

GREENWOOD CRAFTS : MARKET TRENDS REPORT

MAY-JUNE 2005

This report is based on information supplied by 36 informants across England in the period 5 May- 22 June 2005

The 2005 outdoor season appears to have started well with almost all districts reporting a strong demand for coppice products and charcoal, at the same level or higher than last year. Parts of southern England had a slow start after a poor winter, but showed a marked recovery from early April. Prices are broadly similar to or slightly up on 2004, and on average 20-25% higher than in year 2000. 2004-05 profits could be dented by rising fuel prices and in some areas by the higher price of coppice.

MAJOR PRODUCTS

Wattle hurdles

Demand is currently buoyant, encouraged by positive comments on TV gardening programmes. The Chairman of the Surrey and Sussex Coppice Group has described the market as “crazy”, with a well above average number of enquiries for hurdles and garden wares generally. Hampshire, Dorset, Sussex, Wiltshire, S. Oxfordshire, Suffolk, Lincolnshire and Cumbria all report good business and full order books. A particular feature of the present season is the rage for continuous wattle fencing made in situ, such as has featured as a backdrop in Gardener’s World TV programmes. A number of makers have already secured valuable orders for 2006. Continuous hurdle and design fencing have a clear potential, especially in high income areas, if makers are prepared to travel. Willow garden wares – fencing, Edging, plant climbers - are also selling well, although some makers report the market a little weaker than last year and prices reluctant to improve.

Thatching Spars

In the all thatch districts demand remains very brisk, with makers fully employed, dealers handling higher volumes, and prices 5-10% in advance of last year. The market is especially stretched where supplies of hazel are seriously deficient, and gads and/or finished spars have to be bought in from southern England, or from Eastern Europe. In Northamptonshire the position has been described as “desperate”. Dorset and Devon remain large net importers. Norfolk too is poorly supplied, one of the small handful of spar makers in the county having recently died.

Hedging materials

Demand remains brisk throughout the Eastern Counties and south midlands where a number of DEFRA-funded hedgerow reinstatement projects are under way, and large quantities of stakes and binders are having to be sourced from southern England. A “huge demand” for stakes is reported from Cumbria.

Charcoal

Producers with assured markets report good business. Problems arise where retail grocery and garage chains have switched from local sourcing to central buying. As a consequence growing numbers of outlets no longer stock locally-produced charcoal and firewood. The smaller more occasional producers find it difficult to meet the stringent delivery schedules demanded by distributors, such as Bio-Regional. Many producers in the north and south-west are said to be “struggling”, with orders down on last year and trading conditions more competitive. The position was not helped by a late start to the barbeque season, but has picked up from mid-June with the onset of better weather. Gas-fired barbeque sets are perceived as a possible future threat to the British charcoal industry.

Other products

Post and Rail and Post and Wire Fencing. Demand for post and rail fencing for residential use in the horse-keeping and chestnut districts of the south-east remains strong, but supplies are short due to a lack of cutters. Likewise with pole and wire fencing where declining numbers of cleavers depresses an industry struggling to beat off competition from plastic and lap fencing.

Hay rakes. A steady if small demand. Specialist makers are now effectively reduced to just one, John Rudd of Cumbria. Trevor Austen, who makes ‘south country’ rakes at his village workshop at Sneed, near Ashford, Kent, is likely soon to retire for reasons of ill-health.

Trugs/s pale baskets Steady. Slight improvement on last year (W. Sussex). Owen Jones, of Nibthwaite, Cumbria, is the sole specialist maker of oak spale baskets.

Prices Current (as reported)

Table 1

	COUNTIES	PRICES (£)
Hazel wattle hurdles (6x6 feet)	Dorset	42 collected, 48 collected (both to dealers)
	E. Hants	60
	NE Hants	60
	NW Hants	40 collected, 60, 60-65
	W. Sussex	77, 65-72, 48 collected
	Devon	60-72, 60, 72, 60
	Wilts	80
	S. Oxfordshire	78
	Shropshire	60-72
	Northants	50 (6x3)
	Suffolk	108 (6x6 continuous erected per panel), 60 (standard)
	Lincs	45-60 collected
	Cumbria	60-65, 60 (6x5)

Polish hazel hurdles (6x6) are reported to be selling wholesale at £17-20 and retailing at £45 -55. One national mail-order firm is advertising 6x3 hurdles (probably Polish) at £59 or £177 for 4, 6x5.5 hazel hurdles at £64 or £207 for 4, and 6x5 willow hurdles at £79 or £237 for 4, carriage paid. Carl Sadler of Malmesbury, Wilts reports 6x6 English hazel hurdles priced at £120 at Bexley, Kent.

