

International Nuffield News

October 2010



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“Nuffield and Noble have much in common”

Peter Nixon, International Chairman
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In early September, Jim Geltch and I returned to the US to build on the relationships established earlier this year during the Contemporary Scholars Conference in Washington DC and Pennsylvania.

We met again with Russell Redding, Secretary of Agriculture for Pennsylvania, exploring further opportunities for co-operation. Along with a group

of six scholars - travelling on one of the three Global Focus Programmes this year - we also visited The Noble Foundation, situated at Ardmore in Oklahoma.

An innovator and philanthropist

The Noble Foundation was established in 1945, two years prior to the Nuffield Scholarship scheme and, as with Nuffield, by an equally great innovator and philanthropist.

Lloyd Noble entered the oil business as a young man. Specialising in drilling, his incredible success was due to his ability to access new technology that enabled him to drill faster and deeper than his contemporaries. To access his expanding enterprises, scattered across the US and Canada, Noble embraced aviation. It was from this vantage point that he could witness first hand the poor farming practices taking place below and their impact on the land. Such practices resulted in the dust bowl of the 1930s, and the terrible human and environmental cost that it entailed.

Noble was deeply troubled by what he was seeing as he flew over; not only the human cost, but also the fact that the farmland being degraded would be producing, and be depended on, long after the oil beneath was all gone.

What set this man apart was that he dedicated a large part of his fortune to the advancement of agricultural research and extension - with farmers within a 100 mile radius of the Ardmore facility receiving a free service from this world class facility.

■ Departed Scholars

It is with great sadness that we announce the death of **MAX PIGGOTT - Aus NSch 1955.**



Lloyd Noble, founder of The Samuel Roberts Noble Foundation

The Samuel Robert Noble Foundation is a great example of philanthropy at its best and, like Nuffield Farming Scholarships, their founders vision and generosity has left a lasting impact on the industry and people whom they sought to serve.

This quote from Lloyd Noble in 1948, I am sure, captures a view shared by both our organisations:

“As I look around at the strides that have been made in our research laboratories, as I look at the things undreamed of a few years ago... the only degree to which we have reached the end of the road of opportunity is the degree to which we have exhausted the imaginative capacity of the human mind.”

Nuffield and Noble have much in common and, although different in approach, they compliment each other in seeking to advance agriculture in the modern world.

Scholars should go out of their way to visit this outstanding facility. Along with our friends in Pennsylvania, there is an open invitation to visit.

Go to www.noble.org to find out more.



Peter Nixon and Jim Geltch with Secretary Russell Redding (Centre) on the CSC 2010

UK CONFERENCE

4th-6th November 2010
Roxburghe Hotel, Edinburgh

Scholars and their guests can look forward to a truly memorable Scottish experience at the 2010 Annual Conference. If scholars from other parts of the globe find themselves in the UK in November and want to join us, we would be delighted to see you.

Jack Ward, NFST Chairman

Nuffield Calendar

Date	Event	Venue	Host
5-6 November 2010	Nuffield Conference	Edinburgh	Nuffield UK
27 Feb - 5 March 2011	CSC	Auckland, New Zealand	Nuffield International
24 - 27 March 2011	Autumn Tour	Launceston	Nuffield Australia
25 Sept - 8 Oct 2011	International Conference	Adelaide and Perth, Australia	Nuffield Australia

For further information, please visit www.nuffieldinternational.org

GLOBAL FOCUS

All packed and raring to go in early September, six Scholars on the third Global Focus Program in 2010 kick started their journey in the USA, but went on to include countries as far flung as Bahrain, Syria, Ukraine and India. The following reports give a flavour of what they learned and the cultures they experienced in these incredibly diverse countries.

SCHOLAR GROUP: Bill O'Keeffe, Steve Newman, Chris Ferguson, Minh Hieu Ly, Don Madden and Ian Duthie

USA - Oklahoma and Washington

Understanding the US Farm Bill is crucial to understanding US agriculture. The Farm Bill is negotiated through a committee process headed by political appointees whose decisions can be influenced by a strong contingent of lobbyists who operate on many levels.

The US has the capacity to increase its food production in nearly all commodity sectors. Access to water is vital for agriculture in the US - and globally - and lack of water can be to the determinant of the country's economic potential.

