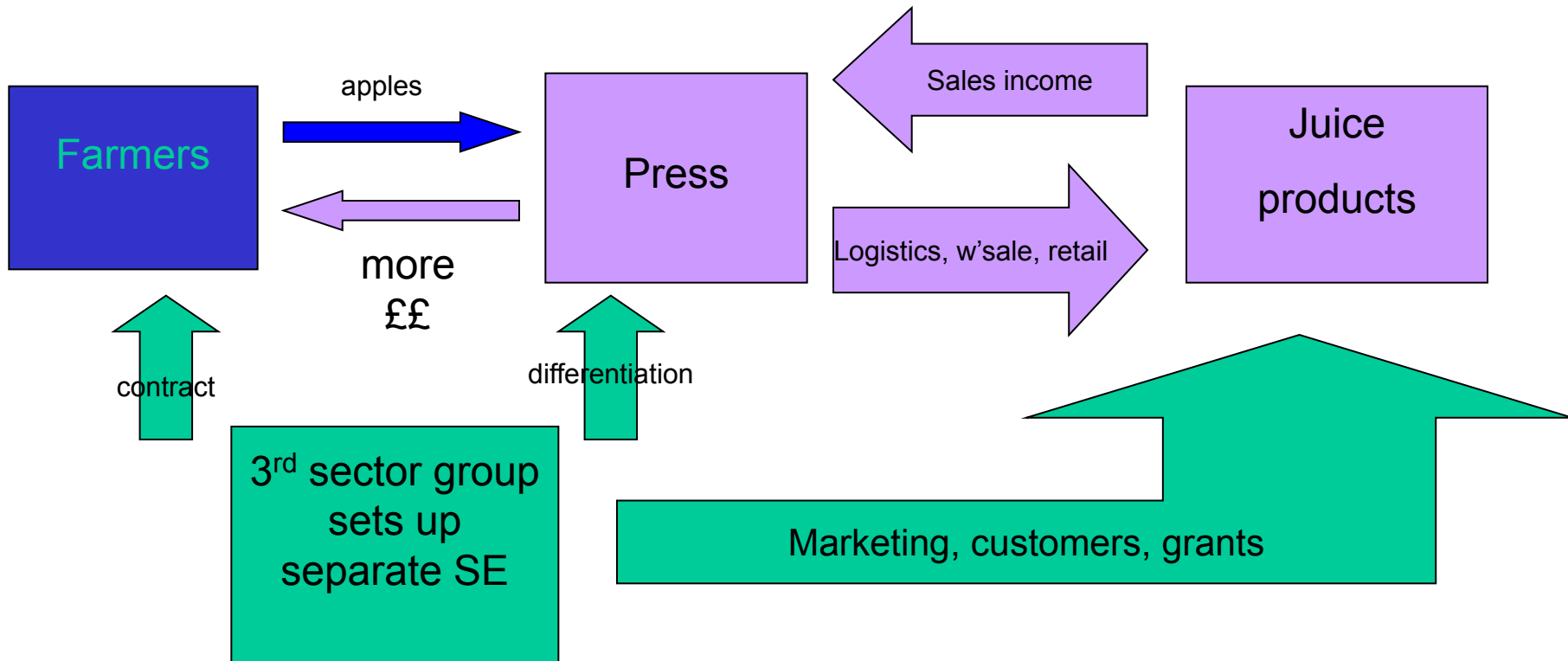
Sell bottled juice, honey and spirits from other groups.



2a. Network market - before



2b. Network market – after



Child labour?

