

Grain OUTLOOK

THE JOURNAL FOR CEREALS & OILSEEDS

AHDB



Spring 19



BREXIT? 'BALDERDASH'

Colin Chappell reports from the
2018 Monitor Farm conference

FEEDING THE NATION: FIBRE

AHDB is working with the industry
to keep the country moving

INDUSTRY MUST LOOK BEYOND HEADLINE YIELDS

First results from the AHDB Recommended Lists Look Ahead survey

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LETTER FROM THE EDITOR



ELEANOR HOLDSWORTH EDITOR

As a society, we seem to want to ever more divide our world into two camps. Leave or remain? Rural versus urban. Organic versus conventional...

A binary perspective doesn't help – we're writing off 50 per cent of the world. What we need is good, independent evidence and the mental skills to interpret this information.

Here's a recent example from the Monitor Farm conference (19–20 November 2018). We heard how it's important to understand machinery costs so a farm's machinery fleet matches the physical requirements of the land. However, the other truth to hold alongside this is that, as farmers, you're all people who have other responsibilities. So do you get a bigger machine than you need for your farm, in order to achieve a better work–life balance?

At AHDB, we hold strongly to our independence. With our initiatives like the Monitor Farm programmes,

we're trying to build the industry's capacity for critical thinking – measuring, managing – using all the relevant information to make informed decisions that are good for your business and good for you.

We know that daily decisions on farms are nuanced – there's no blueprint. But what we can help with is the research, evidence and opportunities to learn from each other.

As usual, this Grain Outlook highlights just a snapshot of AHDB's work on your behalf around the country. For more information do visit our new website, ahdb.org.uk, get in touch with your Knowledge Exchange Manager (see pages 28–35) or get involved in your local Monitor or Strategic Farm.

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VIEW FROM THE CHAIR

PAUL TEMPLE AHDB BOARD MEMBER SECTOR CHAIR FOR CEREALS & OILSEEDS

Farming has an uneasy relationship with data – increasingly we have access to unprecedented amounts of information. With so many variables, it can be difficult to extract what is meaningful, what can be managed and what can make a difference.

There has been significant government investment in the agri-tech centres and a huge amount of commercial investment in a wide variety of precision equipment, ranging from crop sensors to field-scale robots. AHDB

has an important role in assessing where the potential lies, how we can get the benefit from it and, with the Monitor Farm network, subjecting it to practical scrutiny.

The use of data is not confined to crop growing, as it can have real market implications. The sophistication of satellite imagery allows global crop potential to be constantly monitored. With world production and supply tightly balanced, any weather effect will be closely watched through the key spring period.

The area where we can hopefully see a real positive benefit is in our ability to use data for integrated pest management (IPM), but it does come with one challenge for all of us to think about: how do we value data and who pays for it? Any thoughts are welcome.

NEWS IN BRIEF

GRAIN CHAIN SCIENCE

In 2018, we sent more than 600 science kits to UK primary and secondary teachers, designed to encourage pupils to examine the scientific processes that make bread rise.

It was part of the Grain Chain education programme, run by AHDB and the National Association of British and Irish Flour Millers (nabim).

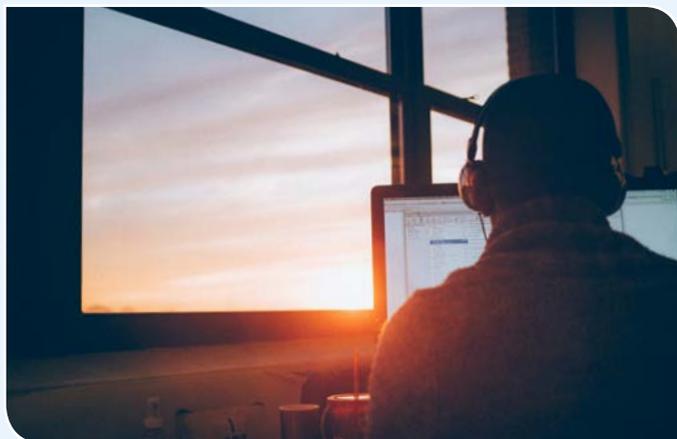
ahdb.org.uk/education

WEBINARS

Join a virtual Monitor Farm or Strategic Farm meeting from the comfort of your own home or office.

