



Agriculture & Horticulture
DEVELOPMENT BOARD

AHDB Corporate Plan 2014/17

To make our agriculture and horticulture industries more competitive and sustainable

April 2014

AHDB



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About AHDB

The Agriculture and Horticulture Development Board (AHDB) is a Non-Departmental Public Body, funded by farmers, growers and others in the supply chain through statutory levies (a parafiscal tax). It is sponsored by the Department for Environment, Food and Rural Affairs, the Welsh Government, the Scottish Government and the Department of Agriculture and Rural Development Northern Ireland.

AHDB purpose

AHDB's purpose is **to make our agriculture and horticulture industries more competitive and sustainable** through factual, evidence-based advice, information and activity.

What we do to achieve our purpose

- We deliver extensive **research and development** programmes which are delivering scientifically-robust and commercially useful outcomes for our levy payers
- We undertake efficient **farm-level knowledge transfer** programmes based on evidence both from third party science and our own R&D aimed at improving efficiency, productivity and sustainability
- We provide unbiased, high quality **market information** that helps business decision making and improves supply chain transparency
- We carry out **export market development** work and also domestic marketing activity to **inspire and inform consumers** in order to assist the economic viability of sectors which require this
- We raise awareness among **school children** of food and where it comes from, we also help ensure the agriculture and horticulture industries are able to develop and attract workers with the **skills** needed to operate effectively
- We also ensure that proper **account is taken of Government priorities** for agriculture and the agri-food industry, where appropriate.

Our expertise

We are defined by our people and effective delivery and support to our levy payers is down to us having the right people in the right roles. This is enhanced through our programme of investment in the development of the expertise, knowledge and professionalism of our people.

Who benefits from our work

Levy payers are at the heart of what we do. Our delivery of business support services to them is focused through six branded operating divisions:

- Pig meat in England – through our **BPEX** division
- Milk in Great Britain (GB) – through our **DairyCo** division
- Beef and lamb in England – through our **EBLEX** division
- Commercial horticulture in GB – through our **HDC** division
- Cereals and oilseeds in the UK – through our **HGCA** division
- Potatoes in GB – through our **Potato Council** division.

Additional background on AHDB can be found on its website: www.ahdb.org.uk

Introduction to the plan

This Corporate Plan captures the strategic priorities and commitments for the Agriculture and Horticulture Development Board for the three-year period April 2014 to March 2017.

Our philosophy is that levy payers are at the heart of what we do. In order to deliver genuine levy payer focus there is a sector advisory committee (known as 'sector board') for each of the six commodity sectors represented by AHDB. Each sector board comprises levy payers, other stakeholders from the sector and independent members. These boards help us to develop the most appropriate strategies to meet the challenges faced in each sector; they also help us to deliver good levy payer accountability.

Our six divisional business plans sit behind this Corporate Plan and give the detail on what will be done to deliver the strategic priorities in this Plan. These divisional business plans are published on www.ahdb.org.uk/publications/consultation.aspx.

In developing the six divisional business plans we have staged robust strategic discussions within sector boards, advisory committees and panels. We have also drawn on discussions with, and feedback from, levy payers on priorities and performance.

Our work is predominantly funded from the Agriculture and Horticulture Development Board levies (see page 10 for the recommended levy rates for 2014/15) which are ring-fenced to be used for the benefit of levy payers in the sector from where they are collected.

This Plan benefits from a consultation period with AHDB stakeholders, whose comments and observations have been taken into account. The target outcomes contained in the Plan are reported on in the relevant AHDB Annual Report and Accounts, published in July each year.

Corporate Plan timetable

The process that is followed to finalise this AHDB Corporate Plan is laid out below:

DATE	ACTION
29 November 2013 to 16 January 2014	Stakeholder Consultation – Draft plan, recommended levy rates and provisional budget put out for consultation with industry stakeholders.
3 February 2014	AHDB Board Meeting considers and agrees an amended draft taking into account the industry feedback. The Board also signs off the levy rates to be recommended to Ministers.
February to March 2014	Ministerial Approval – Draft plan and recommended levy rates for 2013/14 approved by UK Ministers.
25 March 2014	AHDB Board Meeting – Board agrees final budget for 2014/15.
1 April 2014	Publication – AHDB Corporate Plan published on AHDB website.