To compete with the US, other countries need to understand where their sectors have a natural competitive advantage and focus on specialisation and economies of scale.

US ethanol policy will continue to distort global commodity markets in the future in three ways: 1) The success of second generation product (eg. Switch Grass) and its overall effectiveness on a commercial scale; 2) Subsidies paid to ethanol manufacturers (45c/litre) and a mandate of 15% of fuel to contain ethanol; 3) Trade tariffs distorting imports from Brazil of sugar cane derived ethanol.

Strengths

- The size and strength of the US domestic market has enabled the development of a robust production system that can compete with global markets across a broad range of commodities.
- At a government level, agriculture appears to be punching above its weight.
- Funding and facilities available for agricultural research are plentiful and well established.

Weaknesses

- US farmers are subsidised through direct payments and crop insurance.
- Unsustainable farming practises are impacting on the environment.
- Farm Bill policy centred on social welfare food stamps and school nutrition programmes distorts overall function, purpose and public perception of agricultural funding.
- Public appreciation for agriculture is disadvantaged by the fact that average daily meals are highly processed and far removed from their natural state.
- Lobby groups are not necessarily focused on good agriculture and public policy.

Opportunities

- The USA has 300+ million immediate consumers, resulting in an export market being a bonus, rather than a necessity.
- There is huge potential to increase agricultural output and food supply.
- The USA agricultural sector enjoys low labour costs and vast agricultural resources.

Threats

- Only 0.5% of the population are directly involved in agriculture.
- Farming practices are regulated, yet regulation is not necessarily conducive to innovation.
- EPA and environmental legislation is strengthening.



Highlights

- Farming population is aging, with the average farmer aged 58.
- Power of the animal rights movement is increasing.
- Disproportionate focus of research on energy creation, rather than food production (ramping up wheat production for ethanol).

- Successful vertical integration on massive scale.
- Noble Foundation ideology.
- Gaining an understanding of global agriculture.

The overall highlight of the US experience was the conversation and discussion amongst the group following a visit or meeting. Our understanding grew with the interaction between members of the group as we shared strategic industry knowledge and developed an appreciation of each other's point of view - *and taste in beer*.

We all agreed on a quick-as-possible exit from the USA, as we watched another US \$100 bill melt in a wad of cheese. Two days later we found ourselves eating croissants, grading steeples and singing Johnny Cash as we road tripped across the South of France. Ooooh La La....

FRANCE - Amiens, Gaujacq, Chartres and Paris

France is all about appreciating beauty and style. In all aspects of life, food is an essential part of that appreciation and the flow-on affect is a healthy respect for agriculture. That culinary appreciation links the general population to agriculture in a way that is not evident in the USA.

Advanced methods of farming, but not genetic modification, are used to increase yields. Land is not freely available for expansion and this leads to the misconception that agriculture is not 'growth driven'.

French agriculture is heavily based on EU policy decisions. As history is a driver of EU policy, starvation and multiple wars have given these countries a different perspective on farming and food supply chains. To this day, some farmers are still finding mortar shells in their paddocks as a stark reminder of the legacy of war.

EU trade policy decisions are made on emotion, rather than science; an indication of a continent with an oversupply of food.

The debate over such things as GM products and growth promoters fuels a trade barrier between countries with a vested interest in commodity goods.

We believe this policy decision making is not conducive to future trade. If EU trade restrictions on food from certain production systems in the US are applied on emotional grounds instead of science based decisions, what defense will Europe have if the US, for example, bans Mercedes Benz on a similar decision making process?

EU governments are subsidising farmers by direct payments. These are outcome-based subsidies to force farmers to align themselves with EU policy. Some of these are conditional on such things as animal welfare (livestock movement on trucks, animal passports), environment (keeping hedges around land) and food safety (full traceability eg. Eurogap).

These direct payments are aimed at keeping people in regional areas and are a 'form of social welfare'. They should be viewed for what they are and



not taken in the context of 'agriculture', so not to distort the public's perception.

Strengths

- Farmers spread their risk by specialising in a selection of high value crops and producing them as efficiently as possible.
- Strong rural communities allow efficiencies through co-operation to offset their lack of efficiency of scale due to limited land holding size.
- Contentment was evident in all the farmers we visited with. They seemed to have a deep appreciation of their environment and take pride in their occupation.

