

Northern Farming Conference 2026

Turning a Corner:

Building the Future of Farming

NORTHERN FARMING CONFERENCE

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Please click on the QR code here to view all of our guest speaker biographies

Mart WiFi: B-2K53NF

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Welcome

Samantha Charlton

Organising Committee Chair

Owner and Founder,

Planning for Profit





NORTHERN FARMING CONFERENCE

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Speaker Session

Chaired By:

Adam Bedford

GSC Grays, Commercial Director



Gavin Lane

CLA President



Tom Bradshaw

NFU President



George Dunn

Tenant Farmers Association

CEO



Tenant Farmers Association

Turning a Corner: Building the Future of Farming

George Dunn
TFA Chief Executive

Tenant Farmers Association

Why the let sector is vital in turning the corner for British farming

- Ownership v Entrepreneurship
- Liquidity
- New entrants
- Progression
- Opportunity cost of land/return on capital

Tenant Farmers Association

What's holding back the let sector from turning the corner

- Lack of security for productivity and natural capital
- Disenfranchisement
- Dislocation
- The role of agents & "market" rents
- Conduct

Turning the corner on security of tenure: background statistics

Tenancies cover around one third of the agricultural Area in England (20% in Scotland)

Area of farmland under tenancies in England 2025 (million hectares)*	
AHA	1.1
FBT	1.3

Stable in total over that last 40 years in England (not in Scotland)

More than half the area let under FBTs

Average Length of Term on Farm Business Tenancies 2025 (years)**	
All FBTs	3.38
Bare Land Only	3.03
Land and Buildings	4.65
Land, House and Buildings	8.73

87% of FBTs are let for 5 years or less**

Sources:
* DEFRA
** CAAV

Tenant Farmers Association

Turning the corner on security through taxation

Reward landlords letting long term through APR

Income tax (Republic of Ireland)

Capital taxation lock

Tax avoidance

Changes to CGT Business Assists Rollover Relief

Reform SDLT

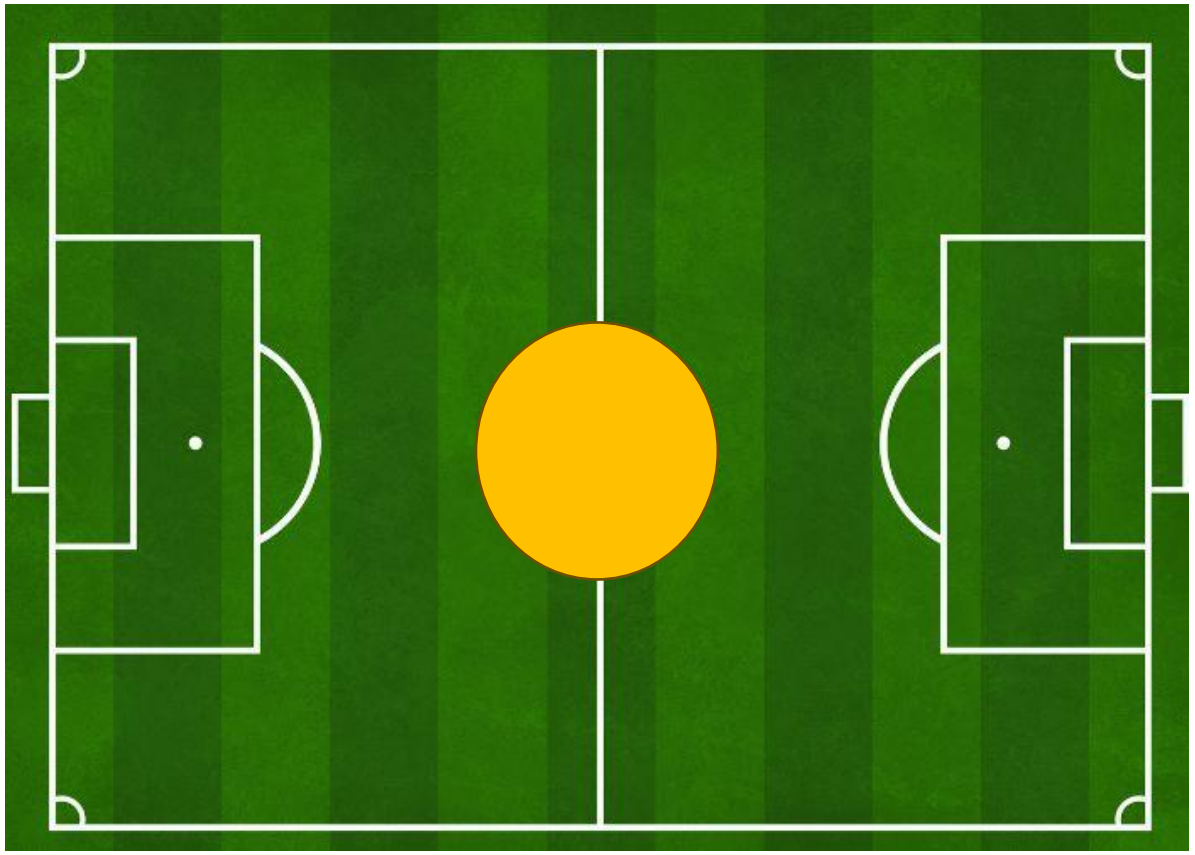
Tenant Farmers Association

Turning the corner on disenfranchisement - Law Commission review (some ideas)

- Rules of Good Husbandry
- Definition of Agriculture
- Compensation for land lost to development
- Contracting into the provisions of the Agricultural Holdings Act 1986
- Expanding the franchise for tenancy AHA succession
- Easier to use provisions to end long term FBTs
- Unreasonable refusal of landlord consent (FBTs in England)

Tenant Farmers Association

Turning the corner on disenfranchisement - embrace freedom of contract.



Tenant Farmers Association

DUCHY of CORNWALL

Reimagine the landlord tenant relationship

THE CROWN ESTATE

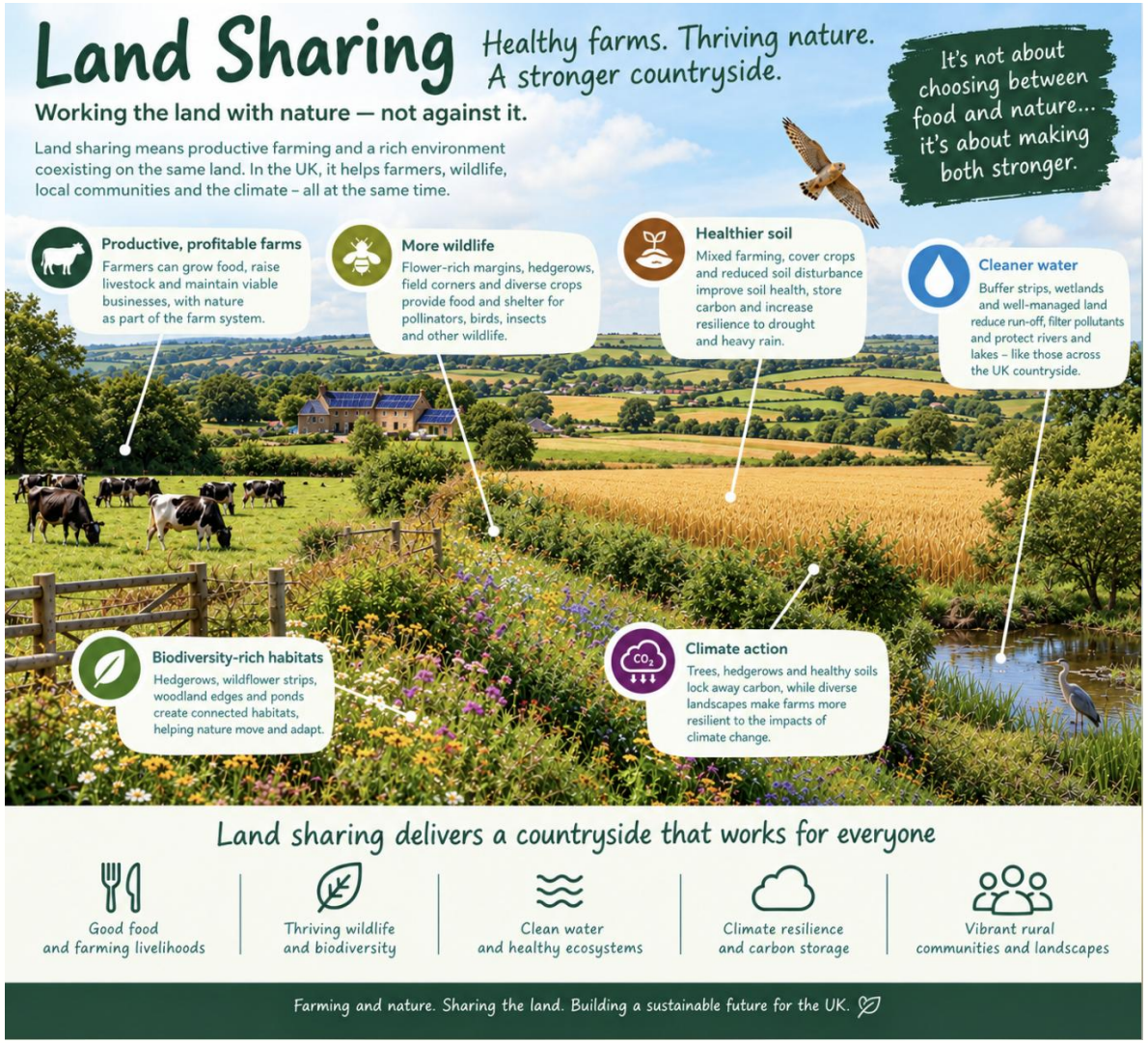
Tenant Farmers Association



Tenant Farmers Association

Turning the corner on disenfranchisement – land sharing not sparing…

…and no tenant should be harmed through the allocation of public funding.

