

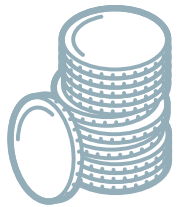
Change programme and strategy 2021–2026

Growing British agriculture and horticulture

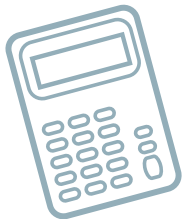


AHDB

Change at a glance



Focus on
cost savings



Modern
levy collection



5-year ballot

Strategy at a glance



Improving **performance**,
profitability and **costs**



Flying the flag for British
produce at home and overseas

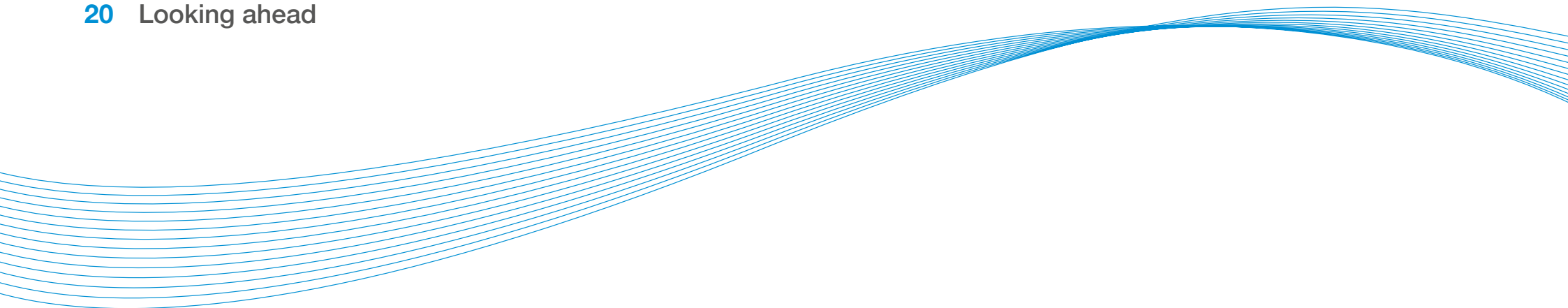


Evidence and data at the
heart of what we do

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Our programme for change

by Chair, Nicholas Saphir

We are embarking on major change at AHDB to improve value for levy payers.

Welcome to the new AHDB strategy, which outlines our plans for the next five years.

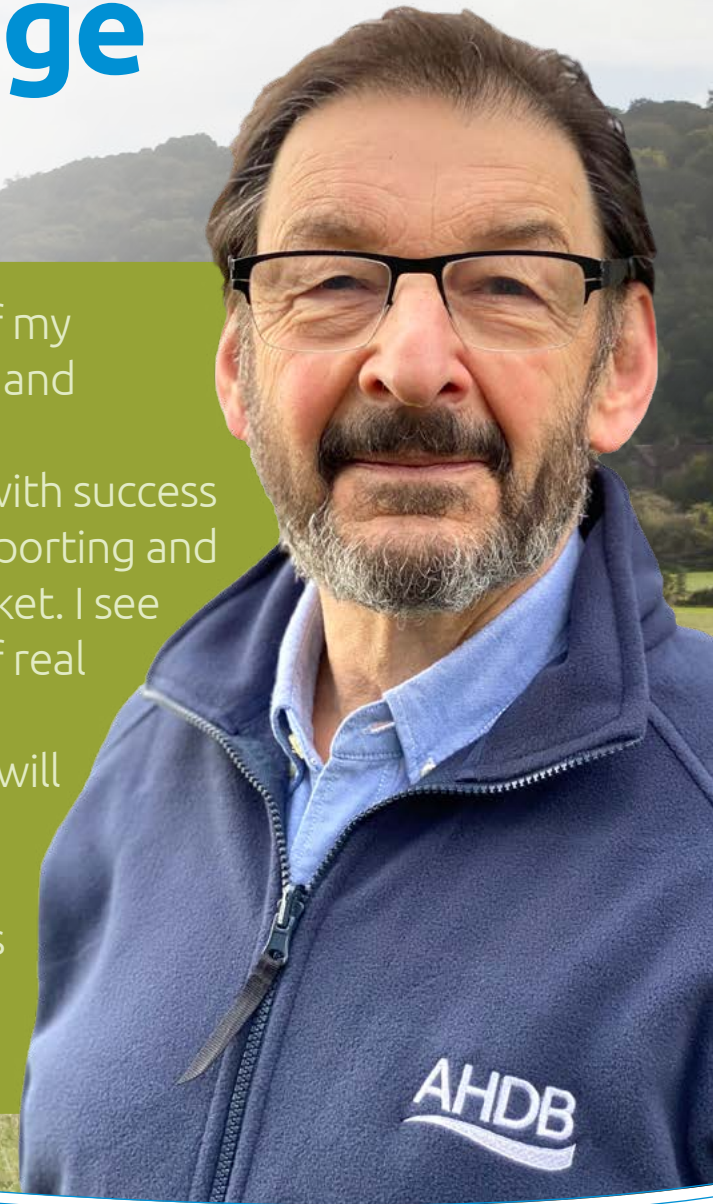
New international trading arrangements, leaving the EU, environmental and sustainability concerns, changes to UK farm and land policy, and significant shifts in consumer behaviour will impact us all. AHDB is committed to change to better support you and your business to meet these challenges.

We're listening

We recognise there are genuine differences between the challenges facing sectors and even within sectors. Levy payers' requirements for research, marketing, exports or analysis are not the same. One size does not fit all and levies must be set to reflect the value provided.

“ I have spent most of my commercial life farming and trading agricultural and horticultural products, with success based on innovation, exporting and developing a home market. I see the future as a period of real opportunity. This AHDB programme for change will provide the basis for us all to work together in taking the opportunities that lie ahead ”

Nicholas Saphir, AHDB Chair



Podcast: Our programme for change

Note: This link takes you to the AHDB website

Against this background, AHDB's strategy lays out how we will improve levy payer engagement, reduce bureaucracy, focus our activities and reduce costs. We will build on our recently published 'Five Commitments':

- **We will communicate regularly on how your levy has been spent and the benefits – engaging with levy payers to determine priorities**
- **We will work with growers and the supply chain to design a modern levy system**
- **We will focus on farm performance, marketing and exports, driven by independent evidence**
- **We will develop a board and advisory structure that reduces both bureaucracy and costs**
- **We will hold a regular ballot on the future of the levy – so you can express your views on the value of AHDB to your business**



Vital role for AHDB to support you

AHDB is here to support your business and sector with key services that can only be resourced collectively.

