



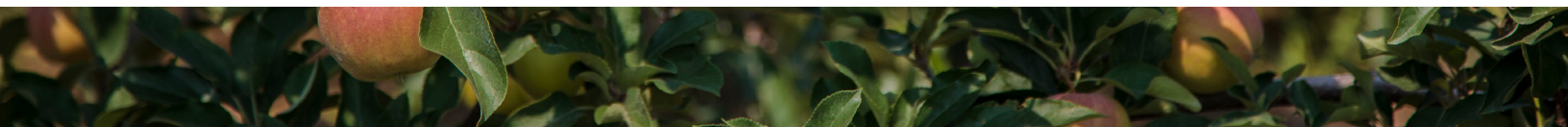
# Wilmot Orchards

One in a series of profiles for the  
Friends of the Greenbelt Foundation



Possibility grows here.

Supporting the long-term viability of farming within the Ontario Greenbelt is a primary objective of the Friends of the Greenbelt Foundation. This profile of Wilmot Orchards is one of a series capturing the business practices and management skills of successful and innovative Greenbelt farmers.





# Wilmot Orchards

## Introduction

Charles and Judi Stevens own and operate Wilmot Orchards near Newcastle, Ontario, producing high quality apples and blueberries. Charles was born and raised on a dairy farm near Bowmanville and entered the orchard business after university. He purchased the current farm in 1975 as a beef operation with 12 acres of fruit trees, some of which were 80 years old. Charles and his father were partners during the first five years of the business and all of the farm's equipment was bought used. Interest rates were high so every spare penny went into paying down debt. Eventually, the farm became a sole proprietorship, then a partnership between Charles and his wife Judi, before ultimately becoming incorporated. Their daughter Courtney currently works in the business helping to manage the on-farm café and leading social media and marketing efforts.

Shortly after buying the farm, Charles and Judi made a commitment to apple production, planting 30 acres of orchard. To generate cash flow while waiting for the trees to enter production, they grew peas and sweet corn for processing and raised beef cattle.

Their next significant decision was made in 1979 when they added blueberry production to the farm. The Stevens opened their Pick-Your-Own blueberry operation in 1983, bringing the consuming public to their farm to purchase 1,000 pounds of blueberries. They now sell in the range of 110,000 pounds of blueberries annually from 22 acres. Once the Pick-Your-Own business had grown and their customer base was established, they pursued the next stage in their business development by opening the on-farm Appleberries Café, serving and retailing a full line of blueberry

## Company Aspirations

Charles and Judi identified that their goals have changed over time. They explain: "When the farm started the objective was to make a living. Then it became growing the business for the future. Today, it is to pass the farm on as a successful business with continued sustainability."

desserts and baked goods. They most recently expanded the café offerings with their branded line of processed blueberry foods; Wilmot Orchards salsa, jams, mustard, syrup, and BBQ sauce.

Apples remain a major crop for Wilmot Orchards, but the Stevens do not market their apples using the Pick-Your-Own approach. Charles stresses apple quality over volume and markets his total crop to a local major apple packer and wholesaler who captures the value in that quality fruit for Wilmot Orchards. When a grower has an established relationship with a multi-market packer the grower payment is based on “pack out”, with larger, higher quality fruit receiving a much better price.

Future growth opportunities for Wilmot Orchards might include further value-added production. The changing cultural makeup of the farm’s customer base could create new options as well. And further exploring the possibilities of social media may be possible. A completely new revenue stream could be built in the hosting of weddings or other events, building on the ambience of the farm. In the near future the 407 Highway will be passing by just north of the farm, potentially enhancing customer exposure, along with the challenges that such expansion would bring.

**Successes**

The Stevens are rightfully proud of the farm business they have created. It is profitable, produces a quality product, satisfies customer expectations, and is well positioned for succession.

Charles states that he considers their farm successful, “Unbelievable in all ways, not just financial.” He adds that the farm has fulfilled his need for a challenge. Farming and growing apples is something he believes in and makes him feel like he is doing something good for mankind. His biggest source of pride is the quality of the fruit produced at Wilmot Orchards. Whereas most apple farmers think of bushels per acre, Charles strives for high quality as his strategy for success.

The Stevens attribute their success to multiple reasons:

- **Knowing where the market is going and what is needed or demanded.**

In the case of their apple production, Wilmot Orchards has been at the forefront of new variety adoption. Key to achieving this are Charles’ exposure to emerging market trends through his participation in several organizations, his close working relationship with his apple marketer, and his willingness to renovate his orchard to more promising varieties when the signals point in that direction.

“ The Stevens could not have achieved their success without attention to production and operational detail.

- **Being an avid adapter of new technology.**

Wilmot was quick to introduce hail cannons and frost fans to protect their crops from Mother Nature when many other producers resisted those advancements. Charles cites a multiple return on investment from those decisions.

- **Hiring for human resource skills.**

Judi stresses that all employees who connect with their Pick-Your-Own customers or café patrons need good personalities and people skills. The Stevens’ focus on positive customer experience is fundamental for a business like theirs to generate repeat sales and word of mouth promotion.

- **Knowing their own abilities, recognizing the strengths of their partners and employees, and hiring out the rest.**

The Wilmot strategy to focus on apple production and place confidence in the buyer of his crop to maximize market returns has proven highly beneficial in terms of fruit quality and financial sustainability.