Hosted by AHDB, featuring industry experts and farmer experience, these webinars give you the chance to hear the latest insight and discuss hot topics of the day.

Previous recordings and future dates are available on cereals.ahdb.org.uk/webinars



BASIS POINTS

As of this edition, you'll be able to apply for one BASIS point and two NRoSO for each year that you receive and read Grain Outlook. You can't claim points retrospectively. The points year runs from 1 June 2018 to 30 May 2019. To claim your points, visit ahdb.org.uk/co-cpd

BEEN TO A MONITOR FARM?

If you've been to a Monitor Farm meeting in the last 12 months, please complete the survey we sent with this edition of Grain Outlook. It helps us to understand how the Monitor Farm programme is helping the industry and how it can be improved. Completed surveys will also be entered into a prize draw for a £50 hamper. Want to complete it online?

Visit cereals.ahdb.org.uk/monitorfarms

END OF THE STOREY

Dr R.M.J. (Mike) Storey has been a key player in the potato industry for a long time – some 36 years with AHDB and its predecessor organisations and six years in potato-focused research before that. He retired in December, after 42 years in the industry.

In 2009, Mike was awarded the PBGA's James Hardie Award; in 2012, he was awarded the British Potato Industry Award and, in 2017, received the John Green Memorial Trophy for his exceptional contribution to the British potato industry.

HELPING COMMERCIAL BEEF FARMERS BOOST PROFITS

New Estimated Breeding Values (EBVs) that are linked to the traits that commercial farmers get paid for, such as carcass quality and speed of finishing, have been developed and are now available to producers. In order for a bull to have these EBVs available, their calves must have sire details recorded on their BCMS passports. Without this information, any data relating to the bull is meaningless as his slaughtered progeny cannot be identified.

AHDB is now encouraging farmers to share the message and shout about the sire.

egenes.co.uk/carcassdata

VEG POWER CAMPAIGN

A new marketing campaign to inspire everyone to eat more vegetables has been launched, with support from AHDB. The 13-week national campaign, which received £2m worth of advertising space from ITV, started on 25 January. See page 17 for one of the posters from the campaign.

Veg Power is an independent campaign funded by industry stakeholders, including AHDB.

vegpower.org.uk #vegpower

FARMBENCH

Farmbench, our free, easy-to-use online tool to help farmers identify their business's strengths and weaknesses by comparing anonymously with other similar farms, is now live for the dairy sector too. With a backdrop of volatility and uncertainty over future farm support arrangements, now is a good time to fully understand how well your business is doing.

ahdb.org.uk/farmbench



STUDENTS' UNION: TOUGH CHOICES FOR CSFB

Jason Pole, AHDB Communications Manager

Once oilseed rape (OSR) has got up and away, many breathe a sigh of relief. But an emerged crop is not a problem-free guarantee. It continues to face attacks from pest and disease and the damage gets harder to quantify – no longer as black and white as ‘dead’ or ‘alive’, just nobbled to varying degrees.

With the withdrawal of neonicotinoid seed treatments and resistance to pyrethroids on the rise, cabbage stem flea beetle CSFB is one pest that has become increasingly difficult to control, especially when soil conditions hold back crop development.

Discovering why some fields or field patches succumb to CSFB while other parts escape unscathed is the subject of several AHDB research projects. In one PhD project, student Jessica Hughes has dedicated four years to study crop tolerance to the pest, looking at both the impact of adults and larvae.