Some key achievements

- AHDB helped to develop the Government/industry Export Action Plan and also delivered UK access to new export markets including the Russian market for lamb, the Australian market for pork, the Vietnamese market for seed potatoes and the Moroccan market for feed wheat – bringing the value of British beef, pork, lamb, seed potato and wheat exports to 5.5bn in 2013. Exports help to underpin domestic farm gate prices.
- AHDB has led the industry in defining a new Industry AgriSkills Strategy. It was launched at a Skills Summit in London on 6 November 2013 by a Defra Minister and paves the way for greater workforce skills development and industry professionalism, which is a key component for continuous improvements in our industry competitiveness and, as such, for the successful implementation of the Government's Agri-Tech Strategy.
- During 2013 AHDB was been a lead partner in the report *Feeding the Future – Innovation Requirements for Primary Food Production in the UK to 2030*. It sets out, for the first time, what should be the industry's main research and development focus over the next two decades and helped to shape the Government's Agri-Tech Strategy.
- A Common Agricultural Policy (CAP) Reform scenario analysis by the Market Intelligence team highlighted the possibility for distortion of competition across the EU and even within the UK. This was widely circulated to farming unions, other industry stakeholders, the Government and Devolved Administrations to assist in their decision making during the negotiation phase.
- AHDB is at the forefront of educating our schoolchildren about food and farming and during the last two years has been facilitating better co-ordination of food and farming activity and messages in the education sector through a series of round table meetings with nineteen agricultural stakeholder organisations active in the education sector. The result is that more is being achieved for no extra cost.
- More than £3m in research funding has been sourced from BBSRC during 2013 via the Horticulture and Potato Initiative (HAPI) to support four key projects focused on research to increase marketable yields for the British potato and horticulture sectors.
- AHDB's £1.5m annual PhD Studentship programme supports 15-20 new projects per year. Each lasts for around three years meaning there are around 50-60 running at any one time delivering specific new scientific studies for the industry as well as supporting the succession of relevant technically-able people into research and the industry.
- We have helped develop and introduce Isotope traceability (SIRA – Stable Isotope Reference Analysis) to be able to test probability of retail pork labelled British, being British, as part of assurance for pork. This was rolled out in 2013 as a commercially viable tool for supply chains to use.
- An electronic Grain (eGrain) passport system was devised in 2013 and is now in pilot stage with five companies to test the concept in fast-moving and complex commercial situations. The pilot will help the industry establish the real costs and benefits in adopting an electronic passport and if it will also help with the smoother flow of two way information between farmers, merchants and processors.

AHDB strategic priorities and commitments

Analysis of the challenges

In our autumn 2013 planning process, we have considered the key challenges and opportunities facing the UK agriculture and horticulture industry through a detailed PESTLE analysis process (Political, Economic, Sociological, Technological, Legislative and Environmental). For each factor considered, we looked at the potential impact and, given that the six commodity sectors we work with are affected by the factors to varying extents, we ranked each (High, Medium or Low), for the effect on each sector. A copy of the PESTLE analysis can be found in the corporate plan section of the AHDB website: <http://www.ahdb.org.uk/publications/corporate.aspx>

The PESTLE challenges have then been considered in the light of:

- (i) the relatively limited levy resources available with which to address them
- (ii) the individual industry sector priorities
- (iii) the degree to which any AHDB levy-funded intervention could produce a tangible benefit for levy payers.

Not all the issues highlighted in the PESTLE are therefore addressed within the Plan.

AHDB strategic priorities emerging from the PESTLE analysis process

The AHDB Board has identified five core priorities which this Corporate Plan, as well as the divisional sector plans, are structured to deliver to levy payers in order to help them:

- **To improve productivity and cost management (resource management, climate change, soils and water, managing market volatility)**
- **To prevent and manage disease**
- **To deliver market development (export development, promoting quality products to differentiate against imports, market information and analysis)**
- **To understand and adapt to the regulatory and policy environment**
- **To address labour market issues and skills development.**

AHDB commitments

To improve productivity and cost management (resource management, climate change, soils and water, managing market volatility)