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- Rural areas have been sustained with direct payments. Most of the land was in production.
- Agriculture appeared to be a stable and safe industry in France.
- The central market system of Rangji brought all kinds of produce into the centre of Paris and enabled ease of access to the retail market on a substantial economy of scale.

Weaknesses

- We noticed a lack of large scale operations - which could lead to inefficiencies. However, this seemed to be addressed through co-operation between farming communities and within families.
- Most farms seemed to have a large investment in specialised plant and machinery relative to the size of their operations. A reluctance to adopt certain new technologies, such as GM, will continue to erode their competitiveness with overseas producers.
- Difficulty for young farmers to enter the market reduces the dynamics of the farming population. The structure of farm ownership - based on long held family inheritance and leasing arrangements - has created an entry barrier to new industry participants.
- As more countries join the EU, it is inevitable that direct payments will be reduced. How France reacts will determine the viability of their agricultural sector going forward.

Opportunities

- The potential for farmers to capitalise on the affluent sector's appreciation of food and its origin.

- More productivity from available resources through the adoption of modern farming technological advances.

Threats

- Subsidies have the potential to breed complacency in production as well as the market place, reducing the appetite for risk and growth.
- Stagnation of general economic growth will affect the population's ability to subsidise producers.

Highlights

- The cultural experience that is France.
- Witnessing contentment in everyday life, seemingly driven by a lack of pressure that is such a large part of farming in Australia.

A highlight of the trip was French hospitality. We were welcomed into stranger's homes and even managed to find a Scholar's long lost cousin in the Paris market place - where an upturned rubbish bin was used as a picnic table as we sheltered from the rain under a shop awning, swigging on French wine, and eating cheese and bread. Ahhhh, sweet Paris. A few days later we were in shock, as we swapped the genteel French culture for the raw post-Soviet regime of the Ukraine. Vive Le France!!!

UKRAINE - Kiev to Odessa

The Ukraine is symptomatic of most post communist block countries struggling to come to terms with a global economy that has developed from the massive advances of the industrial revolution in the last half of the 20th century.

It is a country blessed with the most abundant agricultural resources, but still struggling to gain confidence after three generations of citizens ruled by a central authority, then intimidated by a post soviet age of corruption.

We must take our view of Ukraine from a point of relativity and not judge it too harshly, or else we may further damage the potential of this powerhouse of agriculture. Relationships in agribusiness must be mutually beneficial, not only to achieve outcomes in growth and development, but also social change in the rural areas.

Total agricultural land is approximately 41 million hectares of fertile soil. After the collapse of communism collective farming, lands were divided up between the farmers and currently no freehold to land ownership is possible. Rents can be paid for with grain from the harvest or with cash.

Ukrainian agribusiness has a unique set of circumstances that need to be appreciated by prospective farmers. Sound local knowledge and community respect are vital for business success.

Strengths

- Land is ideally suited to cropping with large amounts of arable land available.
- Fertile soils, varying in type and depth across the country, enable a large range of crops to be grown. Typically soils are Chemozem black earths with 2-3.5% humus levels and up to 2.0m deep.
- Reliable seasonal rainfall, with areas of spring melt, help maintain good moisture profiles.
- Average minimum wage of US\$100 a month reduces labour inputs in agribusinesses.
- High rates of return are achieved (50%+). However, these are eroded by high inflation and interest rates.
- No income tax system, but VAT of 20% on all sales.
- A massive amount of surface water is available for irrigation, with some infrastructure developed.

- Land leasing arrangements facilitate less capital invested in land-based assets freeing up capital resources for production outcomes.
- Inland river systems facilitate economic movement of produce through the nation and to major international ports.

Weaknesses

- Deteriorating overland transport infrastructure.
- Economic insecurities, resulting in a devaluation of the Ukrainian currency of 60% in the last year. Interest rates are currently 22% and inflation is now 17%.
- Government interference in the market place distorting prices and free trade. Exports of wheat have been reduced by 75%, with no reliable explanations given.
- Input supply chains appear to be unreliable.
- Labour skill set is developing, but variable.
- Socialist indoctrination has resulted in a risk averse population. Flow on affect of this is a workforce that is hesitant to take responsibility.
- A shortage of effective middle management in agricultural sectors results in a reliance on expatriate managers.
- Lack of a livestock industry reduces agricultural diversification and increases risk. Yet cheap grain is available.