We will encourage partnership and cooperation throughout the industry, with governments and businesses across the UK, to ensure that levy payers' funding is supported and, where appropriate, matched by others.

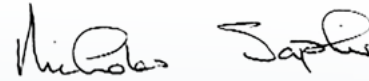
Our work will include:

- **Evidence-based analysis of risks and opportunities**
- **Research partnerships, providing information on pesticides, herbicides and farm inputs to support on-farm performance**
- **Tools and benchmarking services to improve productivity for farmers, growers and advisers**
- **Supporting the reputation of British produce to ensure consumers recognise excellence in terms of value, quality and sustainability**
- **Develop existing export markets and new markets that will be opened up under new trade agreements**
- **Shaping environmental solutions**

Shaping environmental solutions

Important for farmers, growers and the supply chain will be environmental sustainability of British food production driven by policy and consumer needs. AHDB will focus to support the industry in meeting the challenges of environment and climate change. This will include agreed Net Zero carbon targets.

The future of AHDB will be based on your engagement in helping agree the scope of our work, the relevant levy costs for each sector and determining collaborative investment for a profitable future.



Nicholas Saphir
AHDB Chair



We are focused on change

Earlier this year, AHDB outlined its Five Commitments to levy payers in response to the Request for Views published by Defra in spring 2020. This marked the start of a programme of reform to ensure an effective and efficient organisation fit to meet evolving levy-payer needs. This programme includes:



Have your say on the work we do

We are inviting you to join an ongoing conversation with AHDB to have your say on the work we do and where your levy money is spent.

You will be able to engage with us in many ways:

- **A new online service for levy payers to feed back on what they want, review our performance and talk to our technical specialists**
- **A regular opportunity for levy payers to tell us via ballot whether the levy should continue**
- **Join AHDB's new annual meeting each autumn to give us feedback and inform future activity**
- **Join regular sector Open Meetings**
- **Participate in the development of new farmer and grower user groups to shape and design future AHDB programmes**

A new way of setting levy rates

In the future, we will set the levy rate for each crop and/or sector to fund the priorities you determine as levy payers. This means levy rates for each sector may go up or down accordingly.

Modern levy system in horticulture and potatoes

AHDB has listened to the industry, which has asked for changes to the levy mechanism. During 2020 we have been working with horticulture and potato growers to develop and test a range of options for a more modern system.

We welcome greater engagement in setting a levy fit for future needs and agreeing AHDB work programmes. Levy rates will be set based on what levy payers tell us they want done and will vary across different horticulture crop groups.

Details and how to feed back on the areas under consideration can be found at ahdb.org.uk/strategy

Greater transparency in how we operate

We recognise the need to modernise our governance and processes to reduce bureaucracy, improve levy-payer engagement and to deliver what is more relevant to levy-payers' businesses. We will introduce changes to our governance structure, building on sector voices and expertise to better address sector needs.

We will:

- **Involve levy payers more in setting our plans and future levy rates**
- **Reform governance to deliver better value for money, cost control and evaluation of performance**

Following independent advice, detailed proposals are being reviewed, costed, finalised and will be published in early 2021.

We will deliver value for money and cut costs

We need to be more efficient across all parts of the organisation. Our existing services will be reviewed to see if there are other ways in which they can be delivered more efficiently and effectively.

The first step will be to streamline AHDB to deliver savings in staff and support costs.

The second step will be to review our current services, tools and products to see how and where they are used by levy payers and the industry. Where uptake is low, or benefit is limited, these will be stopped.

Finally, we will work with farmers, growers and the supply chain to identify any new priorities that will require future funding to deliver what levy payers want.

We will hold a ballot every five years on the future of the levy

AHDB is committed to a regular ballot every five years as it continues to make the organisation accountable to its levy payers, and ensure they have a say on the future of the levy. The detail around the ballot process is currently under discussion with Defra, which is legally responsible for it.

Sectors will drive our work

Around half of all levy payers pay more than one sector levy. One of the advantages of AHDB as a single organisation is the opportunity it provides through cross-sector programmes to share best practice, drive more impact on farm and achieve economies of scale.

Each AHDB sector will continue to determine how their money is spent to meet its needs. This means there will be a tailored approach for each sector, as set out in the plans included in this document.

Where there are AHDB programmes covering more than one sector – such as the environment, soils or animal welfare – the need for that work will be discussed with each sector before it is funded.

Last year, AHDB generated £7.2M in non-levy income. Moving forward, we will aim to grow funding from non-levy sources.



Key areas of work for 2021–2026

How will we enable British farmers, growers and their supply chains to succeed in a rapidly changing world?

Our key areas of work will be:

- Bringing data, insight and analysis together in an easy-to-use format to help farmers, growers and supply chains make better business decisions
- Helping farming and growing businesses reduce their environmental footprint to meet future policy and consumer needs
- Investing in targeted research to tackle current and future pests, weeds and diseases
- Helping levy payers, industry and researchers share technical information and best practice through our Farm Excellence Network and skills development
- Unlocking and making the most of export opportunities to grow markets for British produce
- Promoting our industry and building the reputation of its products at home and overseas

A group of about ten people, including farmers and experts, are gathered in a green field. They are looking at a document held by one of the men. In the background, another person is working in the field. The sky is blue with some clouds.

Over the next five years, AHDB's work will focus on three areas of **Farm Performance**, **Marketing and Export**, and **Evidence and data**.

Farm performance

We will:

- Build our Farm Excellence Network to 100 Strategic and Monitor Farms to ensure nationwide coverage and a mix of farming and growing enterprises
 - Launch AHDB's Farm 360 Programme - a new, easy accessed package of research, training and latest knowledge to help improve your business and environmental performance. There will be a menu of options to choose from, designed to help your farm business maximise opportunities from new UK support systems and trading arrangements
 - Pump-prime the establishment of the new skills body The Institute for Agriculture and Horticulture to inspire new entrants of all ages, and unlock existing industry talent
 - Work with Defra to create a consistent set of performance indicators for farmers and growers to capture farm business and sustainability data and measure progress over time
- Increase our support for levy payers through targeted research and best practice in disease and pest management, environment, animal health and welfare. This will be alongside existing and new products, tools and services such as:
 - A new cross-sector environmental benchmarking system
 - An electronic medicine hub for the ruminant sector
 - New national systems to improve monitoring and detection of pests and diseases
 - A national beef and sheep genetics platform (this will be dependent on non-levy funding)



“ We have learned that by reducing our cultivation processes, both the number of passes and cultivation depth, we have saved money and become more efficient ”

AHDB Strategic Farmer, Kerr Howatson, Farm Manager at Bruce Farms, Perthshire (Potatoes)



To achieve a sustainable, long-term improvement in farm performance, we aim to strengthen AHDB's position as the UK's leading knowledge exchange partner, disseminating research and innovation at scale across the industry.