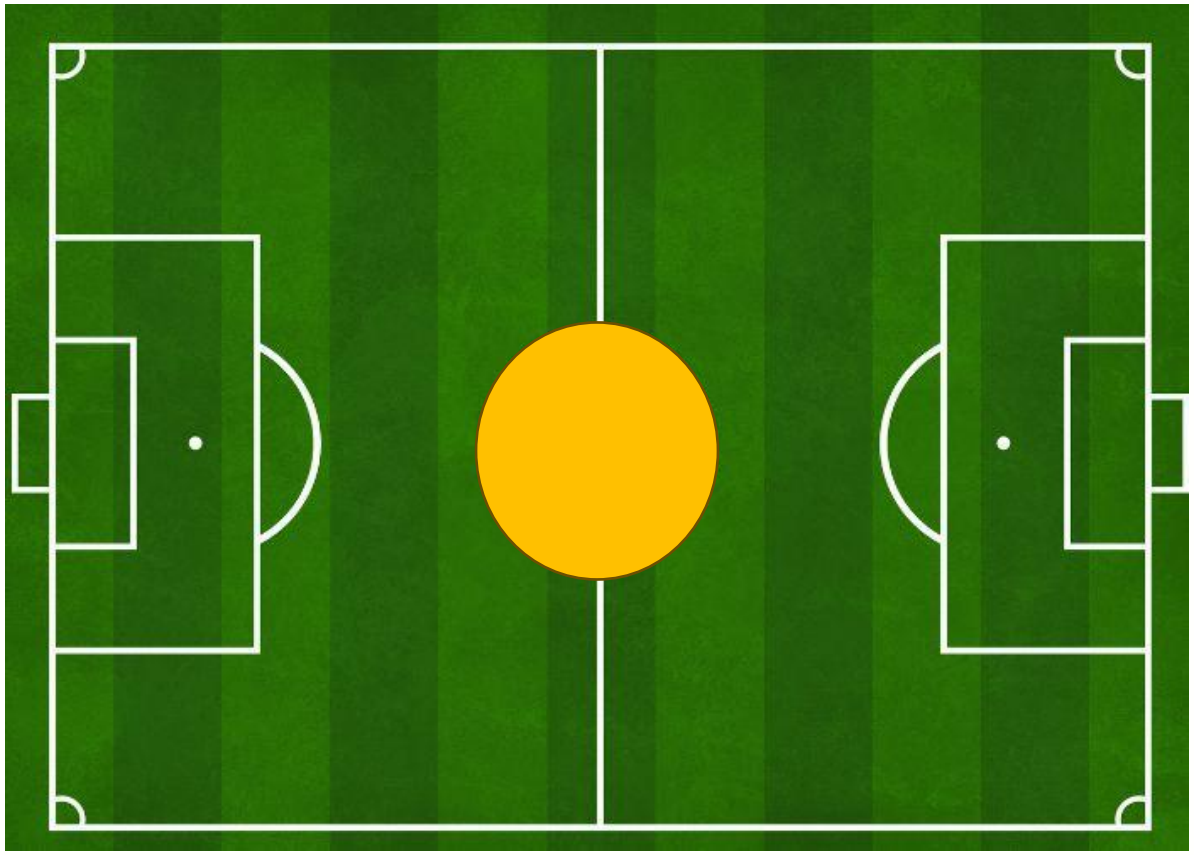


Tenant Farmers Association

The role of agents

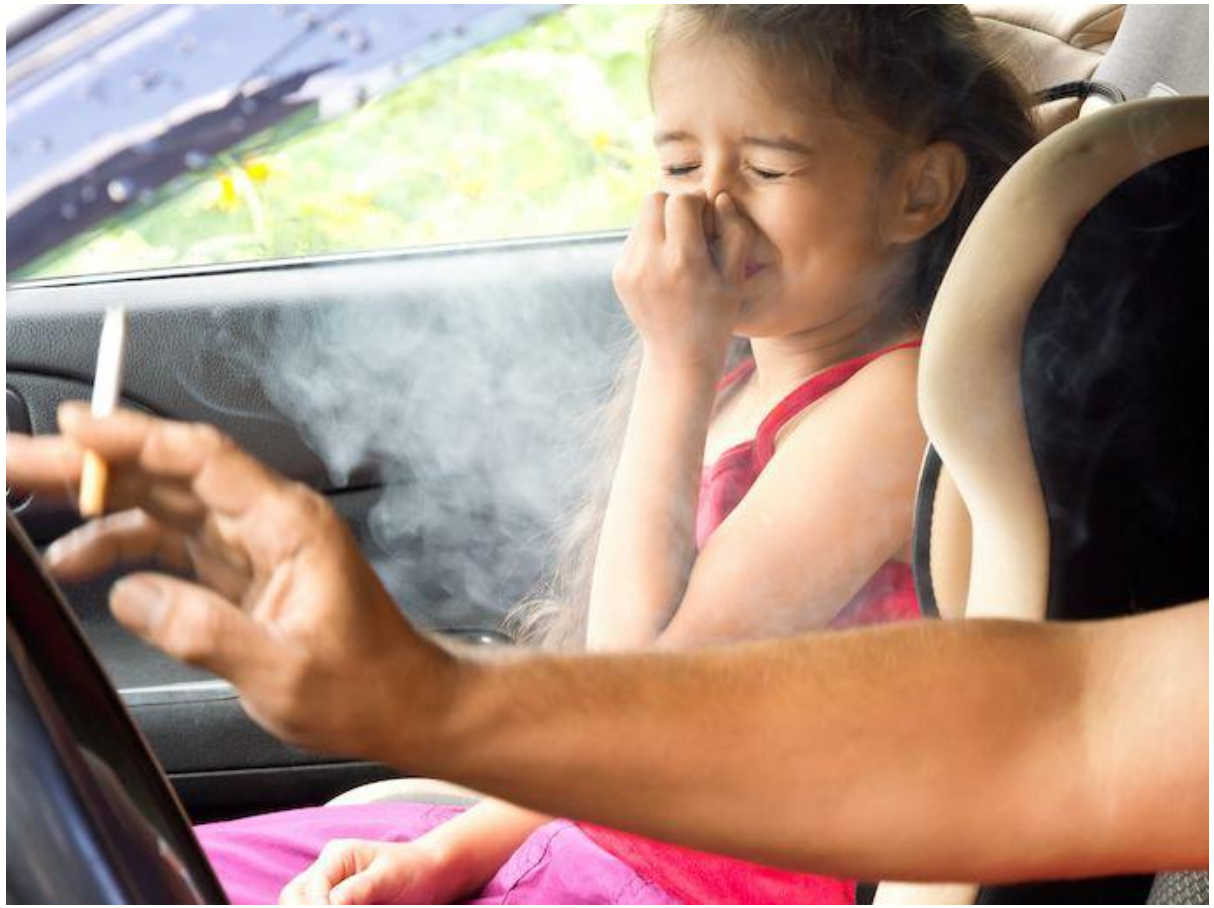


Tenant Farmers Association



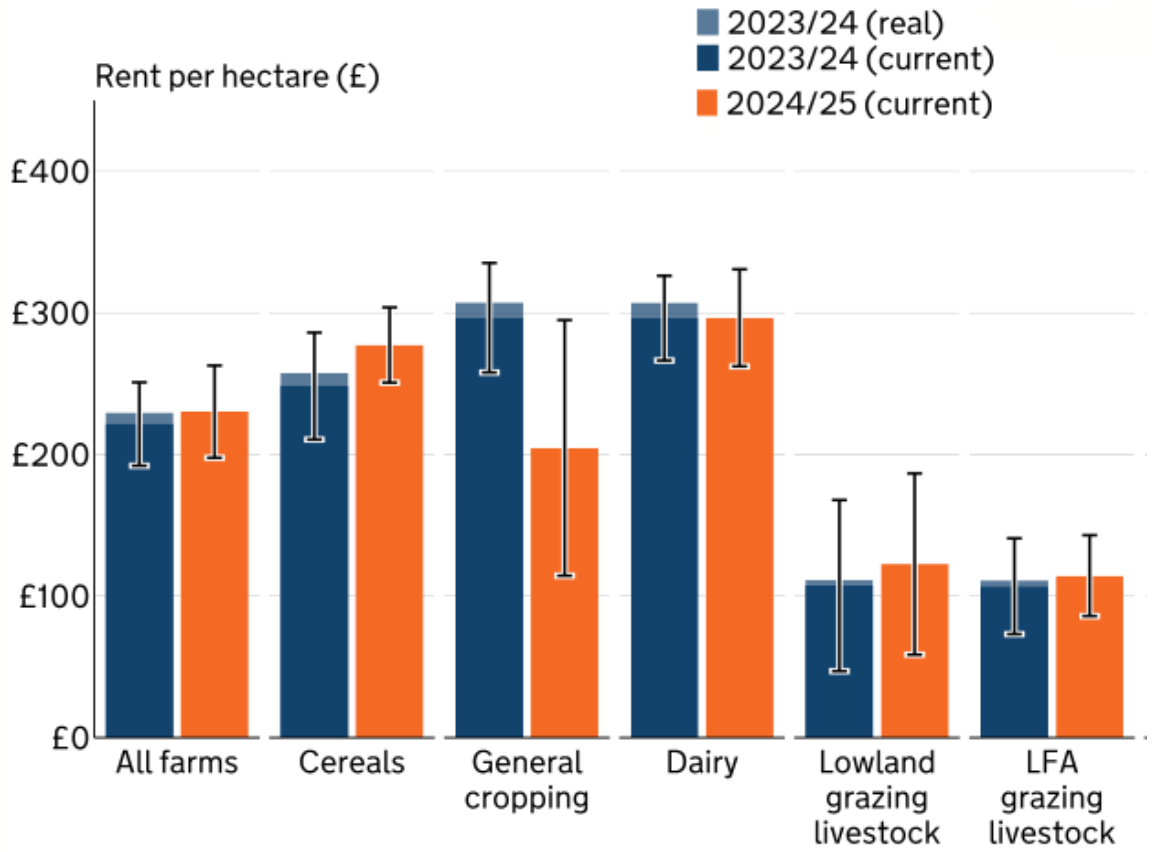
Tenant Farmers Association

Tender Rents



Tenant Farmers Association

Average annual rent for Farm Business Tenancies, in current and real term 2024/25 prices, by farm type in England, 2023/24 and 2024/25



Tenant Farmers Association

Turning the corner on Poor Conduct



SPRING SPRAYING
NEW FUNGICIDES AND STRATEGIES – P21

February 2 2024 | £4.10 | Become a member from £2.09 | farmersguardian.com

Farmers Guardian

THE HEART OF AGRICULTURE

NEXT GENERATION: SPRING IS COMING SEE P84

BUSINESS
Gap between wheat crop prices widens
PAGE 12

MACHINERY
Tractor sales see growing demand for power
PAGE 62

LIVESTOCK
Antimicrobial use on dairy farms falls further
PAGE 66

‘BULLIED’

● Tenanted sector relations strained ● Farmers feel ignored by landlords

By Rachael Brown

EXCLUSIVE

MORE than one-third of tenant farmers feel bullied by either their landlords or their landlord’s representatives, with 70 per cent of those questioned revealing they only saw their landlord’s agents when they wanted something.

The Tenant Farmers Association (TFA) has shared exclusive analysis with *Farmers Guardian* from a survey sent to members and non-TFA members in England and Wales. The study is in response to Defra’s call for evidence regarding the appointment of a Tenant Farming Commissioner.

Out of the 425 tenant farmers surveyed, 40 per cent of respondents said they felt ignored by their landlords, while just over 30 per cent went as far as to say they felt bullied by their landlords.

The survey allowed farmers to share anonymous comments. One farmer said: “I feel if you do not do as you are told or have an opinion, you are dancing on thin ice. They are bullies.”

TFA chief executive George Dunn said the ‘scores of comments’ like this ‘hit hard’ and demonstrated the struggle tenants have with their landlords and landlord’s representatives, adding it was ‘unacceptable’ for anybody to feel bullied.

The survey found the relationship between tenant farmers and landowners’ representatives to be ‘worse’ than with the landlord – 40 per cent said they were not easy to speak to, while 37 per cent claimed they felt ignored or bullied by them.

One farmer said: “I do not believe all agents are the same, but the one we have treats people like they are a piece of dirt on the bottom of his shoe, which in turn makes them unapproachable.”

Edward Dewes, a tenant on a Coventry City Council farm who could lose his tenancy due to a solar development, said he was ‘not surprised’ by the number of tenants raising issues with communication and poor behaviour.

He said more recently the balance of power has favoured the landowner, rather than ‘a symbiotic relationship, to the benefit of both’.