Special needs primary
school buy/sell juice.
Parents & corner shop

Helps with maths

Profits: school trips

Lots of other class work
and field work

Pic: AV



Farmers deliver to press

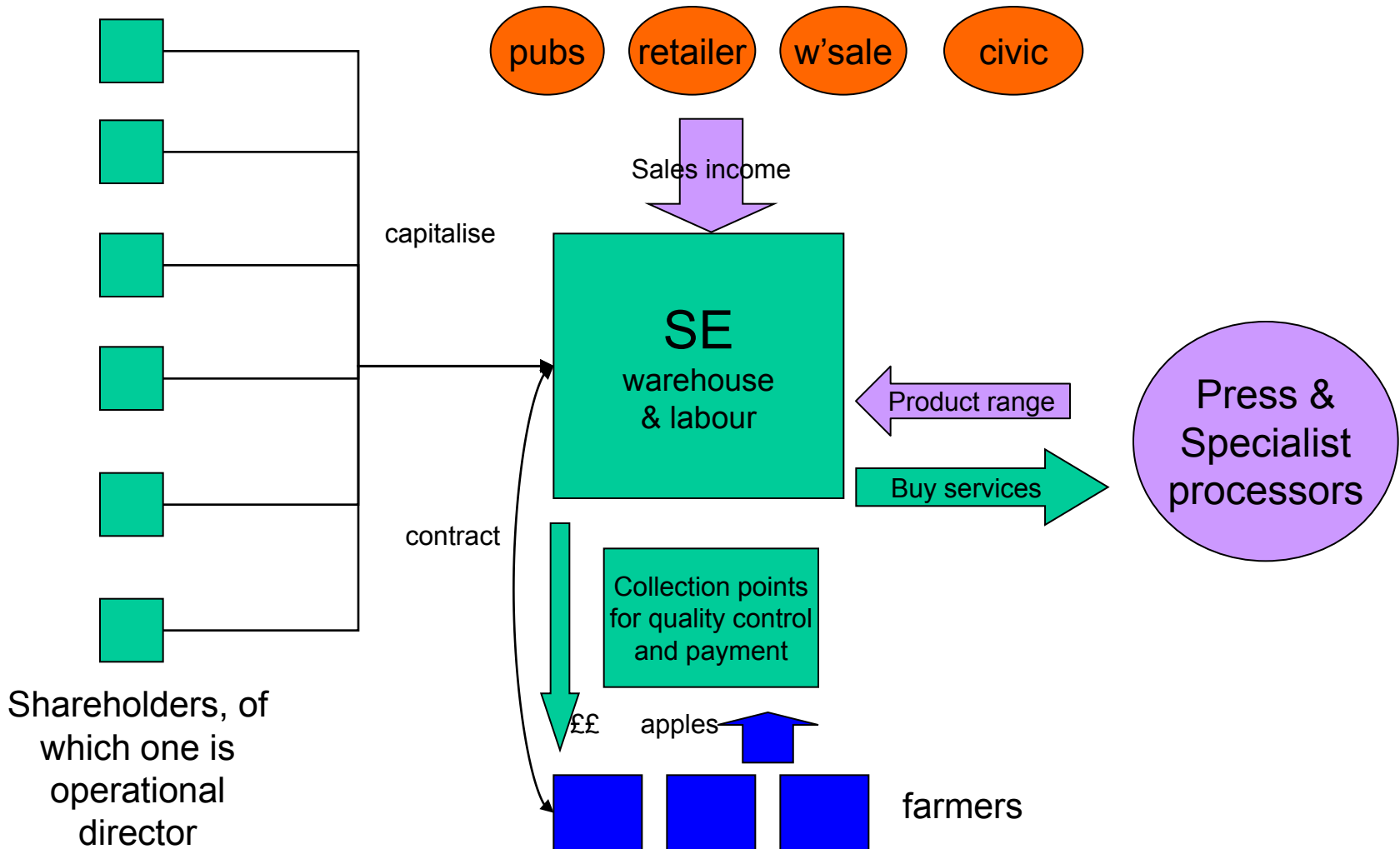
Deliveries by member farmers organised to keep fruit separate. This qualifies it.

Marketing remains with commercial players – press, wholesale, retail, catering trades.