- Commercial outcomes: We will deliver scientifically-robust and commercially useful outcomes for our levy payers through carefully targeted and efficient knowledge transfer programmes based on evidence both from third party science and/or our own targeted R&D.
- Increase sustainability: We will help the industry to increase sustainability through: reducing costs, increasing yields sustainably, improving quality and optimising use of inputs.
- Benchmarking costs: We will encourage the use of benchmarking to help levy payers identify areas for business improvement.
- Environmental roadmaps: We will further develop and help implement sector-focused industry roadmaps in partnership with other organisations. These take stock of the current position and set targets for improvement focussed on: water, soils, fertilisers, pesticides, waste and greenhouse gas emissions – helping to meet the challenging targets laid out by the Committee on Climate Change as well as those in the revised EU Thematic Strategy for Air and the Water Framework Directive.
- Price volatility: We will encourage best practice in price risk management for farm businesses.

To prevent and manage disease

- Endemic and exotic disease risk: We will help pig, sheep and beef/dairy cattle producers maximise herd health through best practice management of endemic and exotic disease risk.
- Responsible antibiotic use: We will advocate the responsible use of veterinary medicines through the Responsible Use of Medicines in Agriculture (RUMA) alliance.
- Crop protection: We will help find ways to mitigate the potential shortfall of crop protection solutions as a consequence of the impact of key elements of the EU Pesticides Thematic Strategy, in particular the Sustainable Use Directive (implemented December 2011) and the Plant Protection Products Regulation (implemented June 2011).

To deliver market development (export development, promoting and differentiating assured quality products, market information and analysis)

- Exports: We will continue to drive export market access and development work for the beef, sheep meat, pig meat, seed potato and cereals sectors. This is to help balance domestic supply and demand, to also find higher paying markets for products such as red meat offals which have little or no value in the home market and to underpin domestic farm gate prices. As part of this we will help fund a dedicated official post in China to open up the market opportunities for British produce.
- Trade development: We will undertake trade development and marketing activity to help supply chains to find ways to add additional value to commodity product and to compete effectively against import penetration.

- Business intelligence: We will give levy payers and the wider industry access to unbiased, high quality market information and intelligence to improve supply chain transparency and to assist business decision making.
- Food awareness: We will make more effective the existing school education initiatives delivered by AHDB and others in the industry, aimed at raising awareness of food and where it comes from, by leading and facilitating joint industry working on school education initiatives.

To help levy payers understand and respond to the regulatory and policy environment

- Regulatory support: We will assist levy payers with technical advice in matters of compliance with environmental regulations and other legislative challenges. These include compliance issues around crop/plant protection products, animal health and welfare, the Industrial Emissions Directive, the Water Framework Directive and the Nitrates Directive.
- Evidence to governments: We will monitor, interpret and where necessary seek to inform and provide expert advice to Government Agencies, civil servants and politicians about the facts on issues facing the industry to ensure they have a solid understanding to help inform their decision-making and avoid unintended outcomes.

To address labour market issues and skills development

- Industry Skills: We will drive forward the new industry [AgriSkills Strategy](#) (launched on 6 November 2013) and facilitate greater partnership working across the industry to help deliver improved workforce skills and greater professionalism.
- Research and technical skills: We will support succession of relevant technically-able people in research and industry through the funding of PhD studentships, postdoctoral fellowships and summer school undergraduate placements.

In addition, the Board will continue to drive value for money within AHDB and communicate our work to levy payers

- Seek out cost savings: We will continue to seek out ways to improve the cost-efficiency of AHDB operations through procurement savings, further streamlining of processes and monitoring of board/committee/panel costs.
- Grant funding: We will take every opportunity to secure additional funding by aligning with the UK Strategy for Agricultural Technologies and EU Framework 8 (Horizon 2020) objectives funding where appropriate whilst continuing to address sector and cross-sector priorities through close participation with the Technology Strategy Board and BBSRC.
- Joint working: We will continue to nurture more joint-sector projects within AHDB by better forward planning and strive to secure non-levy co-funding across a wider range of activities through extended partnership/collaborative working.
- Keep levy payers informed and listen to feedback: We will continue to work together to listen and respond to levy payer feedback, to communicate the purpose of and outcomes from all our projects and programmes and to demonstrate value for the levy funds invested.
- Branding: We will look at creating a simplified family of brands to make it easier for levy payers and other stakeholders to identify levy-funded activity.