Mr Dewes added there was a need for some sort of referee to ‘readdress the balance of power’, warning ‘if there is no protection, tenants will cease to exist’.

Prolonged disputes were also brought into focus in the survey, with

CONTINUES ON PAGE 6

MAKING A MARK
Poultry farm builds on success Page 17

PICTURE: ALEX COLLARD

Only around one third of respondents agreed they had good relationships with their landlords

70% of respondents disagreed with the statement that they had regular meetings with their landlords.

30% of respondents said that they felt bullied or harassed by their landlords.

37% of respondents said they felt bullied or harassed by their landlords’ representatives.

91% of respondents said that there would be benefit in having a strong industry code of practice.

90% of respondents said it would be a good idea for the Government to appoint a Tenant Farming Commissioner.

Tenant Farmers Association

Agricultural Landlord and Tenant Code of Practice for England

Department for Environment Food & Rural Affairs

Call for Evidence: encouraging good practice in the tenant farming sector, and examining the potential role of a Tenant Farming Commissioner in England.

Date: 16th November 2023

Tenant Farmers Association

Introducing the Commissioner for the Tenant Farming Sector

Alan Laidlaw, 26 September 2025 - Tenanted sector, Things we're doing



Alan Laidlaw pictured with Secretary of State, Emma Reynolds. Credit Sam Ross.

Tenant Farmers Association

Relationships





Communication

Tenant Farmers Association

THANK YOU!

Panel Questions

Facilitated by

Adam Bedford

GSC Grays, Commercial Director





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Refreshment Break



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Matthew Wallace

Organising Committee Vice Chair

HSBC, Agricultural Relationship Manager



Jonathan Eckley

Director of International Trade,
AHDB



Global Opportunities

Jonathan Eckley

International Trade Development Director

Agriculture & Horticulture Development Board

Northern Farming Conference

4 November 2026

Export – why?

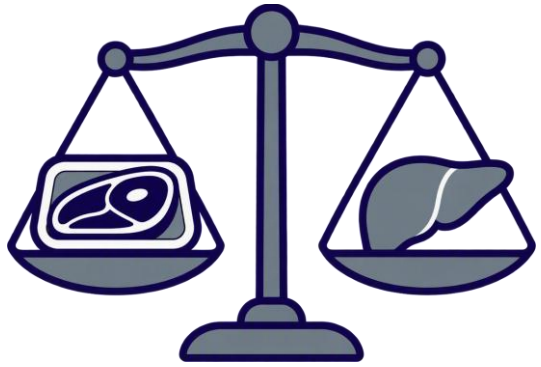


Generate price premiums



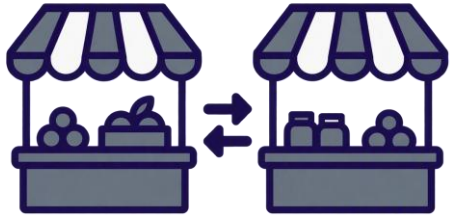
Domestic demand

Support where domestic demand is low



Commodity demand

Balance 5th quarter / variety meats



Encourage market competition

Competition for the domestic market

Trade - adding value

£4.2 billion

UK red meat and dairy exports

Full year 2025

£2 billion

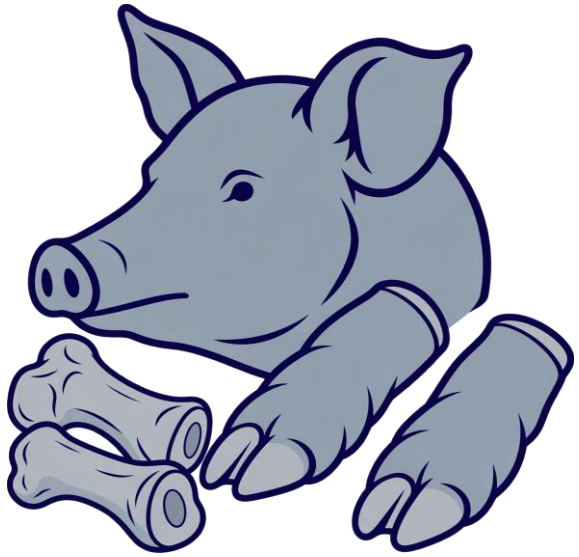
First half of 2026



Find the best home for every product



Premium cuts



Fifth quarter & variety meat



Premium British cheese

Matching product to demand



Customer priorities

Premium quality, provenance, consistency, functionality, convenience or price.

Market demand

Prime cuts, manufacturing inputs, co-products, ingredients and specialist formats.