Most makers will deliver locally at no extra charge. Dealers making regular purchases will normally collect from the roadside or the woods. Some makers deliver up to 80-100 miles, charging carriage.

A sizeable trade in raw materials, mainly gads and spars, hedging stuff, and hurdle rods, is carried on between the surplus hazel growing districts of central southern England and other parts of the country. Hampshire hazel is sold as far away as Derbyshire. Wattle hurdles are exported from Hampshire, Dorset and W. Sussex into northern England, southern Scotland, South Wales and Ireland.

Table 2

	COUNTIES	PRICES (£)
Gate Hurdles (6x4, 6x3^{1/2} feet)	Wilts	35
	Essex	35
	W. Sussex	40
	Avon/Somerset	40
Willow hurdles	Wilts	35 (6x3)
	Somerset	59 (6x6)
	Lincs	40-50 (6x6)
Thatching spars x1000	Dorset	130, 115, 100-110, 100
	NW Hants	90 collected, up to 150 delivered
	N. Hants	100 collected
	Somerset	100-110 collected
	Devon	120+VAT
	Norfolk	100-120
	Cumbria	100-110 collected
Bean rods	NW Hants	£6 per 10
	SE Hants	£4.5 per 10
	Essex	£4 per 20 (8 foot)
Pea sticks	NW Hants	£3 per 10
	SE Hants	£3.60 per 10
	S. Oxon	3.85
Hurdle rods	NW Hants	35p + VAT
	SE Hants	31p
Hedging stakes	E Hants	40p
	Northumbria	£12 per 30
Besons	S. Oxon	9 retail
	Lincs	10
Hay rakes	Cumbria	10 direct, 15.40 retail
	Kent	

Charcoal 3 kg bags retail	Dorset	Wholesale £3, retail £4
	Devon	£3 (2kg)
	W. Sussex	Wholesale £3.10, retail £4.90
	Somerset/Avon	4
	S. Oxon	5 (3.75 kg)
	Cumbria	4
	Lincs	3.50-4

RAW MATERIALS

The 1998 Forestry Commission Woodland Inventory shows very little in-cycle coppice existing outside of south east and south central England. Shortage of raw material, especially hazel, is seen as the major obstacle to the growth and future sustainability of the industry in most other parts of the country. Acute shortfalls are reported from Devon, Cumbria, the Midlands and Eastern Counties. Small parcels of restored coppice are coming on stream, but not in sufficient quantities to affect overall levels of craft activity. In Cumbria the coppice area is growing, but hazel is said to be declining. Where young wood is not available charcoal and fire wood are the main products. Very few wattle hurdles are made outside southern England. Over much of the country, 'gate' rather than 'wattle' was the traditional form of fencing.

Investment in coppice restoration in Hampshire since the 1980s seems to be paying off. In the north of the country, prices are coming down, down and quality improving with each cut. Growers struggle to sell grade 3. Prices vary unaccountably from estate to estate. Again in Hampshire, one estate reports a large unsatisfied demand for grade 1 and better grade 2 hazel, another reports prices for grade 2 slightly lower than last year, and another a slackening of interest, and fewer enquires. Hazel fit for hurdles, spars and hedging stuffs sells well almost everywhere.

A general complaint in most chestnut and hazel growing districts is the shortage of wood-cutters. This has meant fewer coppices being cut, coppice restoration programmes being put on hold, and where inexperienced cutters are employed, poor standards of woodmanship. Historically craftsmen were supplied with their raw materials by woodmen, but now have to cut their own wood. The old woodmen were the main suppliers of bean poles and pea sticks. In Kent, chestnut contractors pick and choose, and are at times hard to control.

Complaints are as much about quality as quantity. Deer, rabbits, disinterested land owners, and poor standards of woodmanship are blamed in varying degrees for the deterioration in quality. The Forestry Commission could be more helpful in this regard. Its 'multi-purpose forestry' programme ranks bio-diversity, access, recreation and public benefits generally on the same level but often more highly than wood production. In restoring neglected coppice 2-3 cuts may be necessary to produce wood of a workable quality. New planting- simple coppice, densely stocked, deer-fenced, yielding top quality wood -is a possible way forward. The current woodland

improvement grants scheme offers farmers and landowners an opportunity to plant new coppices for craft use.