We will focus on production efficiency, helping levy payers deliver what consumers want and to the standards they demand. Animal welfare and good environmental management on farm will be central to consumer and trade confidence at home and overseas.

AHDB will work with levy payers and stakeholders to help British farming and growing achieve Net Zero by 2050.

New Farm Review and Development Programme

A new Farm 360 initiative will provide levy payers with a structured and easy-to-access approach to connect with AHDB's knowledge exchange and research. This can start with a Farm 360 Review to measure how farmers and growers are performing from a business, production and environmental point of view, and then signpost

to relevant research and best practice material in the wider Farm 360 Development Programme. This ambitious programme offers an excellent opportunity to work in partnership with others in the industry to drive scale and reach. It will also draw on expertise, innovation and world-leading research from overseas.

Farmer-to-farmer learning

Farmer-to-farmer learning will be driven through an expansion of the AHDB Farm Excellence Network and our ability to capture evidence of what works on farm. Our digital and online offering will be improved to connect more rapidly with farmers and growers in formats that suit them.

A skilled workforce

A skilled workforce underpins excellent farm performance and ensures British farming and growing is fit for the future. AHDB will work with others to bring together the wealth of training, learning and career advice available in a dynamic online space, to help levy payers upskill staff and attract new entrants.

Our ambitions are:

- **Grow our Farm Excellence Network to 100 Strategic and Monitor Farms**
- **Launch the new Farm 360 programme available to all farmers and growers**
- **Levy investment in targeted research and best practice in disease and pest management, animal health and welfare, and the environment**

Marketing and exports

A photograph of a woman and a young girl sitting at a table, smiling and eating. The woman is on the left, wearing a dark top and a red beaded bracelet. The girl is on the right, wearing a pink lace dress and a pink bow in her hair. They are both holding forks and eating from a plate of food that includes rice, meat, and vegetables. The background is a bright window with a view of a city.

Marketing

We will:

- Deliver marketing campaigns on health, nutrition and the environment to drive long-term positive sentiment towards our sectors' products to ensure consumers continue to purchase meat, dairy and potatoes
- Invest in marketing to support sales of British produce in times of crisis
- Inform tomorrow's consumers on how their food is produced through our education partnership with the British Nutrition Foundation

Exports

We will:

- Fly the flag for British produce overseas with staff in key markets, including China
- Make the most of established export markets to grow opportunities for British produce
- Work to secure access to new markets to increase export opportunities
- Explore the potential for a new export brand to communicate the credentials of British produce overseas
- Support UK businesses to export by providing practical 'know-how' and local insights

Our marketing ambitions are, to:

- Champion the reputation of British food and farming, giving the consumer confidence and 'permission to enjoy'
- Promote British produce with best-in-class marketing
- Protect volume and value sales by a 5% increase in positive sentiment from UK consumers towards British food and farming
- Work with retailers and supply chains to ensure our campaigns reach 80% of the target audience



Helping UK consumers make a positive choice

Consumer buying habits at home will continue to change, driven by recessionary behaviour, health concerns and fears around making the right sustainable food choices. In the food service sector, there is a growing risk of price advantage leading to cheaper imported products.

To address these challenges, our marketing work will focus on giving consumers the right information to make a positive choice about what they eat. This will be delivered by promoting evidence-based nutrition and health benefits of British produce alongside the welfare and environmental credentials.

Wherever possible, we will seek to deliver campaigns in partnership with others, building on our successes with Hybu Cig Cymru, Quality Meat Scotland, Red Tractor and Dairy UK.



Learn more about AHDB's marketing activity by going online at ahdb.org.uk/marketing



Building sustainable export markets

AHDB helps build sustainable markets at home and overseas for British produce. New global trading agreements will change both import and export opportunities and relationships. The domestic supply chain needs to be agile and able to respond at pace to these changing market dynamics.

We will continue to provide the central industry resource for supporting the export of our sectors' products, working closely with the supply chain and Government to seek out the best opportunities to drive both volume and value markets. This will be based on AHDB's leading global consumer and market insight.

Insight-driven focus on exports

Export investment will be in three core areas: market evaluation, market support and delivery in country. We will lead a coordinated, insight-driven focus on key markets such as Japan, the US and China through targeted activity and partnership programmes.

Our exports ambitions are, to:

- Maximise international opportunities for British primary produce
- Open five new export markets to a value of £577m
- Grow opportunities in three existing markets to a value of £790m



“ AHDB support on market access and growing international trade is critical to our export business growth ”

Karan Wilson, Export Sales Manager, Karro Food Group



Video: **Exporting Britain to the World**

Note: This link takes you to YouTube

Evidence and data

We will:

- Using Evidence insight and data, create an Evidence Centre that is widely used and valued by the whole industry
- Support improved farm performance by providing clear messages on 'what works' through the launch of the Evidence for Farming initiative
- Identify opportunities for British produce at home and overseas through world-class consumer insight
- Continue to provide the market prices, insight and trend analysis, which is used and trusted by the industry
- In partnership with Defra, deliver the Livestock Information programme and build on the core animal movements data to deliver added value to the industry in areas such as medicine usage and knowledge-based trading
- Facilitate a data-driven industry by working in partnership to create a safe and trusted environment for data sharing
- Using the experience gained with Livestock Information, deliver large-scale data projects, with the potential to bring added value for the industry in other sectors – such as a cereals and oilseeds passport scheme
- Realising the value of AHDB-held data through standardising collection, storage and analysis, mining of existing datasets, opens up our data for the benefit of the whole industry and collaboration with Government sources

Our ambitions are, to:

- Make sense of and drive value from farm data
- Ensure AHDB is seen as the trusted and independent source of evidence, data and analysis
- Launch Evidence for Farming initiative, with a focus on the environment

Identifying risks and opportunities for industry

Evidence lies at the heart of our new strategy. Putting the farmer first, we will champion the practical use of data on farm to drive positive change. Data, analysis and access will become more critical as further change is thrust upon our industry.