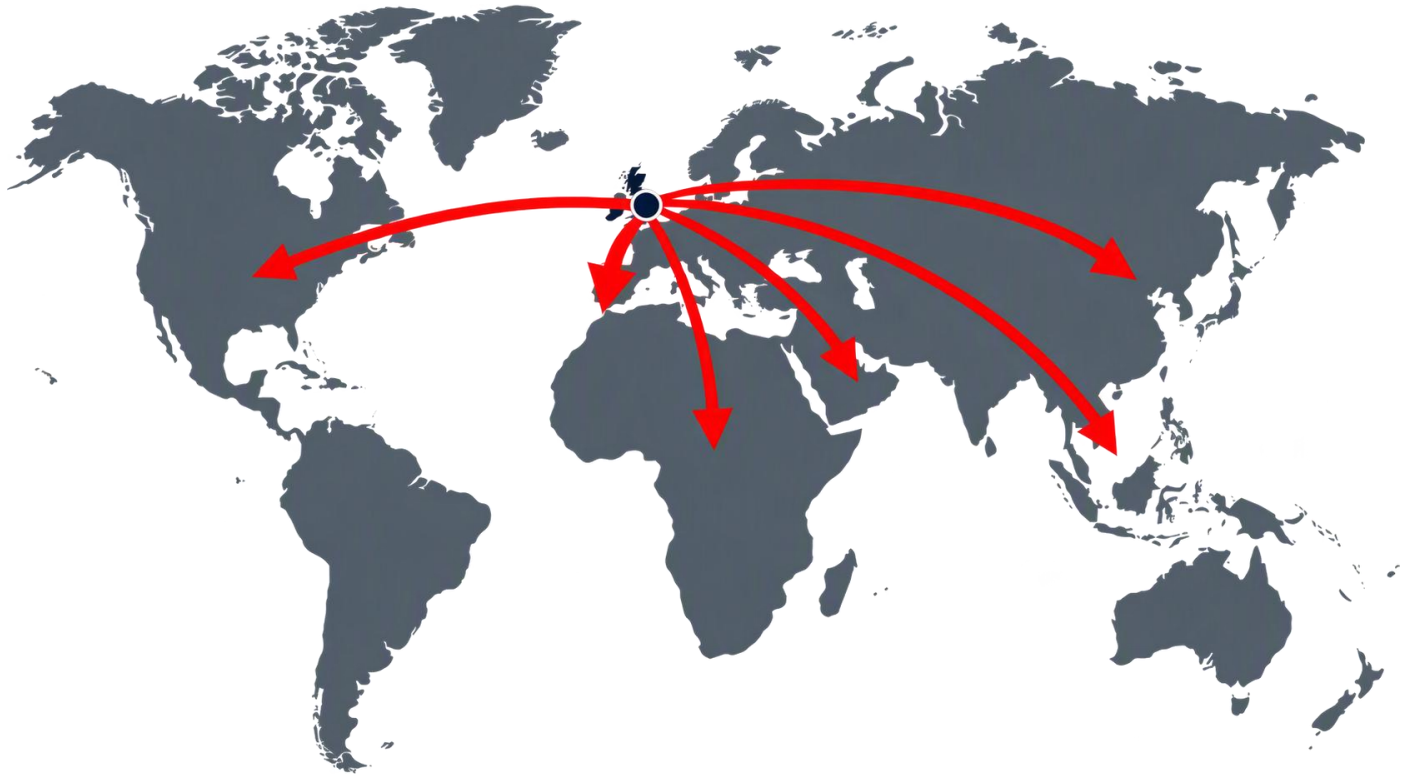
The opportunity

Segment supply and place each product with the customer who values it most.

The connection

Standards, animal health, traceability and consistency create the platform for export value.

A diversified market portfolio



Four market types

Different priorities

Maintain

Protect a strong UK position in mature markets.

Build

Grow UK sales alongside established competitors.

Invest

Develop demand where no supplier dominates.

Opportune

Small UK presence, fast growth and access or logistics hurdles.

Balance volume and value. Spread risk across products and destinations.

Four market types



Maintain

Strong UK position, mature market

Competition remains strong



Build

Established competitors, room to enter

UK exports increasing



Invest

Growing demand, no dominant supplier

UK exports starting to grow



Opportune

Fast growth, small UK presence

Access and logistics hurdles

How AHDB supports export growth



Market access



Market insight



Market development



Reputation



Production standards

Access to commercial sales



Access

Certification and technical approvals



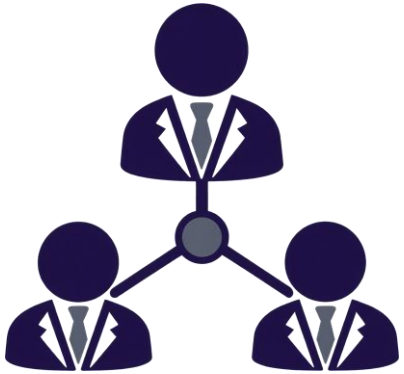
Product fit

Match specification, price and story



Buyer trust

Repeat presence builds confidence



Business relationships

Invest in lasting buyer relationships



Long-term sales

Build repeat sales and protect value

Buyer engagement



Trade shows

SIAL Paris takes UK exporters to a global audience.

Missions

Inward missions for beef and lamb, pork and dairy buyers, with farm and processor visits.

Follow-up

Commercial follow-up turns buyer engagement into sustained trade.

Insight → Access → Buyer engagement → Commercial follow-up → Sustained trade

Risks and realities



Animal disease



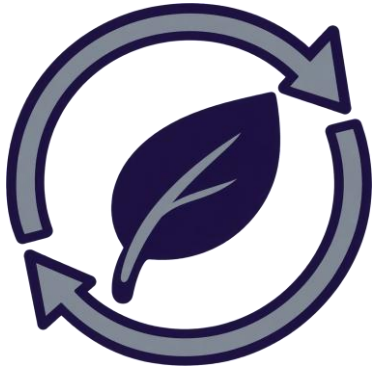
Consumer confidence



Geopolitical conflict



Spending power



Environment



Supply

International insight



Horizon & country reports

International Consumer Horizon and Country Focus reports



Meat-buying behaviour

Bespoke research across 4 regions



Consumer insight

Articles reviewing consumers in key export markets

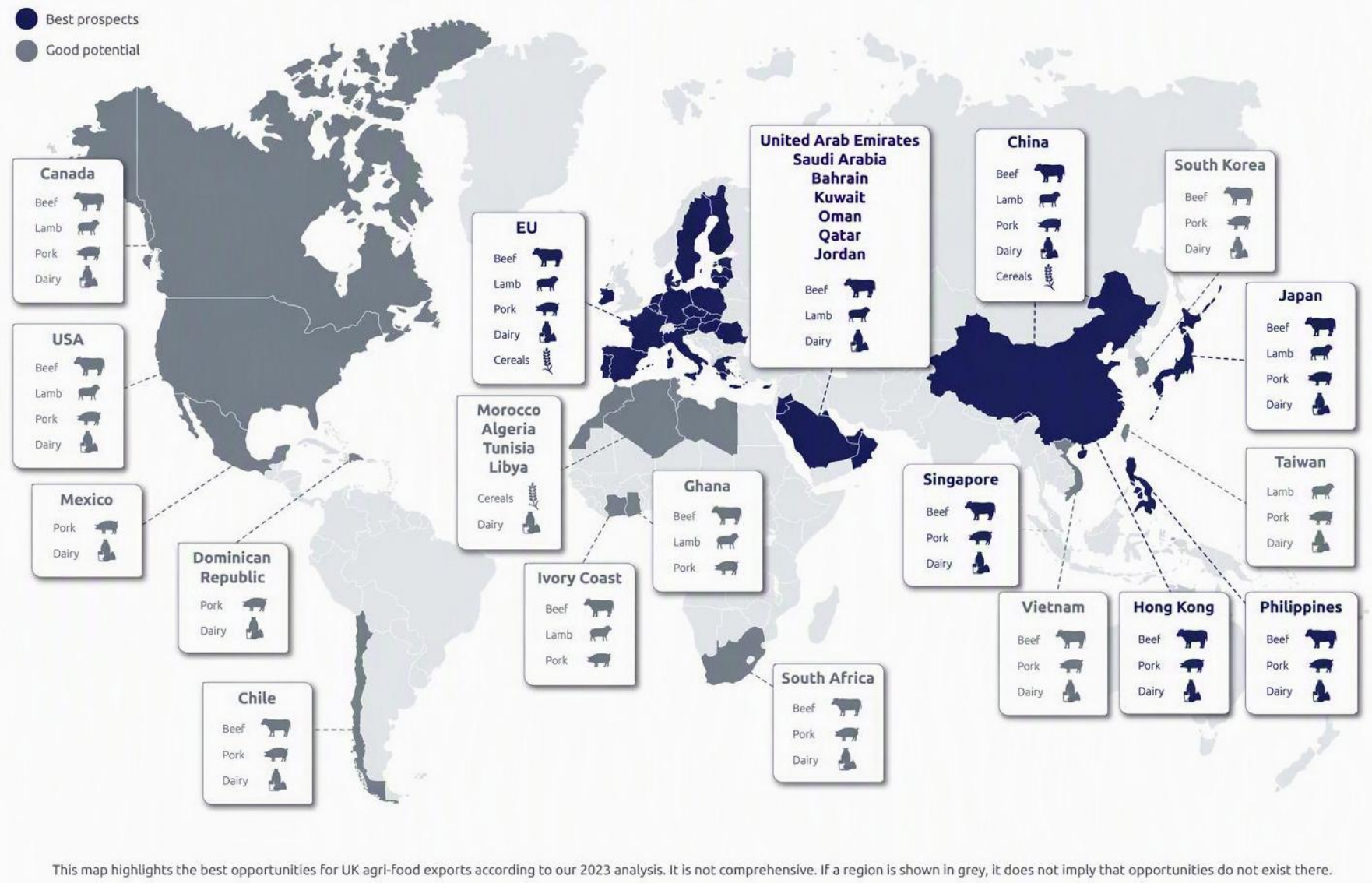
EU trade: UK–EU food deal



Source: BBC News, 3 November 2026

- **Draft deal agreed:** a UK–EU SPS agreement would remove post-Brexit checks on food and agri exports.
- **Lower costs:** ends export health and plant certificates and some inspection
- **Implementation & transition** – the detail!

Prospects for UK agri-food exports



What this means …



Where does my product go?

Ask about destinations and specifications. Be guided by market signals, your buyers & end-buyer relationships.

What's important?

Standards, traceability, animal health and consistency These all support both market access and commercial sales.