Once CSFB eggs hatch, larvae burrow into leaf petioles and migrate to the main stem. Over the winter, they can cause significant damage to precious shoots. Jessica set out to look at the variation in OSR response to larvae, including differences in yield-preserving developmental responses, such as the crop growing around the larvae and the outgrowth of axillary buds.

The pest also infests other brassica crops. In fact, dramatic variation in pest damage has been observed among *Sinapis alba* and *Brassica juncea*

varieties used in mustard production. As these varieties could hold valuable clues to the mechanisms behind pest tolerance, they too are being studied.

Jessica uses a set of OSR (*Brassica napus*) lines that represent the genetic diversity found in this species – called the Diversity Fixed Foundation Set (DFFS) – to study variation in pest damage. One avenue of investigation involves the use of ‘choice chambers’ (see picture, inset), which can be used to identify the plant lines that adult CSFB prefer to eat.

Jessica said: “The findings from the choice chamber experiments are clear-cut: beetles have a strong preference for some lines and a clear distaste for others.”

Experimental methods are also being developed in the studentship. For example, Jessica has found a reliable way to inoculate plants with CSFB eggs so that variability in larval damage can be assessed. Early results show significant variation in larval damage between *B. napus/B. juncea* and *Sinapis alba*. The intention is to identify the genes associated with the various degrees of palatability and crop tolerance and to design molecular markers to help breeders screen for resistance in variety trials.

Genetic basis of winter oilseed rape resistance to the cabbage stem flea beetle (21120064) runs from October 2017 until September 2021. The work is led by the John Innes Centre. Elsoms Seeds is an industry partner.

Around 80 post-graduates convened in Solihull for the third AHDB-wide studentship conference last year (26–29 November 2018). The event lets students showcase their work and gain insight into the wider industry and the career opportunities it offers.

CROP AWARDS

Best poster: Jessica Hughes (John Innes Centre). Topic: management of cabbage stem flea beetle

Best final year presentation: Aaron Hoyle (SRUC). Topic: components of specific weight in barley grains



Hayley Campbell-Gibbons (right), chair of the AHDB Horticulture Board, presents the best poster presentation to Jessica Hughes (left)

INDUSTRY MUST LOOK BEYOND HEADLINE YIELDS

Jason Pole, AHDB Communications Manager



A flexible variety trialling system that looks beyond headline yields is required by growers and users of cereals and oilseeds in the UK, according to results from a comprehensive survey of users of the AHDB Recommended Lists (RL).

Throughout 2018, AHDB's 'Look Ahead' activity has examined how people use the RL and explored ways in which the variety trialling project could be improved. Many facts and figures have been generated by this process, so we've taken the opportunity to let them, and other RL-inspired numbers, speak for themselves.

VARIETY TRIAL DATA

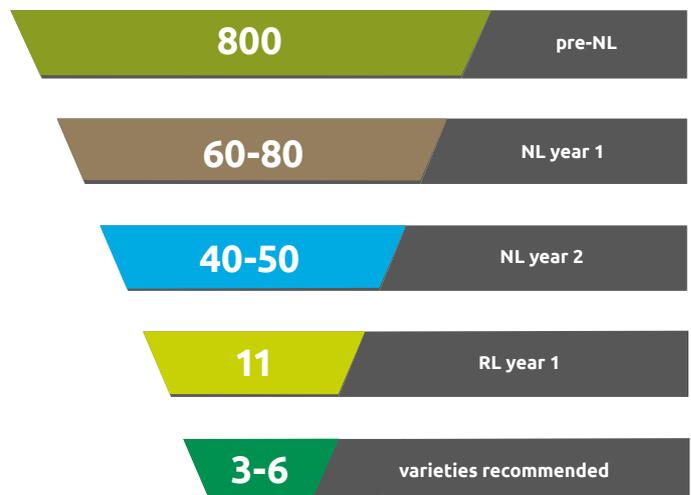
The AHDB Recommended Lists for cereals and oilseeds 2016–2021 is managed by a consortium of AHDB, British Society of Plant Breeders (BSPB), Maltsters' Association of Great Britain (MAGB) and National Association of British and Irish Millers (nabim).