FOREIGN COMPETITION

Shortfalls in supply have for many years been filled by imports of finished products and raw material from mainly Eastern Europe and south-east Asia.

Large and growing quantities of thatching wood and since 1993 years finished spars are imported from Poland and Belarus. In many districts Poland supplies the greater part of the annual requirement, and nationally as much perhaps as 40%. No reliable statistics exist as to the scale of this trade, nor detailed information about supply chains. Large numbers of hazel hurdles are imported from Poland, and are sold mainly through garden centres and fencing stockists.

Polish imports of hurdles and spar wood appear not to have impinged too severely on English makers, nor on prices. The fear is that Polish wood products will undermine the reputation of the home made article and destroy the market. Polish hurdles are sawn, nailed rather than twisted, and last only 4-5 years as against the 7-9 of the much more robust English hurdle. They sell wholesale for £17-20 and retail at £45-55. Most English makers, except in north-west Hampshire, sell direct to the customer where imported hurdles are sold mainly through wholesalers or large retail outlets.

Polish spar wood (gads) is said to cleave easily and straight. In contrast to English hazel it is unaffected by deer. It is claimed that growing conditions and the tendency for it to be cut late, make Polish hazel somewhat brittle and lacking in "spring". Polish made spars are said to be liable to snap across the middle "twist" section. However, most spar makers are happy to work with Polish wood as it allows high working speeds. The prices of spars made from English and Polish hazel differ little.

English-made willow products are under greater threat than those made from hazel. Prices and margins are under pressure, although hurdles are more resistant than other wares.

NEW ENTRANTS

To sustain the workforce at its current level, that is between 600 and 700, requires an annual intake of some 25-30 new recruits annually, each remaining in the industry for a minimum of 20-25 years. It is doubtful whether these levels are at present being achieved. The situation is especially serious in the Kent chestnut industry where numbers of wood-cutters and pale cleavers continue to decline as the older workers retire and younger workers switch to more congenial forms of tree work.

Elsewhere, the demographics are more promising. New entrants are unquestionably fewer than in the early 1990s, but a trickle of young people, mostly in their 20s or early 30s, supplemented by a few early retirees,

continue to enter the industry. Most, however, do not graduate to become full-time craftsmen, due it is claimed to the lack of supervised workplace training and business advice, and difficulty in surviving the first 2-3 winters while building up their client base. The high cost of rural housing is now a major deterrent. The Dorset Coppice Group reports good opportunities and a fair degree of interest, but with very few newcomers staying the course. Surrey and Sussex Coppice Group reports a fair in-flow of young people, many with a good education, but most don't stick it! Owen Jones, the spale basket maker, says that of the hundreds of people who have attended his courses, only two, these in the 1980s and now no longer active, took up his offer to pursue the craft as a career. Trevor Austen, the Kent rake maker has found no successor.

Recruitment holds up far better where supervised training is available. Ben Law (W. Sussex) and Mike Abbott (Herefordshire) have tutored a succession of trainees, most of whom have continued in the industry. A N W Hampshire hurdle maker has just been joined by his son after a spell in Africa. Forest of Avon Products reports a few new faces among its membership. Most astonishing of all, W. Sussex craftsman has been approached by a 16 year old boy wanting training!

Two apprenticeship schemes have recently started, one administered by the Greenwood Trust, the other by The Bill Hogarth Memorial Apprenticeship Trust, both externally funded. Other ongoing developments include (a) the decision by LANTRA to fund the drawing up of a set of National Occupational Standards for the Greenwood trades as a necessary step towards the validation of NVQs and Learning and Skills Council funding support (b) the setting up of joint working party of the Royal Agricultural Society and the Ernest Cook and Headley Trusts to explore ways in which access to craft training might be improved (c) the allocation of £5 million, over a period of 5 years, by the Heritage Lottery Fund in support of workplace training in traditional crafts, including Greenwood. Much of this though is expected to be earmarked for the building crafts, which have the advantage of heavy-weight support from industry organizations, the CITB and NHTB.

The above mentioned initiatives promise to have positive effects on recruitment. In some respects the much more exciting prospect, for the greenwood crafts, is that several older craftsmen have expressed an interest (no more) to take on trainees in order to preserve their craft, for a modest remuneration. Not all newcomers are interested in traditional products however. Some seem to prefer the more creative fields of contemporary designer wares, where they believe the future of the industry lies. Diversification versus specialisation remains a live issue.

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Readers are reminded that my report on traditional rural crafts published by the Countryside Agency last October can now be consulted on the project web-site :- craftsintheenglishcountryside.org.uk