Our Evidence Centre will play a key role in the collection and translation of industry data into actionable insights for levy payers, to drive effective, solution-based decision-making. Our involvement in benchmarking on-farm performance is a good example, and this principle will be extended to measuring and improving environmental impact.

Real-time data-informing decisions

It is real-time data that will drive farmer and grower decisions and underpin our industry's reputation. To deliver this, we will, by working in partnership, facilitate a data-driven industry by building a safe and trusted environment for data sharing with the standardisation of metrics. We will also develop data-sharing models that reflect best world-leading practice.

AHDB's market intelligence team has a proven track record for its independent and trusted data, analysis and insight work. Our new Evidence Centre will go beyond this provision of prices and market analysis. Our thought leadership will help levy payers prepare for changes in farm support, policy and increased international competition.



Spotting overseas trade opportunities for you

We will broaden our international focus to interpret what is happening in global markets and identify trade opportunities as they arise. We will provide modelling and forecasting to help farmers, growers and the supply chain plan ahead.

Sharing evidence on 'what works well' on farm

AHDB will also improve the way in which best practice is shared across the industry. We are developing an Evidence for Farming initiative bringing industry research and learning together in one place, to develop clear messages on 'what works well' in an accessible and inclusive format. This was a key recommendation from the Agricultural Productivity Working Group report to better inform the UK's agricultural innovation agenda.

Evidence for Farming will be launched in England as a pilot phase in 2021 focusing on the environment and Net Zero. This will address the current lack of evidence on the impact on business profitability of applying environmental measures.

Working with others



We will seek to work with others where there are aligned common goals around research, knowledge exchange, skills and marketing. This builds on our successful partnerships with organisations such as the British Nutrition Foundation in our education work, Dairy UK in our marketing programmes, and the Betty Lawes Foundation with our Strategic Dairy Farm programme.

Working in this way helps AHDB and its partners achieve greater impact and value for money.

We will also work closely with governments in England, Wales, Scotland and Northern Ireland in delivering new farm support packages and opening export markets. Where appropriate, therefore, we will seek co-funding from Government and others.



How we will measure success

Across the lifetime of AHDB's strategy, two headline measures will inform if we are on the right track:

- **We want to see more levy payers using our services because they find them helpful and beneficial**
- **We will have 70% using our products, tools and services by 2026**



Looking ahead

Over the next five years, British farming and growing is facing a number of common challenges and opportunities across all sectors.

As a levy-funded organisation, AHDB is well placed to perform a vital thought leadership role, provide independent evidence and work with farmers and the supply chain.

THREATS

OPPORTUNITIES

Increasing pressures on farm profitability

Opportunity for all farmers and growers to benefit from best practice through benchmarking and farmer-to-farmer learning

Removal of farm support in England and changing farm policy in Scotland and Wales

A shift in policy towards the delivery of public goods and greater self-reliance for farming and growing enterprises

Greater scrutiny of the environmental impact of horticulture and farming, driven by Government policy and increased consumer concerns

Reducing environmental impact to drive business profitability and build wider consumer confidence

Predominantly producing commodities to supply a fiercely competitive domestic retail market

Data sharing and collaborative working across the supply chain

Increasing pressures on farm profitability

Explore the potential for added value and commodity exports to new markets and developing existing ones

Long-term supply chain impacts from Covid-19 and exiting the European Union

A collective response from industry underpinned by evidence to tackle changing consumer behaviours at home and overseas

Beef & Lamb sector plan

We cannot ignore the significant challenges ahead for beef and lamb. There are tension points around our reputation, major changes to farm policy and direct funding, a volatile global trading environment and the need to become more efficient in a way that creates future resilience.

However, the outlook can be positive for the English beef and sheep sectors at home and overseas. This is being driven by a rising global middle class, consumers who love the taste and nutritional benefits of red meat, and more opportunities in valuable markets.

Over the next five years, everything needs to be focused on reputation, both with consumers, and far more commitment to the progress and adaptations required on farm to create a profitable and environmentally sustainable sector, able to make bold, proud reputational claims.

The challenges are:

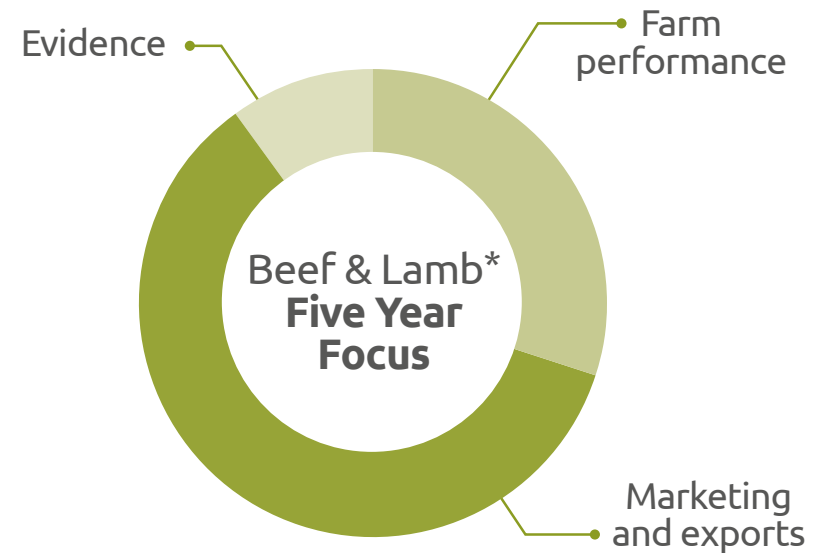
- **How do we make the most of the opportunities and prepare for the impacts of leaving the European Union? Key to this are changing global trade patterns and adapting to a new landscape of farm support**
- **How do we work together on farm performance to ensure farm profitability and productivity underpins delivery on key areas of reputation?**
- **How do we work together to drive exports, and better communicate our credentials around domestic reputation to ensure consumers continue to enjoy British beef and lamb?**

Growing our markets at home and overseas

- We will focus our consumer marketing campaigns towards driving a longer-term positive shift in consumer attitudes towards beef and lamb, to underpin a thriving market at home. This will be done by communicating the positive health benefits of red meat and demonstrating how the English beef and lamb sector will track and continually improve its environmental record
- We will continue to use the Industry Reputation Working Group to bring farmers, processors and industry organisations together, to develop, share and fund activities that can be used by all in strengthening the confidence of consumers that purchasing beef and lamb is a positive choice