Measuring progress

We will measure progress across the priority areas through the sector specific key performance indicators in our six divisional business plans. (these can be found on the AHDB website at: www.ahdb.org.uk/publications/consultation.aspx)

In addition we will gauge:

- Meeting needs: we will benchmark and measure the overall satisfaction of levy payers with the support services provided by us through their levy funding.
- Knowledge transfer: We will benchmark and then measure annually, through levy payer surveys, the proportion of businesses engaging with AHDB that claim that we have had a positive influence on their enterprise.
- Climate change mitigation and adaptation: we will measure progress through the reports by the Committee on Climate Change on industry's actions to adapt and deliver reductions in GHG emissions.
- Export development: We will measure the increase in value of exports of British beef, lamb, pig meat, potatoes and cereals from £5.5bn in 2013 towards a target of 10% growth to £6bn by March 2017.
- Market intelligence: We will measure the increase in circulation of the combined Market Intelligence publications from circa 31,000 per month (November 2013) towards a target of 35,000 by March 2017.
- Skills: We will drive the new AgriSkills strategy – *Professionalism in Agriculture* - to deliver all the aims and objectives in its action plan by 31 March 2017, with progress recorded at quarterly meetings of the AgriSkills Forum Management Group.
- Operational efficiency: We will measure the AHDB support costs as a percentage of income –12.5% at 31 March 2013 - and reduce and then maintain this at 12%.

AHDB levy rates 01/04/14 to 31/03/15

Funding the Plan

The work of AHDB is funded by a statutory levy (a parafiscal tax) paid by farmers, growers and others in the supply chain. AHDB is legally responsible for the collection of these levies.

The sector boards, on an annual basis, recommend the levy rates that should be applied across their sectors in order to fund the strategic work programmes outlined in this Corporate Plan and explained in more detail in our divisional business plans. The main AHDB Board assesses the recommendations from the sector boards and decides if there is a business case for proceeding to a formal industry consultation on revised levy rates. Following industry consultation the Board proposes what annual levy rates should apply, for approval by Ministers in Defra and Devolved Administrations.

The recommendation, approved by UK Ministers, is for 2014/15 levy rates to remain unchanged. This decision reflects industry concerns arising from one of the most difficult years for farming in over a decade and the Board's considered view that the forecast financial income, supplemented with reserves where necessary, is adequate to fund the proposed work programmes for 2014/15. This decision was supported through the industry consultation responses.

The forecast total net levy for 2014/15 amounts to just over £56.5m and this is supplemented with grants and other income forecast to be in the region of £2.8m. The funds raised from each commodity sector are ring-fenced to ensure they are used to the benefit of the sectors from which they were raised.

Industry Sector	Forecast net levy income 2014/15
Pigs in England	£8.825 m
Beef and Lamb in England	£15.160 m
Milk in Great Britain	£6.920 m
Horticulture in Great Britain	£7.850 m
Cereals and Oilseeds in UK	£11.609 m
Potatoes in Great Britain	£6.202m
Grants and other income	£2.839 m
Total net income	£59.405 m

The levy rates for April 2014 to March 2015 can be found on page 10.

AHDB Levy Rates 01/04/14 to 31/03/15

The levy rates remain **unchanged** from 2013/14.