Growing long-term demand

A growing global opportunity

Long-term demand growth can create new outlets for high-quality British beef, lamb, pork and dairy.

Stay close to customers

Understand changing tastes, specifications and routes to market so the supply chain can respond early.

Complement the UK market

Opportunities across Europe, Asia and the Americas can broaden demand, improve product utilisation and strengthen resilience.

Act with confidence

Sustained presence, trusted relationships, we have great products and proposition turn market potential into lasting value.

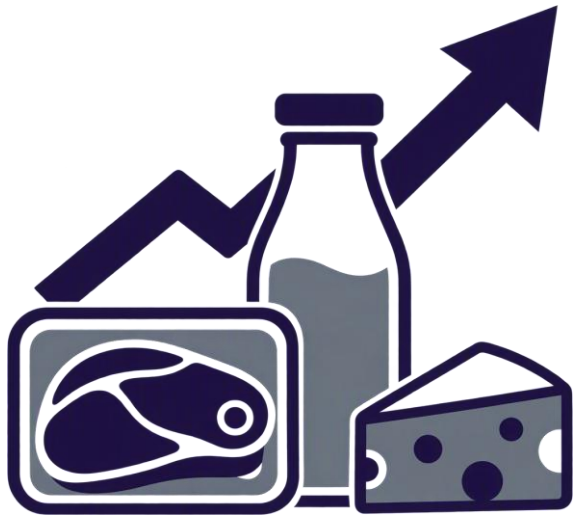
Long-term demand for meat and dairy



Population growth



Rising incomes



Growing demand

+6%

Projected increase in global daily calories per person from animal-source foods by 2034

Source: OECD–FAO Agricultural Outlook 2025–2034,


QUALITY
MEAT & DAIRY
from Britain
Thank you
Jonathan.eckley@ahdb.org.uk
Brought to you by
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PROUD
TO SUPPORT
GREAT

Freddie Humfrey

Head of Grain Trading,
ADM Agriculture

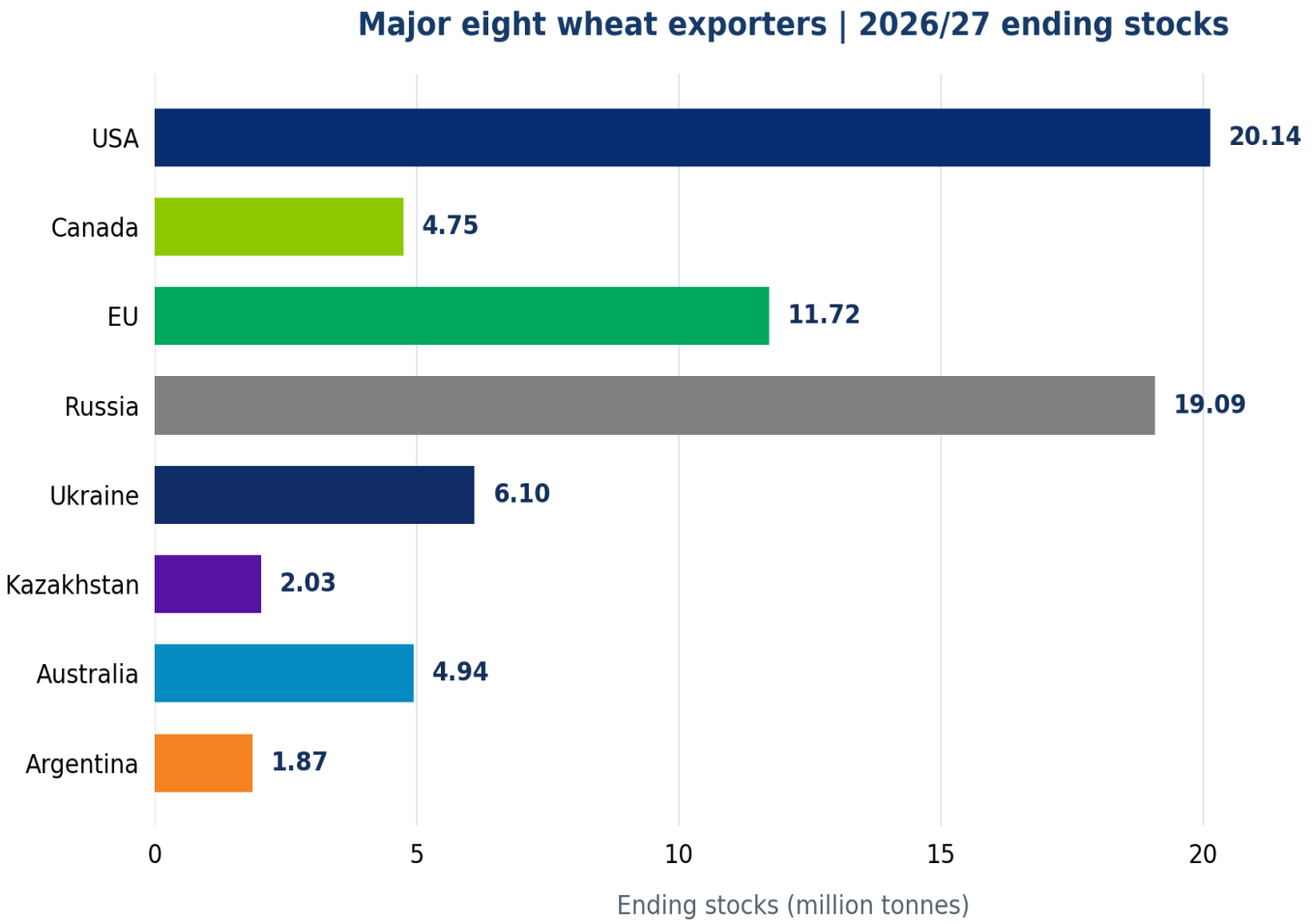




GLOBAL GRAIN MARKETS

Wheat supply and demand does not fully price

Northern Farming Conference | 2026



Source: USDA WASDE / PSD, 9 October 2026 | 2026/27 marketing year

VALUATION SNAPSHOT

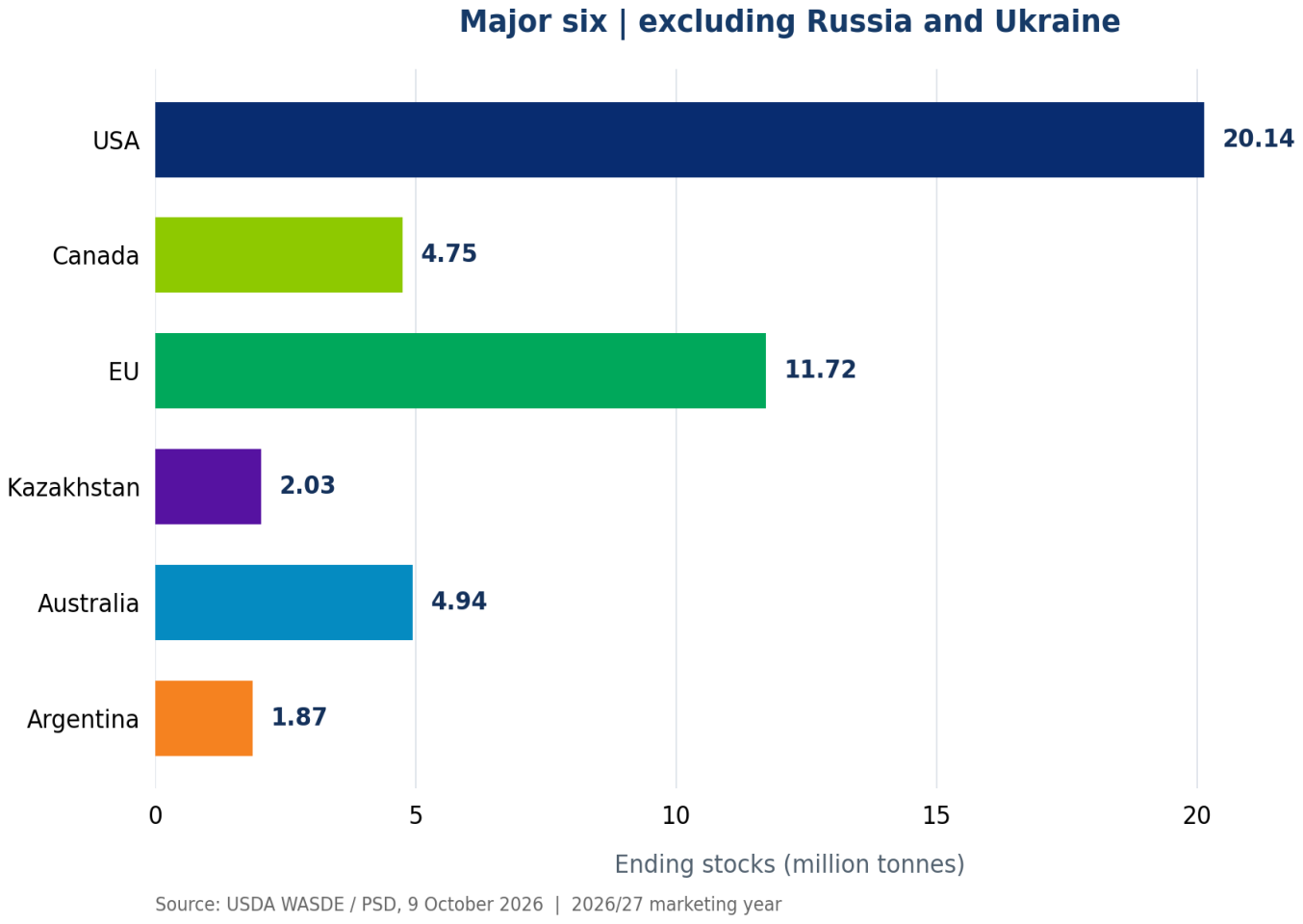
2026/27 exporter stocks: 70.64 Mt

Stocks/use (domestic + exports): 17.1%

Russia + Ukraine stocks: 25.19 Mt

USDA October 2026 balance. Fair value is not implied by STU alone.