- **Buying the farm next door to facilitate growth.**

Long term planning has provided the Stevens with growth potential that could have been denied in today's environment of high land prices and strong land acquisition competition.

- **Building the Blueberry Café.**

Charles admits that he opposed it, but they went ahead based on Judi's marketing savvy. Diversifying in this manner capitalized on Judi's skills and background, demonstrating their appreciation for the potential payback on available resources.

- **Building relationships and a team to help make the business a success.**

Employees are key but a successful team includes outside experts like an accountant, investment advisor, lawyer, etc. "You don't build a successful business by yourself."

- **Learning from mistakes.**

"Although some mistakes have been made, they've also provided excellent learning opportunities." Not proceeding with the café earlier was in hindsight an unfortunate deviation from their normal proactive approach. The Stevens are humble people, who readily admit to previous mistakes, although their farm performance reflects few ill impacts from those leanings.

## Current Challenges

In terms of current challenges, Charles contrasts the past and present. He considers that the number one challenge used to be the environment, but today it is the burden of government policy and paperwork. Water taking and disposal restrictions, minimum wage increases, and food safety documentation are the kinds of demands that continue to increase.



Another challenge over the years has been knowing where to make farm investments to achieve the best possible return. Charles experienced this especially vividly in the early days of the farm when capital was very limited. His continual orchard rejuvenation and adoption of weather risk management technologies are examples of his wise, profit-generating investments.

Maintaining a positive work-life balance can be very difficult for business owner-operators, yet considered by management experts as critical to personal health and good decision making. Charles appreciates this but states reflectively that, "Balancing personal life and business is always a struggle when you live on your business." The family cottage provides an escape, more so now that the Wilmot operation is well-established.

## Strategic Focus and Decision-making

The business does not have a documented strategic plan, although long term goals are clearly defined and strategic decisions are based on them. The current strategic issue is farm succession planning. Charles and Judi have settled on what they consider to be the preferred governance model going forward through the eventual succession, but it is not yet written down to inform others involved with the business. They are committed to documenting that model soon.

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The Stevens spend a great deal of time thinking about the long term direction of the business. An example is the decision to rent a neighbouring property for a 25 year term to provide the next generation a better chance of succeeding with the operation.

Charles, Judi, their banker, and their accountant meet annually to discuss business planning. With the support of Growing Forward 2 funding they have recently completed a formal business plan.

Charles is the primary decision maker for the business. Judi makes decisions regarding the blueberry business, and Courtney helps manage the café and leads the social media and marketing efforts.

## Best Management Practices



### Marketing

Wilmot Orchards’ direct-to-consumer marketing efforts are restricted to the blueberry operation and agri-tourism aspects of the business. The apples are sold to a wholesale packer. Their website is attractive, informative and enticing, both with respect to the Pick-Your-Own blueberry operation and the Appleberries Café.

### Financial & Production Management

Besides the normal financial management capabilities of a successful business, Charles identifies the importance of having investments outside the business as this opens up opportunities for succession planning.

Wilmot Orchards pursues innovative practices including crop protection technologies, on-farm production trials conducted with farm input supply firms and on their own, and marketing through the café and their branded blueberry foods line.

### Human Resource Management

The Stevens believe in empowering their employees and treating everyone with respect. They have found it difficult to reach that point consistently but it is a rewarding approach in their view. “A business cannot grow unless employees are empowered on a daily basis. For example, some of the seasonal workers at Wilmot know operational processes and make decisions on their own with the interest of the operation in mind.”

- Charles states that they believe in always giving a person a second chance. This approach may be attributable to the truly generous and caring nature of the Stevens, but it is also consistent with business principles of capitalizing on the investment in employees and empowerment through trust.
- They stress the importance of recognizing the abilities and personalities of farm employees and investing in their further development. As an example, two of the farm employees attended the International Fruit Tree Association conference in Halifax this winter. Other employers would consider the associated costs as an avoidable expense.

### Risk Management

Wilmot employs several risk management practices:

- Liability insurance to address the high public presence on the farm
- A farm food safety plan, akin to an insurance policy
- Investments in crop protection technology to mitigate weather risks

### Outside Advisors and Support

The Stevens could not have achieved their success without attention to production and operational details. But their outreach, awareness of the off-farm environment, and involvement with other organizations and people are perhaps equally important to their growth and business sustainability.

- Outside advisors are consulted – IT specialists, crop protection experts, financial advisors, and OMAFRA staff.
- Charles is very adept at building relationships with people whose perspectives can assist Wilmot Orchards. “Almost everything we have implemented on our farm has been learned from others and adapted.”
- The Stevens share their business plans and value chain development with the apple packer and marketer in their apple operation. “The relationship with the apple packer would not work if there was no sharing of information.”
- Wilmot and Charles personally belong to and participate in several farm and marketing organizations – Ontario Farm Fresh, Durham Farm Fresh, Ontario Fruit & Vegetable Growers Association (Board Director and Committee Chair), Ontario Apple Growers (current chair), and Canadian Horticultural Council (Crop Protection Committee Chair). Charles believes that these leadership contributions to the industry also provide benefits including a broad contextual outlook and a sense of the future.
- Information is sought out globally, particularly with respect to international apple production and marketing, capitalizing on the international marketing experience of the apple packer who markets their crop.

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