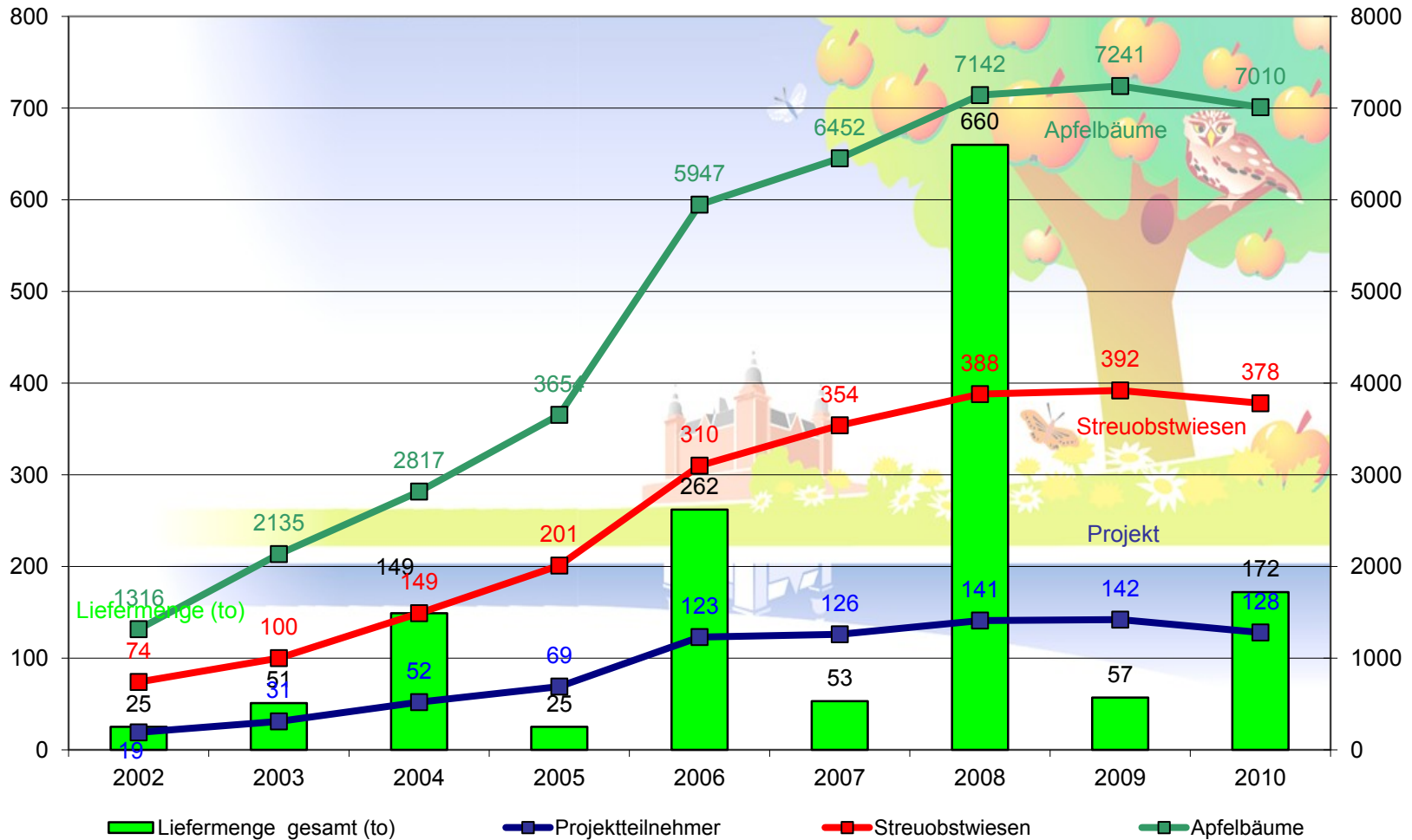


Pic: AV

3. Market building model



Numbers...



The state



1. **Parishes** – orchard owners and beneficiaries of the premiums; client; offer ‘spaces’
2. **Municipalities** - pump-priming grants for S(M)Es; local food promotion; client; market authority; partners in landscape (AONB) progs
3. **Provinces** – channel EU agri-envir payments into grants tied to the revival (pruning, replanting) of old orchards, organic certification, local produce marketing – farmers and presses.

Some summary points

Model	Output (litres)	Some key points
Reciprocal	30,000 – 70,000	<ul style="list-style-type: none"> • Development of new co-operative infrastructure • Overlap between consumers, producers, stakeholders • Economic value of juice is multiple – w/sale, home-retail, public procurement, self-provisioning • Environmental gain unclear
Network	15,000 – 600,000	<ul style="list-style-type: none"> • Stimulation/negotiation of existing market relations • Mobilisation of supporters to create demand • Increased sales create higher supply price • NGO link helps create civic support • Expansion of commercial <u>organic</u> production
Market-building	40,000 – 80,000	<ul style="list-style-type: none"> • Co-option of competitors • Differentiation on basis of product range and fruit variety, client base and price ranges • High level of market research • Good retention of <u>traditional orchard</u> management

Can it work outside Germany?

Local achievements impressive; transferable /comparable?

Public on side?: Apple Day, juice/cider consumption up – health, env, local, cultural, taste... cost???

Other products? – Energy, meat?

Too specific to German contexts?



Pic: A. Vorbeck

How d'ya like them apples?



Photo: Common Ground