MAJOR SIX EXPORTERS | EXCLUDING BLACK SEA | USDA FIGURES



Source: USDA WASDE / PSD, 9 October 2026 | 2026/27 marketing year

WHY THE SPLIT MATTERS

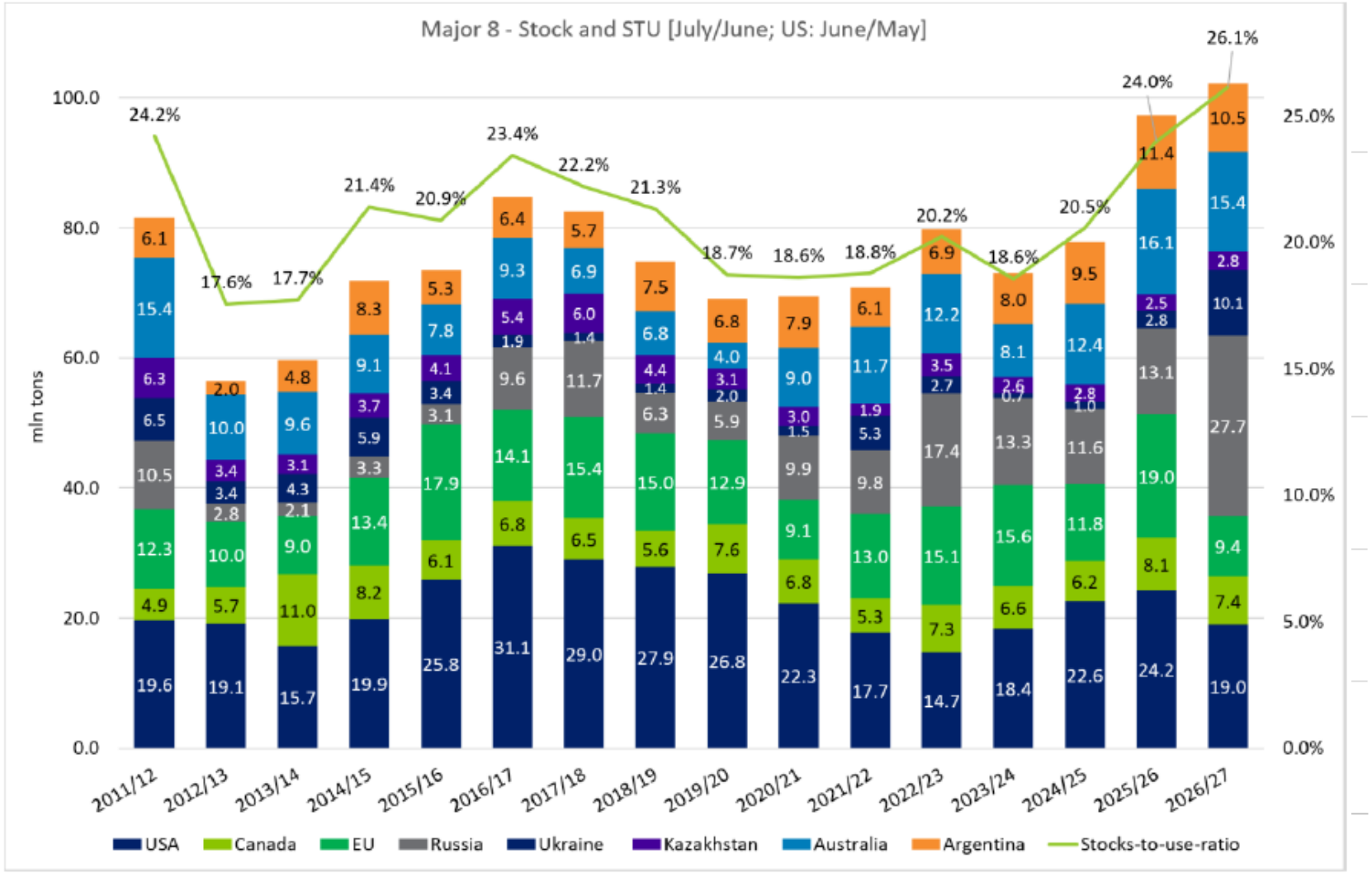
Excluding Russia and Ukraine: 45.45 Mt stocks; 14.7% stocks/use.

Black Sea represents 25.19 Mt of Major 8 ending stocks.

Availability depends on freight, export policy and logistics.

STU = stocks / (domestic use + exports).

MAJOR EIGHT EXPORTERS | GENERAL TRADE VIEW



VALUATION SNAPSHOT

2026/27 exporter stocks/use: 26.1%

Indicative CBOT fair value: 575–585¢/bu

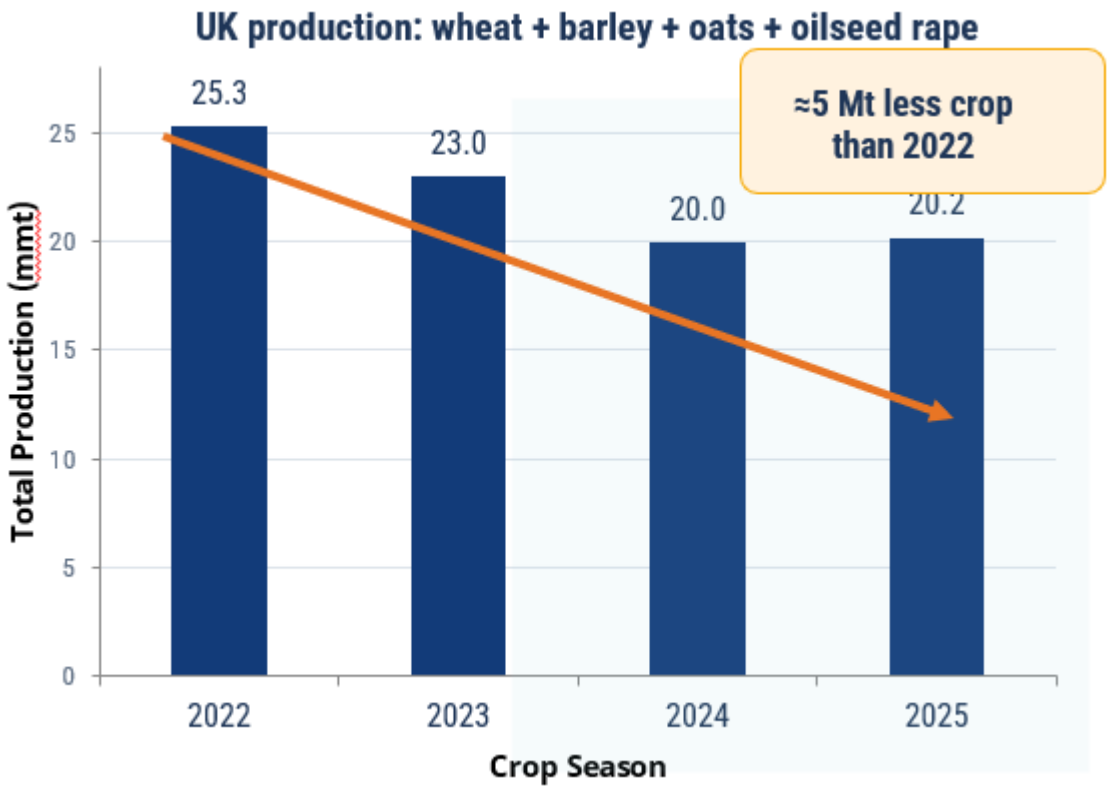
Market reference: 640¢/bu

Implied premium: $20–25/mt

directionally back towards the comfort implied by the original slides.

UK Combinable crops – relative price increases as production drops

UK combinable crop trade flows



Sources: AHDB / Defra final UK harvest estimates (2022–2025); AHDB grain market analysis on UK import parity (2024).

KEY OBSERVATIONS

UK has had a poor combinable crop production for the second year running

Small crops have resulted in deficits and import requirements on feed wheat, faba beans and oats in particular

Pricing has appreciated/appreciating to a point where other like for like supplies are available

UK–EU SPS ALIGNMENT | AGRICULTURAL IMPLICATIONS

Proposed dynamic alignment • Mid-2027 remains a target; negotiations ongoing

THE TRADE-OFF: LESS BORDER FRICTION ↔ CLOSER ALIGNMENT WITH EU RULES

POTENTIAL UPSIDE

- Fewer SPS checks and certificates
- Lower friction and delays for eligible EU trade
- Simpler movement of qualifying agricultural products
- Potential disease-control cooperation

POTENTIAL RISKS

- Changes to GB-approved pesticides
- MRL changes affecting existing crops and stocks
- Reduced ability to diverge from EU rules
- Transition costs and agronomic uncertainty

WATCH POINTS

- November 2026 UK–EU summit
- Scope of exemptions and transition periods
- Affected actives and MRLs –PhosAl & T2H2 eg
- Treatment of existing stocks
- Third-country import implications

MERCHANT VIEW | Initial impacts are more likely through input availability, crop cost, quality and trade friction than an immediate move in outright grain prices.