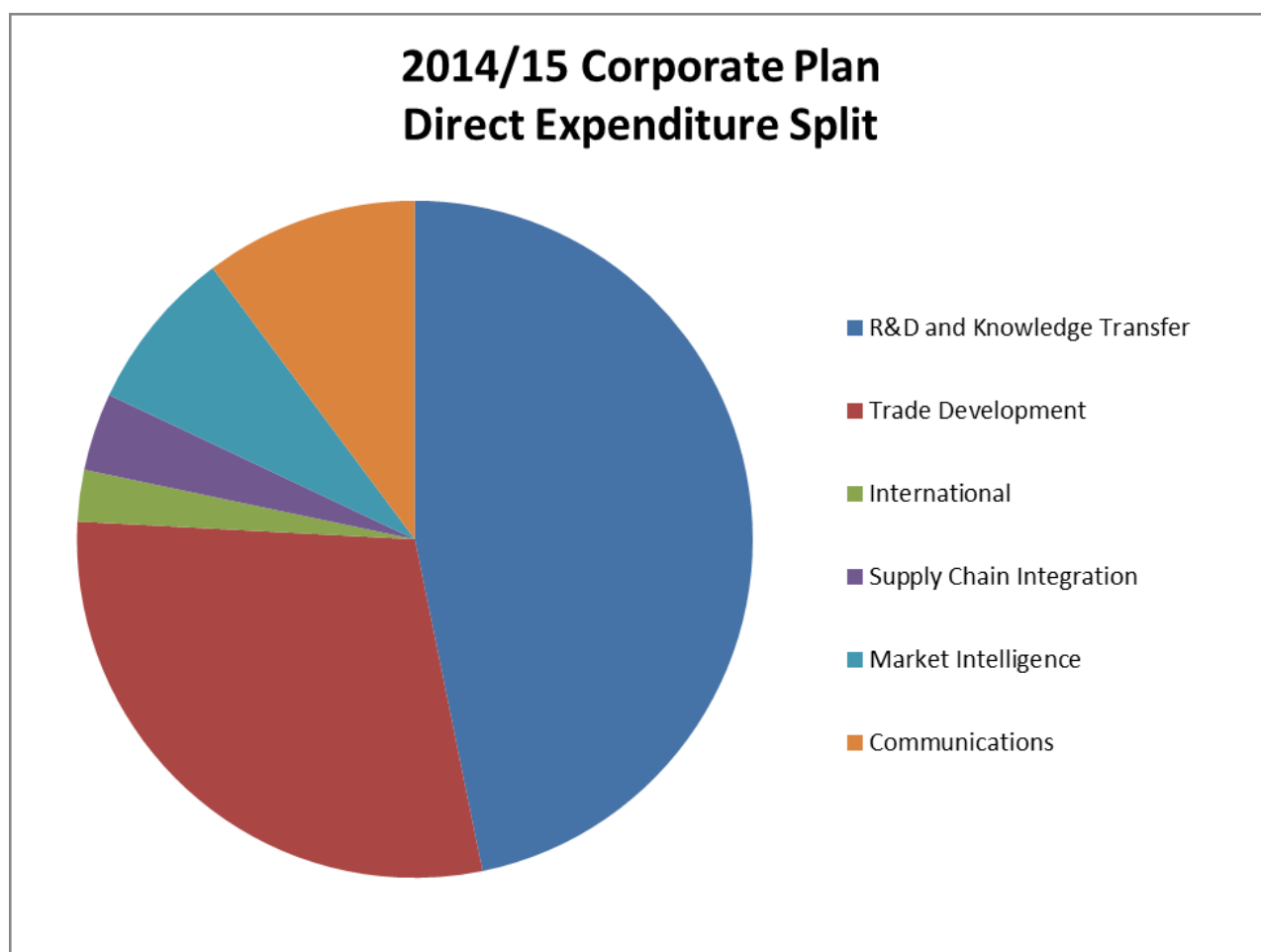
SECTOR	Levy rate 2013/14	Levy rate 2014/15	Higher rate for late payment
Pigs (England)	£ per head	£ per head	£ per head
Producer	0.85	0.85	0.935
Slaughterer/exporter of live pigs	0.20	0.20	0.22
Beef and Lamb (England)	£ per head	£ per head	£ per head
Cattle (excluding calves)			
Producer	4.05	4.05	4.05
Slaughterer/exporter of live cattle	1.35	1.35	1.35
Calves			
Producer	0.08	0.08	0.08
Slaughterer/exporter of live calves	0.08	0.08	0.08
Sheep			
Producer	0.60	0.60	0.60
Slaughterer/exporter of live sheep	0.20	0.20	0.20
Milk (GB)	Pence per litre	Pence per litre	Pence per litre
Buyers and direct sellers of milk	0.060	0.060	0.066
Cereals and oilseeds (UK)	Pence per tonne	Pence per tonne	Pence per tonne
Cereal grower	46.00	46.00	50.60
Cereal buyer	3.80	3.80	4.18
Cereal processor (human and industrial)	9.50	9.50	10.45
Cereal processor (feed)	4.60	4.60	5.06
Oilseeds	75.00	75.00	82.50
Horticulture (GB)	% sales turnover	% sales turnover	% sales turnover
Horticulture products	0.50	0.50	0.55
Mushroom spawn	Pence per litre	Pence per litre	Pence per litre
- Agaricus	8.0	8.0	8.8
- Non-agaricus	2.0	2.0	2.2
Potatoes (GB)			
Potato growers	£42.62 per hectare	£42.62 per hectare	£48.08 per hectare
Purchasers of potatoes	£0.1858 per tonne	£0.1858 per tonne	£0.2076 per tonne