Opportunities

- Freehold land ownership may be possible in future.
- Foreign investment to stimulate the development of the agricultural resources and take advantage of its low currency exchange.
- Development of massive irrigation systems around the country's vast water resources and existing water infrastructure.
- Value adding to agricultural commodities, utilising a cheap (but compliant) labour force and strong commodity supply.



- Generational change to bring vitality to agricultural modernisation and business growth.
- Massive increase in production through improving yields, adoption of modern farming practices, machinery and professional business models.

Threats

- Foreign investment and business relationships can be hampered by mistrust.
- Limitations in the growth of the middle-class-lead domestic economy that could boost the country's GDP and standard of living.
- Non-alignment with a trading block will continue to leave Ukraine trade exposed.

Highlights

- Observing the enormous potential that such fertile soils and abundant water bring to a nation.
- Experiencing the culture of a country emerging from communism.
- Witnessing a business growing with good ethics in a difficult social environment.

When we arrived in the Ukraine we were like 'kids in a lolly shop', excited by the country's incredible soil and water resources which have such enormous potential. As the week went by, we came to understand that Ukraine agriculture was extremely complex and challenging, much more than the simple application of science and economics to reap the benefits of its resources.

Around the globe



Australia

Nuffield Australia has recently completed selections for 2011. This important process has seen 18 scholarships awarded of a possible 22.

At Nuffield Australia we believe that, whilst growth in scholar numbers is part of our long-term strategy, it is critical that we keep the standard of scholars selected at the same level we have for the previous 60 years. Details of scholarship winners will be released in October at our annual Spring Tour, this year to be held in Victoria.

Global Focus 3

September marked the departure time for 'Global Focus Program 3', which went to the US, France, Bahrain, Syria, Ukraine, and India. This was a fantastic trip and we are pleased to mention that we had Bill O'Keefe joining the program from Ireland.

Nuffield Australia repeated its offer to all participating countries that positions are available every year on the Global Focus programs.

I have used the following quote from Australia's Bruce Watson before, but I really think it demonstrates the importance of the Global Focus Program:

DAVE BROWNHILL, Chairman
gowrieoffice@bigpond.com

"Anyway, thanks again for organising (or through your networks) such a great trip. The experience and the friends I have made through the GFP and the Nuffield Association have been one of the highlights of my life thus far."

I would like to add that Bruce has recently delivered a presentation at the National Farmers Conference in Melbourne. The feedback we have received from delegates at the conference was excellent.

Platforms and promotion

Part of our promotional strategy at Nuffield Australia is acting as the conduit to getting our scholars to present at these conferences. Given the opportunity, the scholars do an outstanding job and thus, in turn, industry, our investors and policy makers get to see the benefits first-hand.

I would also like to congratulate the Chia Company and John Foss, Nuffield Scholar based in Northern Western Australia, on their achievement as part of the 'Food Industry Association Toast to Excellence in WA's F&B Industry'. The Chia Company was awarded 'Best Retail Product Award' for their

new Health Product Range bringing chia's benefits to Australian consumers.

We also had a number of scholars in the Kondinin Farmer of the Year Awards which were judged in October. Ross Woodhouse (1999 Nuffield Scholar from WA) was successful in winning the major award as the 2010 Australian Farmer of the Year. Ross, in his acceptance speech, paid tribute to his Nuffield Scholarship as the catalyst to his success. Congratulations and well done Ross.

I am pleased to say that Australia, as a rule, is having a fantastic start to spring - with maybe the exception being parts of Western Australia. Dorethea McKellar's poem - 'I love a sunburnt country' - rings in my ears... "Of droughts and flooding rains".

My last report

Finally, this will be my last report as I complete my term as Chairman of Nuffield Australia in October.

I would just like to thank Nuffield Australia for all the opportunities and experiences that I have been so lucky to partake in. A big thank you to the alumni and the Nuffield Australia Board for your support, but in particular the new scholars, who every year get selected to the program and then transform and continue to excel in ways they would have only dreamed of without the Nuffield Scholarship.



United Kingdom

New technologies to transform UK agriculture

In April, Nuffield UK laid on the bi-annual Nuffield Arden Conference. The inspiration behind this event is the Arden Family who generously donated

a sum of money to perpetuate the pioneering spirit of Frank Arden.