Sources: Farmers Weekly; NFU; House of Commons EFRA Committee (2026). Proposals remain subject to negotiation.

Questions

Facilitated by

Matthew Wallace

Organising Committee Vice Chair

HSBC, Agricultural Relationship Manager





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Lunch Break





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Samantha Charlton

Organising Committee Chair
Owner and Founder,
Planning for Profit



Georgina Lamb

The Farming Community Network

FCN THE FARMING COMMUNITY NETWORK

SCAN ME



NORTHERN FARMING CONFERENCE

Panel Questions

Facilitated by

Jen Oglesby

Farm Trader & Small Seed Lead, ADM



Farmer Panel

Jamie Leslie

Mixed farmer, Shetland

David Cross

West Norfolk farmer

Joe Nelless

Livestock farmer, Morpeth



Panel Questions

Facilitated by

Jen Oglesby

Farm Trader & Small Seed Lead, ADM



Anna Jones

Rural affairs journalist





Northern Farming Conference

THE STORIES WE TELL:

Is it time to change the record?

Anna Jones

November 4th 2026

JONES THE JOURNO

First and foremost, a farmer’s daughter



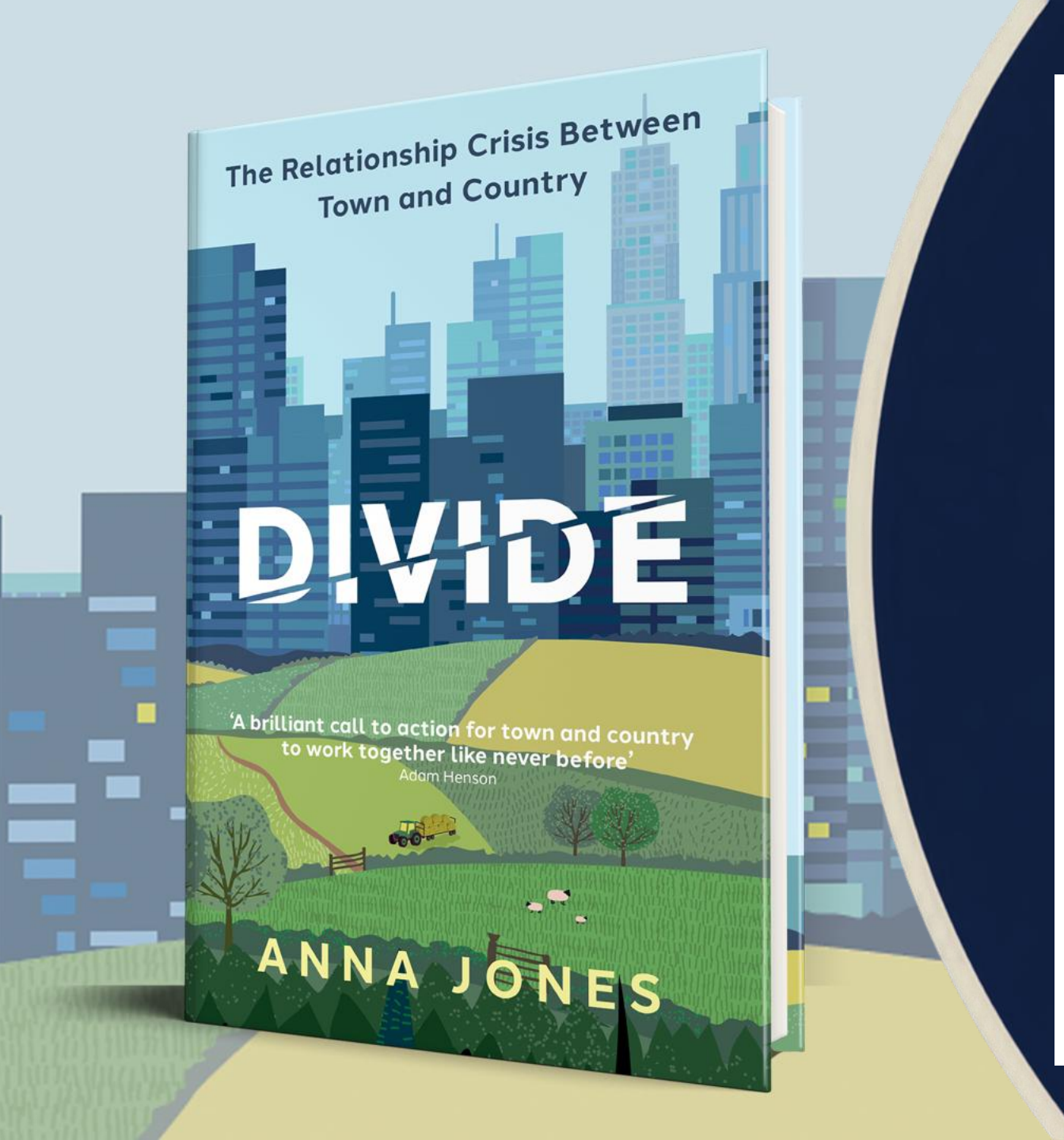
“There’s no time.
We’re too busy.”











chapter two

work

A farmer never switches off. Growing up, Dad was always working. Not hidden away in an office, or constantly on the phone or in meetings – like workaholic executive dads in movies – no, he was always around; it was just his jobs were never, ever Wnished.

Dad's work was also our holiday time, spare time, and family time. In fact, we never even called it work – it was always referred to, rather reverently, as our 'way of life'. An all-encompassing existence. There was no beginning or end to the working day – it was just a day. As a result, I grew up with the very distinct impression that only town people 'worked' while we had a 'way of life'.

My happiest childhood memories are of climbing up into the cab of our stock lorry with Mum, Dad and my two younger sisters, Kate and Nicola, with an enormous picnic. We'd drive down-country to the lowland grazing Dad rented on the banks of the River Severn near Shrewsbury and spend our entire Sunday sorting fat lambs for market on Monday or weaning lambs or tailing ewes (trimming the pooey bits off their bums so they don't get maggots in the hot weather).

Sometimes, maybe once a year, we would take a day trip to the beach in North Wales. We had one foreign holiday to the Algarve in 1993. But mostly, family fun, relaxation and recreation were all tied up with farm work.

“There’s no money. We’re struggling.”



“It’s all for the next generation.”









“We are a tight knit community”





Why is storytelling important?


SOS: SUPPORT OUR SUBPOSTMASTERS
MR BATES
VS
THE POST OFFICE

Stories influence



Stories drive change

The Daily Telegraph

Starmer waters down inheritance tax raid on farmers after backlash

Labour to raise levy threshold from £1m to £2.5m following rural campaigners' protests