Budget

The table on page 13 contains the budget for 2014/15 for AHDB as a whole, including our subsidiary, ¹MLCSL. The report also shows indicative budget plans for the following two years.

Divisional-level budgets for our BPEX, DairyCo, EBLEX, HDC, HGCA and Potato Council divisions are contained in the more detailed divisional business plans which are available on <http://www.ahdb.org.uk/publications/consultation.aspx>.

Overall in 2014/15 AHDB is aiming to deliver a break even budget at the financial year end.



¹ In addition to the levy-funded operation, there is one subsidiary in the AHDB group that actively trades, called Meat & Livestock Commercial Services Limited (MLCSL). It provides data, advice, logistics and inspection services to the meat and livestock industry on a commercial basis. All MLCSL costs are fully accounted for within the company and any profits returned to AHDB to supplement levy funds.

The chart below shows how the levy collected from each commodity sector in 2014/15 (ringfenced to be used to support the sector from where the levy was raised) will be deployed across the core activity areas of R&D and knowledge transfer/exchange, trade development, international, supply chain integration, market intelligence (e.g. pricing and other business information), communications and support services (IT, finance, legal, HR, etc).

This helps to demonstrate the different work stream and investment priorities across the sectors (detailed within our divisional business plans).

This chart shows expenditure as a percentage of the overall income ring-fenced for that commodity sector

Budget 2014/15	English Pigs (BPEX)	English Beef and Lamb (EBLEX)	GB Milk (DairyCo)	GB Horticulture (HDC)	UK Cereals and Oilseeds (HGCA)	GB Potatoes (PCL)
Income:						
Net Levy Income	8,825	15,160	6,920	7,850	11,609	6,202
Other Income	64	1,390	468	257	250	410
Total Net Income	8,889	16,550	7,388	8,106	11,859	6,612
Expenditure (% of net income):						
R&D and Knowledge Transfer	33%	16%	64%	75%	47%	41%
Trade Development	40%	53%	4%	0%	6%	21%
International	6%	2%	0%	0%	3%	2%
Supply Chain Integration	1%	5%	0%	0%	7%	3%
Market Intelligence	7%	8%	9%	1%	8%	7%
Communications	4%	4%	13%	18%	12%	6%
Support	12%	9%	17%	10%	14%	19%
Total Expenditure	103%	97%	105%	103%	98%	99%
Surplus/(Deficit) to/(from) reserves	-3%	3%	-5%	-3%	2%	1%

The last two lines in this table show if a sector is running a breakeven budget (i.e. total expenditure = 100%), a surplus budget (i.e. total expenditure is less than 100% and the surplus is going to build back up reserves), or a deficit budget (i.e. total expenditure is more than 100% and the extra funds are being drawn down from reserves).