Frank Arden lived and farmed in North Lincolnshire where he combined both vision and courage with a willingness to embrace new technology. With these skills he created a farming business that was regarded as a show piece for progressive agriculture. Breaking new ground and applying new technology were a way of life for Frank and, although not a Nuffield Scholar himself, he is a great inspiration for the UK Nuffield Arden scholars.

The topical theme for the conference and the challenge for the two Arden Scholars was to look at the latest science and technologies from around the globe, and assess its suitability and fit for UK agriculture with the aim of raising the competitiveness of UK Farming Plc.

The Arden Scholars, David Gardiner and Lindsay Hargreaves, took on the challenge of reviewing innovative technologies and examining the latest scientific thinking on plant



Ian Crute, Chief Scientist Agriculture and Horticulture Development Board (AHDB) (centre) pictured with 2009 Arden Scholars, David Gardner and Lindsay Hargreaves.

and animal genetics, functional foods and leading edge engineering.

The conference offers the ideal platform to showcase the outcomes of their studies. It was well attended by Nuffield Scholars and a wide range of key industry figures. It also provided an opportunity to revisit earlier Nuffield studies on related topics, and we were delighted to welcome Nick Ward NSch, Peter Gresty NSch and Mike Tyers NSch to present to the conference.

JACK WARD, Chairman
jack.ward@cityandguilds.com

MBE for John Green

Congratulations go John Green (NSch 1949), one of our oldest and most respected Scholars. John was awarded an 'Order of the British Empire MBE' in the Queen's Birthday Honours for voluntary service to the Helford River Children's Sailing Trust. Founded by John in 1997, the Trust has gone from strength to strength and has allowed thousands of youngsters to learn to row and sail.

Ireland

Nuffield Ireland is growing incrementally year on year, and 2010 has seen five high calibre scholars added to our ranks. In addition to planning their own trips, they hosted fellow scholars on the Global Focus Tour in June which culminated in a very successful conference entitled "Carbon - A cost or opportunity for farming".

Ireland has had a good farming year and there is a renewed optimism that agriculture will be the first industry to lead us out of recession. The bumper harvest and rising grain prices helped to offset losses in the sector over the past number of years.

The discussions on the shape of the Common Agricultural Policy post 2013 has commenced, with individual countries taking positions to safeguard their share of the pot against a backdrop of ever decreasing resources.

Nuffield Ireland held its AGM on 28th September last which saw Thomas Horgan step down as Chairman after four years of good stewardship.

Early November will see the participation of the 2009 scholars in the 2010 Nuffield Conference in Edinburgh, myself included. Late November will see the process of five new scholars for 2011 selected.

Our focus in the short-term is to retain our valued sponsors and to cultivate new ones. In the long-term we will focus on continued participation of previous scholars and to ensure that Nuffield Ireland remains a relevant and vibrant organisation to its members. We also look forward to playing our part in the continued development of Nuffield International.

"I am looking forward to the future development of Nuffield Ireland, both domestically and internationally, over the next year. We have embarked on a process which will see a permanent secretariat been retained and this will be in place before year end."

DEREK MCCABE, Chairman
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New Zealand

The power of nature

As many of you would have heard or read, Canterbury, in the South Island of New Zealand, experienced a severe 7.1 earthquake early in the morning of Saturday, 4th September. To experience this event was a stark reminder of the power of nature.

For those of you who know the area, the epicentre was about 30km south west of Christchurch on an until now unknown fault line across farm land.

The damage that occurred on farms in the area was mainly confined to rotary dairy sheds, grain silos and fences. Irrigation assets have yet to be assessed, but there is concern of major problems. Many farm houses were severely affected and a number are uninhabitable.

Christchurch also bore the brunt of the earthquake with older brick buildings destroyed or so seriously damaged that they need demolition. Areas of the city built on sandy soils suffered liquefaction, causing dwellings to slump or their foundations

to crack. Infrastructure across the city and further a field has been compromised. Other parts of the city received very little damage.



Very lucky!

Miraculously, no one has been killed and to date I know of no Nuffield Scholars who have had serious damage.

Thanks to all of you who have enquired about our wellbeing and safety, both from within New Zealand and outside. We consider ourselves to be very lucky.