- We will continue to build on our international export activity. This has seen us partner with Government, veterinary experts and processors to open up market access for beef and lamb in countries such as the US, China and Japan. Growing markets in this way helps support domestic farmgate prices
- Using our latest global consumer and market insight, we will continue to support existing market opportunities for beef and lamb in Europe and Asia. We will do this through having specialist staff on the ground in key markets, providing expertise and support



*Beef and lamb in England only

Improving farm performance

- To truly support our industry in achieving strong reputational credentials requires focus on the greatest impacts. We will narrow the areas of our research and on-farm delivery programme and specialise in those areas that are vital to support the wider reputation of beef and lamb. These are genetics, enhanced animal health to reduce antibiotic usage, and the environment (including soil and grassland management)
- In partnership with others in the sector, we will expand our network of Strategic and Monitor Farms. Increasing this network will help farmers share best practice in better business planning and improving their environmental footprint. This will be done through providing a tool to track performance in key areas, to help farmers improve their profitability and underpin the reputation of red meat



“The farm visits have opened my mind to new ideas and have allowed me to discuss issues with like-minded people. I can now see deficiencies in my own system that I wasn't aware of before, and its made me look objectively at every aspect of my business ”

**Nick Keenlyside, Grassland Discussion Group
Host Farm, Newcastle**



“We have found being part of the Strategic Farm programme has helped us to focus on key parts of our business and has encouraged us to look at our figures more regularly ”

Louise and Chris Elkington, AHDB Strategic Farm, Grantham, Lincs

- We will continue to support the Livestock Information Service (LIS) to ensure a quicker, convenient, and more practical way for farmers and the supply chain to record animal movement data. LIS will help the sector to better manage and respond to disease outbreaks, as well as providing a system with added value in longer-term areas such as recording animal medicine usage and bringing together national data to power genetic improvements
- We will continue to support the industry's BVDFree initiative in England to eradicate this costly disease from British herds

Cereals & Oilseeds sector plan

Looking ahead, the UK cereals and oilseeds market is expected to show great volatility as it continues to be subjected to the pressures of new Brexit impacts on imports and exports, changing weather patterns, and increased susceptibility to pests and diseases. However, there is the positive of a continuing strong domestic market. To maintain their productivity and competitive advantage, farmers will have to manage several challenges.

We will build on our investment in areas such as the Recommended Lists, Farmbench, soils research, and the AHDB Nutrient Management Guide (RB209), to deliver information in a tailored way to reflect individual farm situations.

The challenges are:

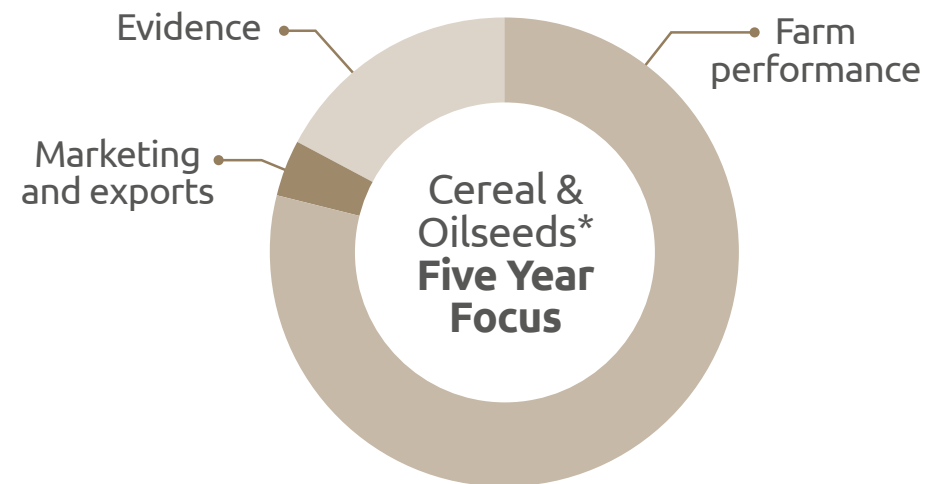
- **How can we remain financially viable as the current reduction in payment support is only partly offset by the Environmental Land Management Scheme?**
- **With less chemistry available, how do we maintain crop quality and tackle weed, pest and disease pressures with greater adoption of Integrated Pest Management (IPM)?**
- **How can meeting Net Zero ambitions for the environment be achieved in a profitable manner in supply chains?**
- **How can the industry attract and retain the right level of skilled staff for the future?**
- **How do we maintain our industry reputation to ensure the consumer continues to purchase UK products?**

Managing pest and disease threats through greater use of IPM

- We will pull together in one place all the knowledge we can find globally on IPM for controlling pests and diseases, to help reduce reliance on chemical pesticides, and ensure good access to it for growers and advisers
- We will set up a scheme to meet our ambition to widely monitor the incidence of pests and diseases in the UK to inform our strategy and provide real-time data to growers and advisers
- We will find ways to integrate data on pests and diseases from different sources into a simple format that can then be used to aid decision-making on farm



- We will find ways to help growers overcome their barriers to using IPM including how to manage the risk of reducing their dependence on chemical pesticides
- Using our Prevent, Detect, Control approach, we will risk assess and prioritise key pests and diseases and identify solutions and tools to accompany them – such as the recently released Barley Yellow Dwarf Virus management tool
- Through our network of Strategic Cereal Farms, we will run field-scale trials of the latest research from the UK and overseas, to assess how it can practically help farmers reduce their reliance on chemical pesticides
- We will deliver a structured programme of on-farm activities to share how farmers can reduce their reliance on chemistry through better use of data. This will include our Recommended List, Nutrient Management Guide, fungicide performance and soils data, as well as rotations, cover crops and biopesticides



*Cereals and Oilseeds in the United Kingdom

Improving business profitability for farmers and processors

- We will continue to deliver world-class market intelligence and analysis to help farmers and supply chains navigate their way through changing trade patterns
- We will use our Farmbench data to help identify which farm business areas drive the greatest profitability, and share that knowledge with farmers through an expanding network of Monitor Farms and discussion groups. These will be delivered in partnership with others in the industry. In the future, we will also help growers to meet the requirements for ELMs payments
- We will look at the marketing options farmers have to sell their grain and provide easy-to-use tools to help them make better decisions
- We will focus on skills and Continuing Professional Development (CPD) for farmers and their staff. This will help deliver the skills needed to support a modern and forward-looking workforce. To do this, we will partner with others in the industry including the new Institute for Agriculture and Horticulture
- Working with the industry, we will revisit options for a digital grain passport system to save time, improve product traceability and collect data to drive a profitable industry

- We will monitor the reputation of UK grain and oilseeds production to ensure that it competes favourably with imports on non-cost issues
- We will develop ways for growers and the industry to meet their Net Zero carbon ambitions



“ Being the first Northern Ireland Monitor Farm has been very important in accessing new tools and services such as AHDB Farmbench. It's helped our group to look more closely at our costs and margins, while challenging each other to think differently ”

Richard Orr, Monitor Farmer, Meadow Farm, Downpatrick



Dairy sector plan

Rising global populations and changing diets mean the long-term prospects for British dairy remain bright.