AHDB budget for 2014/15 to 2016/17

AHDB	FULL YEAR £'000					
	12/13 Actual	13/14 Forecast	14/15 Budget	15/16 Budget	16/17 Budget	14/15 vs 13/14
INCOME						
Gross levy	54,293	53,279	56,631	57,525	57,858	3,352
Less bad debts	15	-171	-65	-66	-66	106
Fee and grant income	4,600	3,288	2,839	2,582	2,584	-450
Commercial Services Income	4,803	4,375	4,386	4,476	4,556	11
Non-levy income	9,402	7,663	7,225	7,058	7,140	-438
TOTAL INCOME	63,710	60,770	63,790	64,517	64,932	3,020
EXPENDITURE						
DIRECT						
R&D and Knowledge Transfer	-22,154	-22,269	-24,635	-24,330	-24,683	-2,366
Trade Development	-14,917	-14,839	-14,745	-15,143	-15,096	94
International	-1,097	-1,211	-1,358	-1,300	-1,300	-147
Supply Chain Integration	-1,861	-1,980	-1,920	-1,940	-1,940	60
Market Intelligence	-3,924	-4,185	-4,134	-4,103	-4,114	51
Communications	-5,037	-4,473	-5,207	-5,278	-5,302	-735
Commercial services	-4,221	-3,765	-3,781	-3,871	-3,951	-16
TOTAL DIRECT EXPENDITURE	-53,211	-52,722	-55,780	-55,965	-56,385	-3,058
SUPPORT						
Sector Specific Administration	-2,971	-3,068	-2,864	-2,855	-2,863	205
HR and Corporate Services						
HR & Legal / Payroll	-644	-690	-603	-613	-619	88
Facilities	-1,331	-1,436	-1,498	-1,602	-1,618	-62
Finance and Business Services						
Finance	-939	-859	-804	-818	-826	54
Levy Collection	-298	-280	-296	-301	-304	-16
Procurement	-166	-210	-196	-199	-201	14
IT	-643	-660	-796	-810	-818	-136
Main Board / Advisory	-621	-619	-590	-599	-605	29
Corporate Communications	-210	-288	-305	-310	-313	-16
R&D	-159	-139	-70	-95	-96	69
TOTAL SUPPORT EXPENDITURE	-7,981	-8,250	-8,020	-8,202	-8,263	229
TOTAL EXPENDITURE	-61,193	-60,972	-63,800	-64,167	-64,648	-2,829
Operating Surplus/(Deficit)	2,517	-201	-10	350	284	191
NON-OPERATING ITEMS						
Income	0	0	0	0	0	0
Interest receivable	26	182	142	141	141	-40
Interest payable	0	0	0	0	0	0
Taxation	2	0	0	0	0	0
Exceptional reorganisation expenditure	-216	-57	-32	-15	-15	25
Other non-operating costs	-44	246	0	0	0	-246
Net FRS17 Entries (HGCA pension)	-75	-75	-75	-75	-75	0
Share of Commercial Services Returns	0	0	0	0	0	0
TOTAL NON OPERATING ITEMS	-307	297	35	51	51	-262
Retained Surplus/(Deficit)	2,210	95	25	401	335	-71
Support Exp. Excl MI % of Income	12.5%	13.6%	12.6%	12.7%	12.7%	
Central support % of Income	7.9%	8.5%	8.1%	8.3%	8.3%	
Opening general reserves	17,397	19,607	19,702	19,727	20,128	
Retained surplus/deficit	2,210	95	25	401	335	
Closing general reserves	19,607	19,702	19,727	20,128	20,463	
Opening pension reserves	1,631	1,584	1,584	1,584	1,584	
Pension movement	-47	0	0	0	0	
Closing pension reserves	1,584	1,584	1,584	1,584	1,584	

AHDB leadership team

AHDB Board

Chair

Peter Kendall

Independent members

Lorraine Clinton

Tim Kelly, Remuneration and Nominations Committee Chair

Will Lifford, Audit and Risk Assurance Committee Chair

Agriculture and Horticulture industry members

(Post vacant), Chair of the DairyCo sector board – dairy in GB

Neil Bragg, Chair of the HDC sector board – horticulture in GB

John Cross, Chair of the EBLEX sector board – beef and lamb in England

Stewart Houston CBE, Chair of the BPEX sector board – pig meat in England

Jonathan Tipples, Chair of the HGCA sector board – cereals and oilseeds in UK

Fiona Fell, Chair of the Potato Council sector board – potatoes in GB

AHDB Senior Executive Team

Tom Taylor, Chief Executive

Nick Allen, Director of EBLEX Division – beef and lamb in England

Guy Attenborough, Director of Communications & Legal Services

Ken Boyns, Director of Market Intelligence

Rob Clayton, Director of Potato Council Division – potatoes in GB

Ian Crute CBE, Chief Scientist

Chris Goodwin, Director of Finance and Business Services

Rebecca Geraghty, Director of HGCA Division – cereals and oilseeds in UK

Bill Parker, Director of HDC Division – horticulture in GB

Duncan Pullar, Director of DairyCo Division – dairy in GB

Mick Sloyan, Director of BPEX Division – Pig meat in England

AHDB head office address

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