Ministers raise inheritance tax threshold for farms after backlash

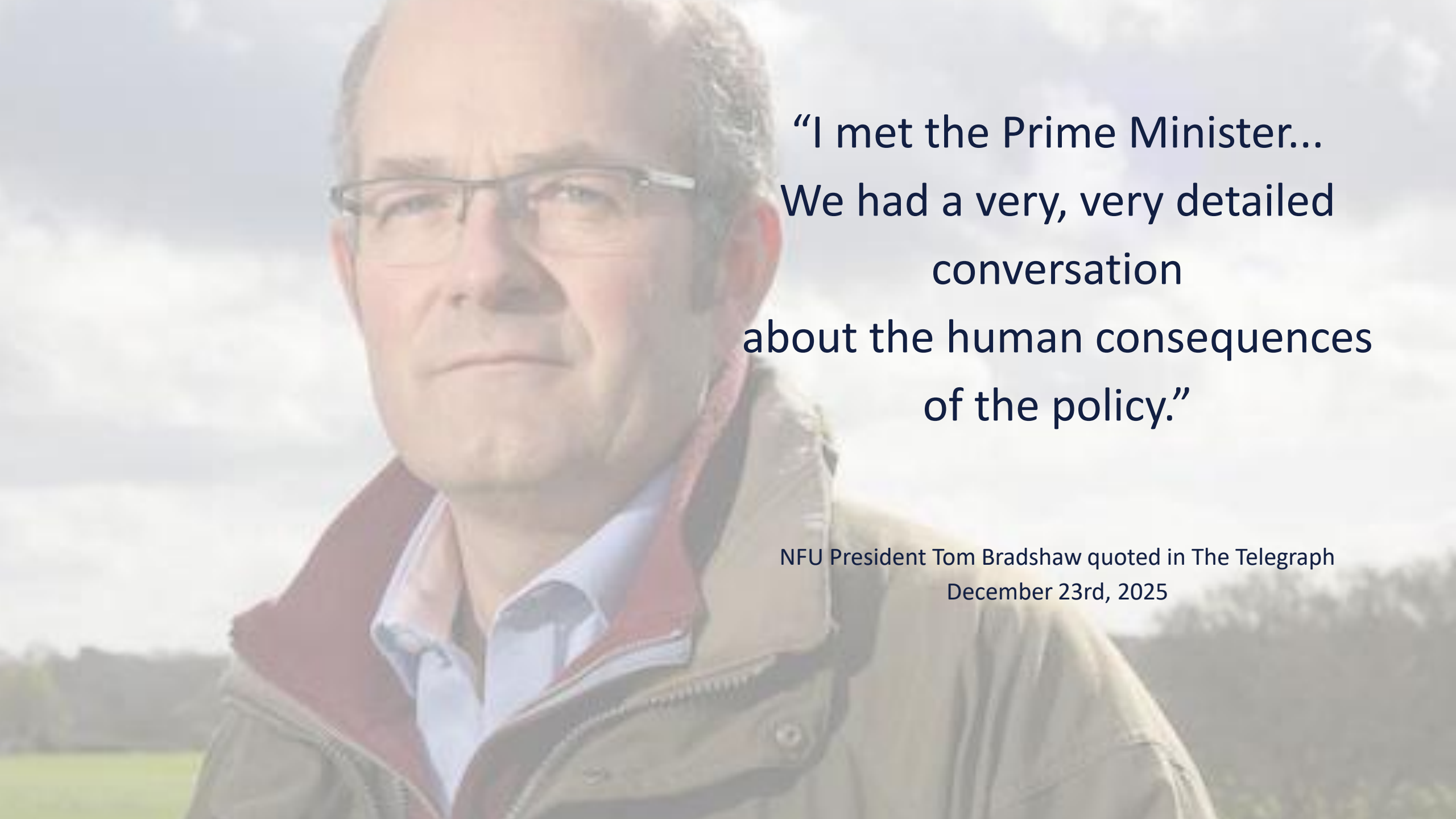
The Guardian

UK

'Santa has come early for farmers' after inheritance tax climbdown

BBC NEWS





“I met the Prime Minister...
We had a very, very detailed conversation
about the human consequences of the policy.”

NFU President Tom Bradshaw quoted in The Telegraph
December 23rd, 2025

The narrative of peril works



But does it always serve us?

Stories shape identity and beliefs



“There’s no time.
We’re too busy.”

“There’s no money.
We’re struggling.”

“It’s all for the
next generation.”

“We are a tight
knit community”









“Does no time off attract talent?”

“Does struggle attract investment?”

“Is there one?”

“Are we welcoming?”









Flippin’ narratives



What are we proud of?

What do we want people to see?

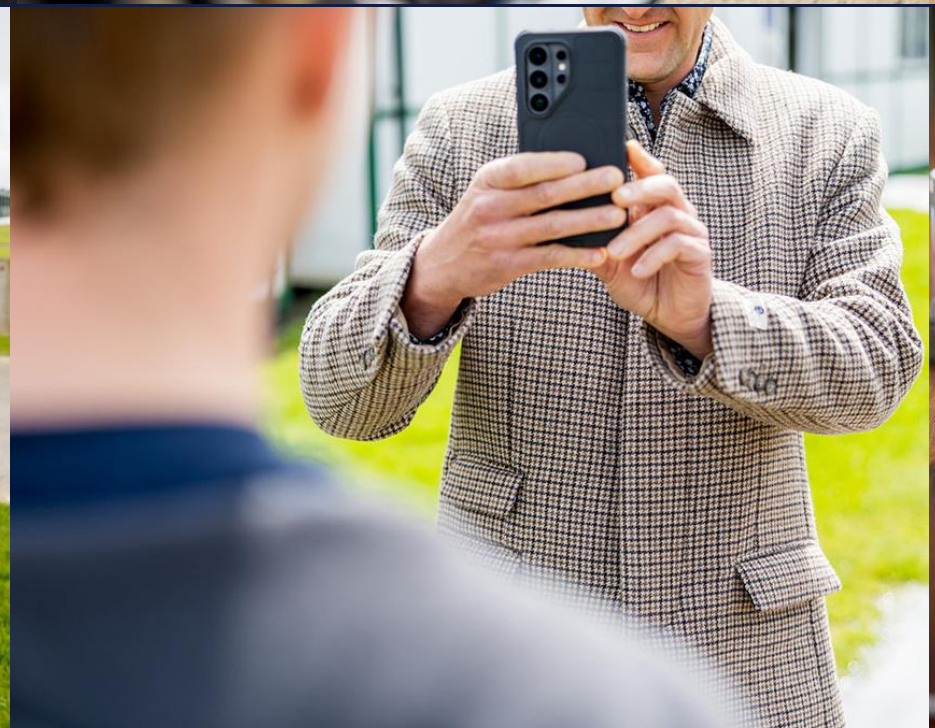
What EXCITES us?









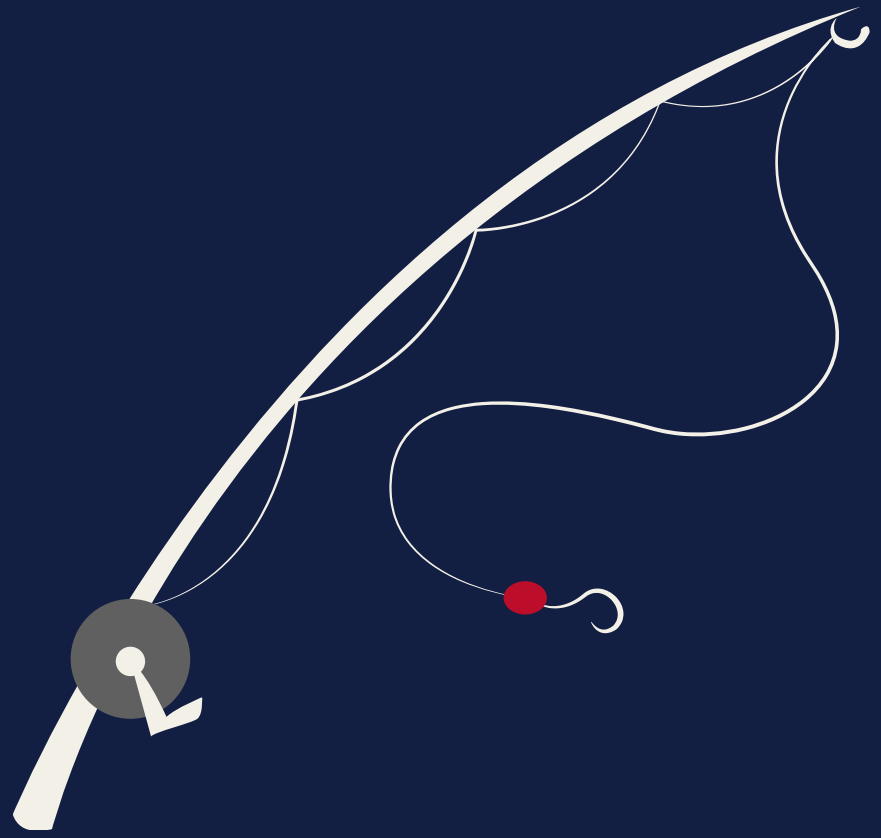



Professional
Respectful
Open-minded
United
Dedicated

Bridging divides and building community through the power of storytelling




TRESPASS



Hook your audience

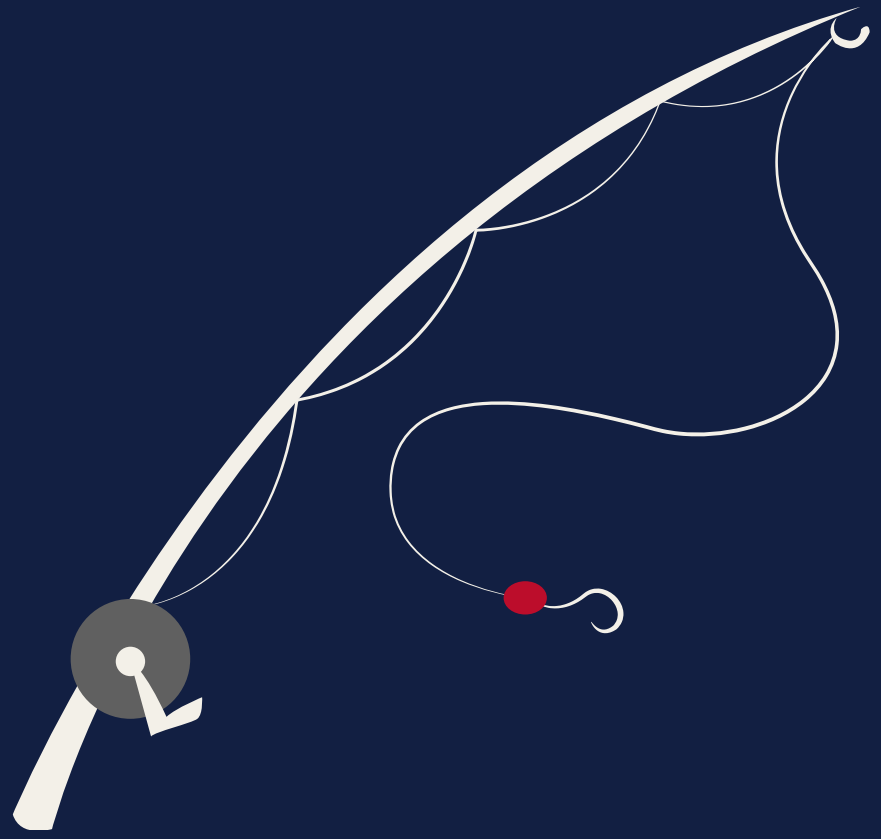


“Two five-year-olds wrap their arms around Dad’s wellies and drag him towards the school bus:

“Can we take Farmer Tony home?”







Now it’s your turn!

1. One sentence,
2. Something positive,
3. Hook the room!

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JONES THE JOURNO



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Thank you

Samantha Charlton

Organising Committee Chair
Owner and Founder,
Planning for Profit

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