However, there are a number of challenges ahead for the British dairy sector.

Over the next five years, we will invest in two main areas, seeking out opportunities to work with others in Britain and overseas.

We are committed to building on our partnership working with organisations such as Dairy UK, the Welsh Government and the Betty Lawes Foundation to make the best use of funding, skills and resources for levy payers.

The challenges are:

- **How do we track and address rapidly changing consumer perceptions of dairy and what they buy?**
- **How do we reduce the environmental impact of the dairy sector?**
- **How can we strengthen supply chain relationships to take advantage of new global trading arrangements?**
- **How can all dairy farmers have the opportunity to benefit from sharing best practice?**

Improving farm performance

- To enable farmers to experience face-to-face sharing of best practice across all dairy systems, we will maintain our successful Strategic Farm network at a rolling programme of 25 farms across Britain. We will also increase the reach of these farm programmes by delivering them online to give farmers more choice in how and when they can access information
- We will roll out practical tools and services in genetics and genomics, grassland productivity, and animal health and welfare to ensure our research is tailored as far as possible to individual farm situations



“It’s great to be part of the network working to both improve our own productivity, and through events on the farm, to get feedback and learn from other farmers experiencing similar issues”

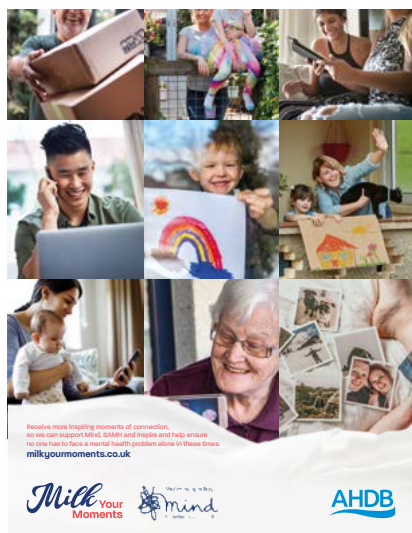
Arthur Owen, Bodysgaw Isa, Conwy



“We are passionate and proud of what we do. We are open and honest and not afraid to share our journey so far to help others and also to learn more from fellow farmers and professionals in the industry”

Karen Halton, Chance Hall Farm, Halton Farms Ltd., Cheshire

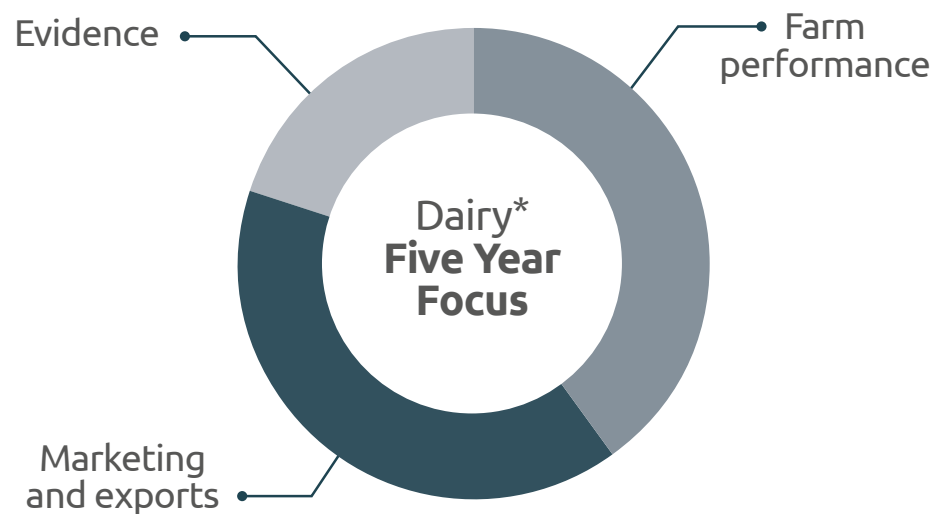
- Our benchmarking programme will be expanded to include environmental performance, to help farmers better manage the changes ahead in farm support. This will also help improve consumer confidence in the dairy sector
- We will work with others across the industry to accelerate the pace of progress on endemic diseases such as lameness and mastitis. We will also continue to support Livestock Information to ensure a quicker, more convenient and practical way for farmers and the supply chain to record animal movement data



Protecting and promoting the reputation of dairy with consumers

We will work with processors, retailers and the wider supply chain to develop the following:

- Evidence-based marketing campaigns focused on encouraging target groups of consumers to change their views on dairy products and consume more of them
- Consumer communications that clearly show how the dairy sector is focused on improving its reputation in areas such as the environment, bull calves and handling of stock. This will be based on evidence gained from our farm performance work
- An exports programme that continues to explore new overseas markets for British dairy to grow the value and volume of product



*Dairy in Great Britain

Horticulture sector plan

The outlook for horticulture businesses in Britain remains challenging over the next five years, with pressure on margins and resources and an increasingly competitive environment. There are common challenges faced by growers which need to be tackled regardless of their crop, such as a shortage of skilled labour.

Across all of these challenges, we will ensure issues are identified, the necessary research is commissioned and solutions delivered effectively, to meet the very specific needs of individual crops.

Since 2014, we have invested £30m in research. We will continue to be Britain's biggest funder of applied research, enabling all horticulture levy payers to benefit from the latest knowledge and best practice.