£7,953,359
– AHDB INVESTMENT

£20,263,209
– TOTAL INVESTMENT

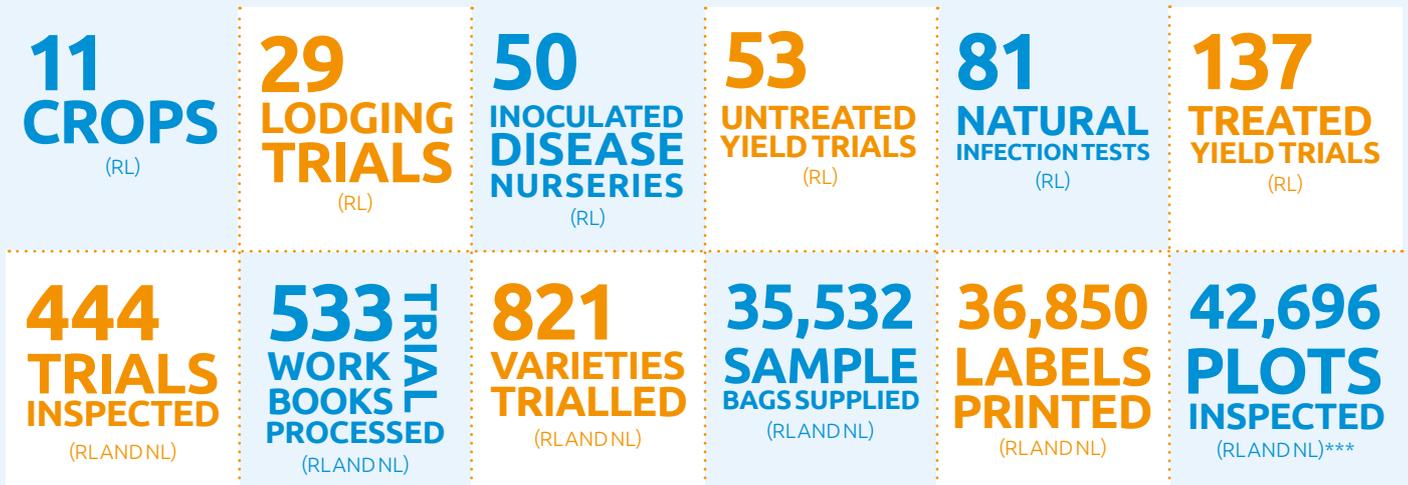
SURVIVAL OF THE FITTEST: TRIALS HONE IN ON THE STRONGEST VARIETIES*

Number of varieties trialled



*Typical range shown. NL = National List

TOUGH TESTS: HUNDREDS OF TRIALS NEEDED EACH YEAR TO AID ROBUST SELECTION**



Data for harvest 2018 shown *Plots inspected details: 10,080 (NL1) + 6,954 (NL2) + 6,182 (N) + 1,741 (NR****) + 17,739 (RL) = 42,696
****NR = combined RL and NL trials for minor crops with relatively few varieties

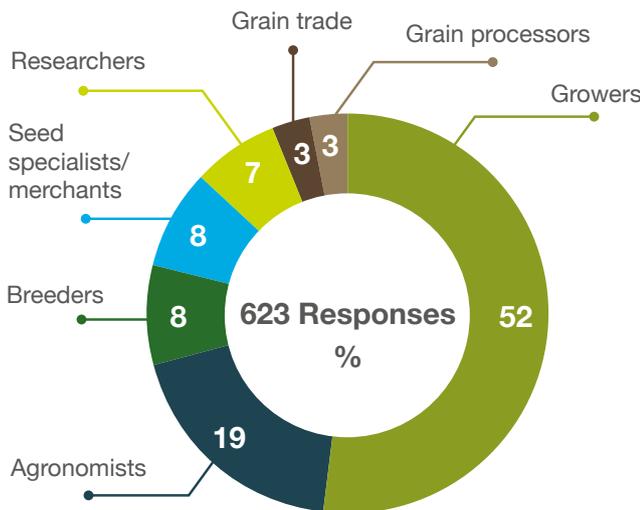
2019/20



'Disease resistance' most 'crucial feature' (grower respondents)