The NZ Nuffield Trust is at present in the process of selecting next years scholars and the planning is well underway for the hosting of the Contemporary Scholars Conference in March. We expect the earthquake to have no effect on our plans.

STUART WRIGHT, Chairman
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Canada

The weather in Canada has been a hot topic - or maybe not so hot a topic depending on where one lives.

Farmers in the southern parts of the Prairie provinces have had to contend with excess rain since the early spring. I talked with farmers in Regina, Saskatchewan, who estimated that 20% of the acreage was not planted and another 20% of the crop was damaged during the growing season.

In eastern Canada we have had ideal growing conditions - all crops have either been harvested or are in late stages of maturity.

'Breakout year'

This has been a breakout year for Nuffield Canada. We had 60 individuals apply for scholarships. Prior to this year, the most was seven applications in 2009.

From a shortlist of 12, we have selected three candidates for 2011. Once they have signed and returned their contracts, we will post bios of the successful applicants on our website.

The number of applicants this year suggests that Canadians are beginning to appreciate the importance and value of a Nuffield Scholarship. We have activated a sponsorship committee to seek out enthusiastic sponsors to help us grow the Canadian program.



Global Focus Program

Special thanks go to Steve Larocque for his commitment to the Global Focus tour which visited Western Canada in late June. A successful week and a job well done.

Scholars especially appreciated the opportunity to stay on host farms. Many of us who live in other parts of Canada were able to host travelling scholars as well. This is a valuable component of the Nuffield experience.

Nuffield Canada's annual meeting will be held in Victoria, British Columbia, on November 27th and 28th. We invite any scholars travelling at that time in western Canada or USA to join us.

Hall of Fame for Jim

Congratulations to Jim Halford, Nuffield Scholar 1975, on his induction to the Saskatchewan Agricultural Hall of Fame on August 3rd. Jim is well known for his zero-till practices and his innovation in equipment design.

BARRY CUDMORE, Chairman
barrycudmore@pei.sympatico.ca



"The highlight for our family this summer has been the marriage of our daughter, Heather, to Lou Riccoboni. The ceremony took place in our back yard on a beautiful sunny day."

2010 GDF Congress

At the CSC in March, scholars were joined by Bram Prins and Alfons Beldman of Global Dairy Farmers (GDF). Recognising the benefits of an association with the Nuffield group, a bursary was generously offered to attending scholars with an interest in dairy which would enable them to attend the 2010 GDF Congress - traveling to Holland, Poland, Romania and Hungary in September. UK scholar, CHRIS FALCONER, was the worthy winner of the bursary.



"During the trip we had a good mix of visits to farms, in-house presentations and workshops," Chris reports. "We got to engage with people investing in new territories and hear first-hand what the challenges have been, how they are being addressed and the opportunities on the horizon."

"The current state and the outlooks on both macro and micro dairy issues highlighted how much has changed in the last few years. If I had the ability to generate a word cloud, then I'm guessing that 'volatility' would be largest and boldest. Making predictions has become simultaneously more difficult and easier with broader ranges covering for uncertainty."

"Most of the raw data we were presented with is familiar to all of you, but the perspectives of people from the regions in question added significantly to my understanding of what we should take from it. Data means little without insight and, with globalisation a reality, it has never been more important to get out there and speak to people."

GDF (www.globaldairyfarmers.com) provide a platform for dairy farmers focusing on innovations and new strategies. They are supported by farmer members and selected partners from the commercial sector. It is a network which aims to:

- Discuss the impact of policy measures from different organisations - such as the WTO, EU and FAO and the impact on their own businesses.
- Exchange ideas and strategies between entrepreneurs and policy makers world wide on different levels (farm, region, world).
- Act as a forum for discussing problems and their solutions within the network.



Pictures supplied courtesy of Elise Keurentjes, Manager GDF.

Stay in touch!

www.nuffieldinternational.org

It is our aim that the Nuffield international website will become the international link for all Scholars - providing easy access to Scholar reports, forthcoming national events and conferences, links to relevant websites and news. Please take a look. Your comments and suggestions would be most welcome.

PETER NIXON, International Chairman (peter@nixonfarming.com.au)

Contributions welcome...

If you have news to report or success stories to share, please let us know! Send full details to:

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