The challenges are:

- **With the prospect of fewer plant protection products, how can we help identify management tools for existing and emerging pest, weed and disease threats?**
- **How can growers manage their business with increasing staff costs and a shortage of skilled labour?**
- **How can the sector best manage resources to minimise environmental impacts and maximise benefits?**



“ AHDB remains uniquely placed to provide support for the horticulture industry during these turbulent times. Critical to the sector are AHDB’s plans to expand their work on crop protection, specifically the Extension of Authorisation for Minor Use (EAMUs) and IPM programmes ”

**Keston Williams, Technical Director,
Barfoots Ltd.**

- We will invest in Integrated Pest Management (IPM), working to coordinate industry data and insight to develop early warning systems and improve control strategies for diseases, weeds and pests. We will also develop tracking and monitoring programmes to help growers anticipate and manage threats such as Spotted Wing Drosophila and Tomato Brown Rugose Fruit Virus in a way that saves both time and money

Labour shortages

- We will help growers get the best out of their workforce through expanding and developing our pioneering SmartHort programme, concentrating on Lean Management principles to help businesses identify where time and effort is going to waste and where staff costs, time and efficiencies could be improved
- By bringing together growers, scientists and technologists, we will increase the uptake of robotics and automation in the horticulture sector. This will help ensure innovation is practical and cost-effective, enabling businesses to make the best use of available labour



Crop protection

- Working with the industry, agrochemical manufacturers, regulators, and national and international grower groups, we will develop and expand our programme of plant protection product approvals. This will focus on Extension of Authorisation for Minor Use (EAMUs) and emergency approvals to ensure British growers continue to have access to essential crop protection products
- We will continue to invest in plant protection product evaluation and support the pipeline of new valuable products for growers

Environment

- We will support the industry's move to Net Zero through investment in the GrowSave knowledge exchange programme, focused on solutions to understand changing legislation and incentives, and deploy environmental control strategies

“ We rely on AHDB to help fight the removal of certain chemicals, as well as to fight for the equal right to use chemicals that are also used in EU countries. The EAMU scheme helps the UK industry stay profitable and legal ”

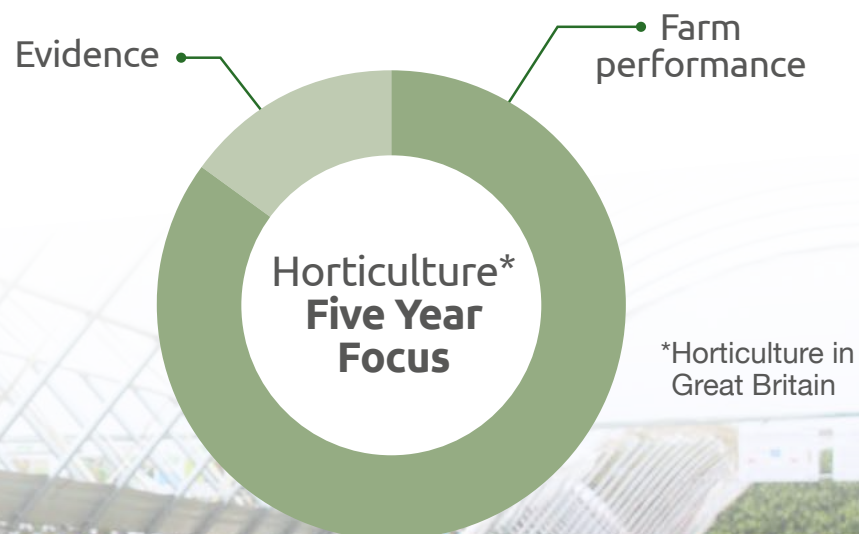
James Broekhuizen, Anchor Nurseries, West Yorkshire



- Through funding programmes such as GREATsoils, the AHDB Nutrient Management Guide (RB209) and the Water Efficient Technologies Centre, growers can both see and access best practice in resource-use efficiency, soil management and water use. This will help businesses both meet new environmental policy requirements and respond to the challenges of a changing climate

Industry insight

- Where there is demand from a sector, we will provide data, insight and services to maximise British horticulture's market potential



Pork sector plan

The English pig sector has adapted quickly to make the most of changing global trade patterns, exporting to over 97 countries worldwide. It has also responded positively to shifting consumer trends. However, there is still significant work ahead.

Over the next five years, we will continue to help producers adopt on-farm innovation and best practice through our existing network of Pig Clubs and Strategic and Monitor Farms. This will be supported through our website, podcasts and digital tools, and a strong line-up of online support.

In addition, we will focus on the following two priority areas:

- Growing markets overseas
- Protecting and promoting the reputation of pork at home

The challenges are:

- How can we sell every part of the pig for the best return at home or overseas?
- How do we continue to protect the reputation of pork and promote its benefits to consumers?
- How do we continue to improve animal health and welfare, and reduce our impact on the environment?
- How can we improve production efficiency in a way that supports the reputation of British Pork, while remaining competitive at home and overseas?

“ Measure, record, analyse – that is what the electronic medicines book does. eMB is held up as a fantastic example of what a sector can achieve when everyone pulls together, and we can demonstrate the incredible progress the pig sector has made, and will continue to make over future years ”

Simon Watchorn, pig producer, Suffolk



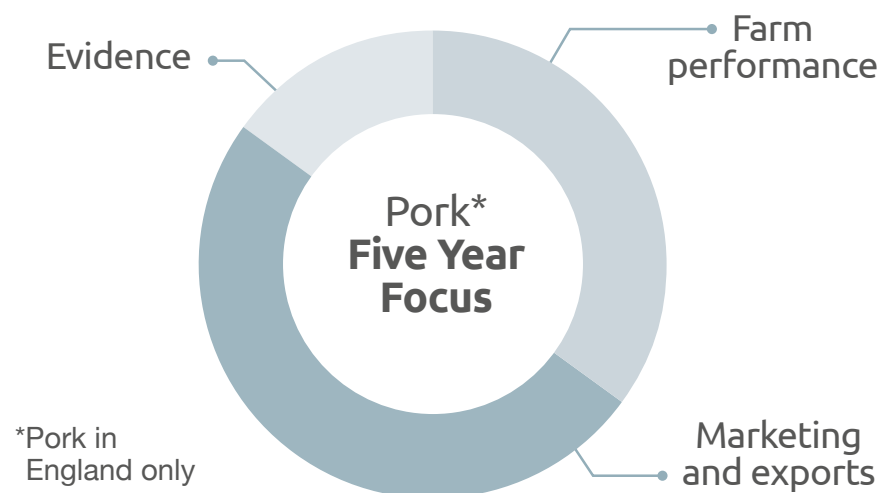
Growing markets overseas

- We will continue to lead on market access to countries such as Vietnam, partnering with processors, stakeholders and Government
- We will continue to grow high-value markets such as Hong Kong and high-volume markets such as China. We will do this through having specialist staff on the ground in key markets, providing expertise and support. Growing markets overseas provides greater opportunities for carcase balance, which helps support domestic farmgate prices