LOOK AHEAD: TOP-LINE SURVEY RESULTS

The survey was open for eight months and discussed at dozens of events.



THE WORKING GROUPS

Four working groups have been established to take forward the detailed findings from the survey. Each group will develop a costed action plan for consideration by the RL Board in summer 2019.

1. Re-sowing and recommendation process

How can the RL best strike the balance between yield, disease and economic performance?

2. Number and location of trials

How should trials be distributed and analysed to provide the most robust regional information?

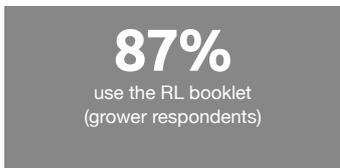
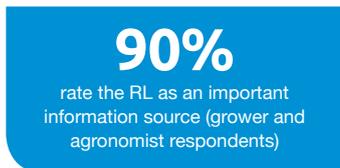
3. New traits and breeding advances

What is the most flexible system that allows the traits most likely to bring the biggest rewards to be prioritised and fast-tracked?

4. Communication and knowledge exchange

How can digital tools, such as Harvest Results interactive, and more conventional channels, such as regional events, be exploited to get RL data to the market?

Further information on the RL can be accessed via ahdb.org.uk/rl





THE FUNGICIDE RESISTANCE CHALLENGE

Jason Pole, AHDB Communications Manager

Robust fungicide programmes have helped support high yields in wheat and barley. Such approaches have particular value where varietal disease resistance is low or where disease pressures are hard to predict. But there are, of course, costs associated with intensive spray programmes – particularly the development of fungicide resistance.

When fungicides are applied, susceptible fungal strains are usually controlled very effectively. However, any resistant strains present (through mutation or natural variation) are more likely to survive and reproduce. This process of ‘selection’ makes each subsequent generation more difficult to control. In the absence of any fitness costs, resistant strains may come to dominate the population, causing disease control to fail.

In wheat, septoria tritici is currently of greatest concern, with significant shifts in sensitivity to strobilurins and azoles in UK populations. Isolates with mutations that confer reduced sensitivity to succinate dehydrogenase inhibitors (SDHIs) are also present across the UK, with increasing complexity and frequency each year.

For barley, ramularia is the greatest concern, with significant shifts in sensitivity to strobilurins, azoles and SDHIs in UK populations.

Though good disease control can be achieved in both crops by using robust fungicide programmes, it is essential to use comprehensive anti-resistance strategies to slow resistance development and preserve the efficacy of both existing and new chemistry.

HOW TO MANAGE FUNGICIDE RESISTANCE

A good resistance management strategy does not need to compromise disease control. In fact, if done well, such strategies should result in robust and sustainable control.

Strategies should:

- Exploit all practical, non-chemical control methods to reduce disease risk and slow epidemic development
- Limit the time over which the pathogen population is exposed to the fungicide
- Use effective mixtures and alternate fungicides with different modes of action
- Use the minimum dose required to effectively control target pathogens

NON-CHEMICAL CONTROL

Varietal resistance to disease remains patchy, with some popular varieties having low or no resistance ratings. This is especially true for barley. Modern wheat varieties, however, have improved resistance to septoria and rust. Results from AHDB and industry partners show that such varieties can be managed with fewer fungicide inputs, reducing selection pressure and still giving equivalent outputs to more susceptible varieties. Even for barley, where markets permit and the wider agronomy package suits, varieties with resistance to the diseases prevalent should be selected. Good varietal resistance also provides the added bonus of greater flexibility in spray timing.

Appropriate husbandry techniques can also be used to reduce disease pressure. For example, avoiding very early sowing of winter wheat can help reduce early-season septoria pressure. The same is true in spring barley, as very early sowing (December to February) can increase rhynchosporium pressure. Controlling volunteers and reducing crop debris can also help reduce rhynchosporium, net blotch, brown rust, yellow rust and mildew pressure.



FUNGICIDE FUTURES

As part of the Fungicide Futures initiative, AHDB has published practical measures to combat fungicide resistance in pathogens of wheat and barley. The publications provide best-practice information on treatment frequency, timing, dose, mixtures, alternation, multi-sites and programmes.

ahdb.org.uk/knowledge-library/fungicidefutures

Fungicide Futures is a joint initiative between AHDB and the Fungicide Resistance Action Group UK (FRAG).



“ A good resistance management strategy does not need to compromise disease control. ”

RAMULARIA, RESISTANCE AND RATINGS

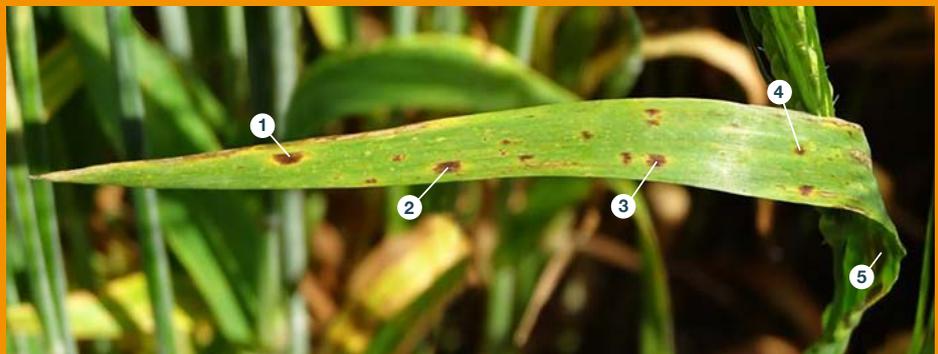
The international research community must unite to provide ramularia leaf spot solutions.

This was a key message at a ramularia workshop hosted by AHDB (3–4 October 2018). Lack of crop resistance, shifts in fungicide efficacy, diminishing chemistry, complex symptom development and accurate forecasting were cited as some of the key challenges.

Recent AHDB-funded research has failed to identify a consistent environmental variable linked

to disease epidemics. It also confirmed that the disease is extremely difficult to identify and assess accurately. Because of these challenges, AHDB suspended the disease ratings in the 2019/20 edition of the RL. Dedicated ramularia leaf spot trials will be conducted this year to improve the disease assessment process, in view of reinstating ramularia ratings as soon as possible.

ahdb.org.uk/ramularia



To identify mature ramularia lesions, apply the five 'Rs':

1. Ringed with yellow margin of chlorosis
2. Rectangular shape

3. Restricted by the leaf veins
4. Reddish-brown colouration
5. Right through the leaf

RB209: SULPHUR SO GOOD...

Jason Pole, AHDB Communications Manager

Sulphur (S) recommendations only require a small adjustment and not the significant uplift anticipated by some, according an analysis of winter oilseed rape (WOSR) experiments.

Recommendations for S use were first published in nutrient guidance (RB209) in 1994. Since then, deposition from the atmosphere has decreased dramatically and the yield potential of modern varieties has increased. The assumption has been that modern WOSR production needs much more applied sulphur than the official recommendations suggest.

To test this assumption, AHDB funded ADAS to run S-response experiments at ten field sites (harvest years 2014 to 2017) and to look at results from a further eight experiments (carried out between 2011 and 2013).