Protecting and promoting the reputation of pork at home

- We will ensure consumers continue to have confidence in British pig production standards by funding activities such as the electronic medicines book (eMB) to track antibiotic use, the Pig Health Scheme, disease surveillance and the Real Welfare Scheme
- Using our world-class consumer insight, we will deliver high-profile, targeted pork marketing campaigns, to meet consumer needs for health, nutrition, taste and convenience. This will help ensure pork remains a positive choice for consumers

- We will give consumers the latest information on the nutritional value of pork and the important role it plays in a healthy balanced diet
- We will build on the example of the eMB to create a similar system on behalf of the industry to collect data on environmental performance. This will show consumers and policymakers the pig sector is committed to tracking and improving its impact on the environment



Potatoes sector plan

The long-term prospects for the British potatoes sector are mixed. Consumers are returning to potatoes as a staple food in times of recession, while the industry faces uncertain trading conditions as we leave the European Union and the loss of available crop protection products. Growers and the supply chain need to come together to address common challenges.

Over the next five years, we will invest in three priority areas to help address these:

- Potato storage
- Crop protection
- Protection and promotion: a great food for everyone

The challenges are:

- **How do we achieve sustainable crop storage?**
- **How do we survive a transition away from conventional crop protection?**
- **How can we ensure the positive credentials of potatoes are understood by consumers?**
- **How do we ensure the immediate and longer-term financial sustainability of the industry?**



“ It’s the field trials that we learn from the most. AHDB’s Knowledge Exchange Managers are highly experienced and offer practical advice and support to help us trial different methods to address the key challenges we are faced with, such as the loss of diquat, and help us improve the way we farm ”

Jim Reid (left), Strategic Potato Farm Host, Milton of Mathers, Angus (Scotland)

Potato storage

- We invest £500,000 per year in storage research. We will increase this investment, working to identify alternatives to chlorpropham (CIPC) for the fresh and processing sectors
- We will build on our new Storage Network service providing one-to-one practical advice, tailored to a grower’s own storage operations. This will be supported by our Stewardship Programme on store cleaning and removal of CIPC residue, to ensure growers can make the most of their storage facilities
- Our work on variety dormancy rankings will support storage management decisions, with information available via our online Storage Hub
- Through our network of Strategic Potato Farms (SPot), growers will be able to access field-based solutions to improve potato storability and share best practice

Crop protection

- We will continue tracking and monitoring programmes such as Fight Against Blight and Aphid Alerts, to help growers prepare for and manage potential losses in crop protection. We will also speed up the process of testing and bringing new approaches to market, so growers are better equipped to manage pest, weed and diseases
- We will help growers to find practical and cost-effective alternatives to disappearing chemistry. This will include practical field trials, similar to the ones we have run on desiccation, providing guidance on haulm destruction without diquat
- Growers will be able to access advice, best practice and insight on crop protection via our website, podcasts and SPot Farm network, enabling them to make informed business decisions. Our benchmarking tool, Farmbench, along with new environmental programmes, will better support financial assessment of adopting new sustainable practices

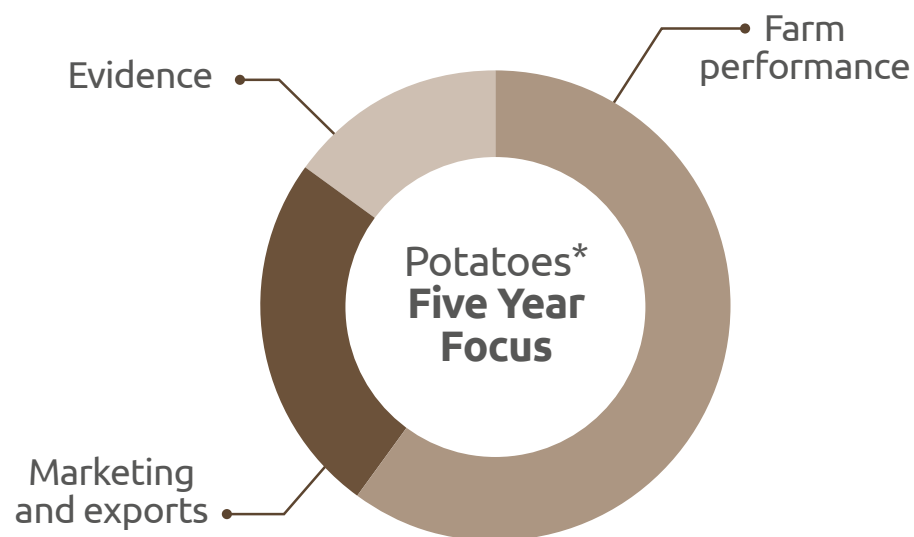


“ AHDB’s storage research has been crucial in equipping McCain and our producers to make vital changes to how we manage crops and sprouting in store. With further challenges ahead, storage research and delivery via knowledge exchange will remain key to delivering a vibrant and sustainable potato sector in Britain ”

Daniel Metherringham, Director of Agriculture, McCain Foods

Protection and promotion: a great food for everyone

- Using our world-class consumer insight and analysis, we will help the supply chain maximise market opportunities for potatoes
- We will provide evidence-based information to consumers on the role of potatoes in a healthy balanced diet, working through our Food Advisory Board, an independent panel of health and nutrition experts
- Our three-year marketing campaign with Bord Bia saw a 14% increase in the number of consumers who saw potatoes as healthy. Marketing campaigns and activities to promote the benefits of potatoes will be undertaken as and when needed. This will be informed by the latest evidence and insight, and delivered in partnership with the industry
- We will identify and promote the potato industry’s contribution to Net Zero targets using cross-sector tools



*Potatoes in Great Britain

How to feed back

You are welcome to join our series of sector-focused town hall meetings on our strategy, running from December to January 2021. This is your opportunity to ask questions on the strategy and feed back on your sector's plan.

- **14 December to 28 January – Horticulture**
- **7 January 2021 – Dairy, Pork, Potatoes**
- **13 January 2021 – Beef & Lamb**
- **15 January 2021 – Cereals & Oilseeds**

For more information on AHDB's strategy and to register for a town hall meeting, visit ahdb.org.uk/strategy

To feed back on the AHDB strategy, visit ahdb.org.uk/strategyfeedback or email strategy2021@ahdb.org.uk

Alternatively, write to: AHDB Strategy Feedback, AHDB, Stoneleigh Park, Kenilworth, Warwickshire CV8 2TL



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