Ten of the 18 experiments showed a yield response to S fertiliser of between 0.1 t/ha and 4.4 t/ha. The economic optimum S rates at the sites varied between 30 kg and 79 kg SO₃/ha.

No evidence was found to suggest that modern, higher-yielding WOSR varieties required significantly more fertiliser. As WOSR responded to a slightly higher S rate than in the current recommendations (50 kg to 75 kg SO₃/ha) at some sites, the researchers suggested the range be extended slightly – to 50 kg to 80 kg SO₃/ha.

All of the sites that showed a yield response had light- or medium-textured soils (i.e. loamy sand, sandy loam or sandy clay loam soils). In fact, soil texture and winter rainfall was found to be a more reliable predictor of S deficiency than soil analysis or tissue testing.

The work also found that crops are able to use S from organic sources more efficiently than previously thought (see table).

Sajjad Awan, who manages nutrient research at AHDB, said:

“ With around 65% of farms in Britain applying organic materials, and with both autumn and spring applications making a valuable sulphur contribution, it means many farmers could now potentially reduce their farms' inorganic fertiliser requirements ”

LATEST CHANGES TO RB209

The AHDB Nutrient Management Guide (RB209) offers best-practice guidance on the application of mineral fertilisers, manures and slurries to crops and grassland. AHDB invests in research to ensure guidance reflects current commercial practice. All relevant research findings are considered by the UK Partnership for Crop Nutrient Management – the body responsible for agreeing changes to RB209.



Additions and revisions to the ninth edition include:

- Information on the Agricultural lime Quality Standard (AQS), which guarantees regulatory quality of agricultural lime products in the UK
- Enhanced information on excess winter rainfall, which can be used to improve estimates of Soil Nitrogen Supply (SNS)
- Updated information on S rates, as well as improvements in S supply figures from organic materials (see table) and the S risk matrix
- Information on the Biosolids Assurance Scheme (BAS)
- Minor adjustment to data on extra nitrogen (N) applications and grain protein content

Organic material	Sulphur use efficiency	
	Previous recommendations	Revised recommendations
Autumn applied		
Livestock manures	5–10%	5–10% [15%]
Biosolids	10–20%	10–20% [25%]
Spring applied		
Cattle FYM	15%	No change
Pig FYM	25%	No change
Broiler litter	60%	No change
Cattle/pig slurry	35%	45%
Biosolids	20%	35%

[] = use for grassland and oilseed rape cropping

INVESTMENT BOLSTERS N AND S RESEARCH IN CEREALS

Two new AHDB projects on nitrogen (N) and S management in oats and wheat have been bolstered by a half-a-million-pound co-investment from industry. The latest research is in addition to a complementary AHDB project on barley, which started in 2017. The funding injection means over £2 million is now being invested in N and S management research in cereal production, with 80% of the funding coming from non-levy sources.

DID YOU KNOW?

For every £1 invested by AHDB in nutrient management research, industry contributes £3*

A panel of nutrient management experts debated the latest revisions to RB209 at December's AHDB Agronomists' Conference. The video (session 4) can be viewed at cereals.ahdb.org.uk/livestream

*Based on investment figures for 12 nutrient research projects funded since the 2017 revision of RB209.



Inspiring farmers, growers and producers to succeed in a changing world

Strategic Farming

Driving innovation and growth



BREXIT? 'BALDERDASH'

Colin Chappell, Brigg Monitor Farm

A stronger word was used, but thus started a breakout session of the Monitor Farm Conference 2018. For those that have never been, it is an annual meeting of Monitor Farmers past and present, their steering groups and guest speakers. So why should anyone go? Well, the words 'truly inspirational' or 'thought-provoking' spring to mind. Normally during any conference, there are times when the brain wanders, and especially an hour or so post-lunch you feel drowsy. I can honestly say that has never happened to me during my two annual visits.

This year's theme was resilience: personal, business, environmental and technical. So, for me, Heather Wildman's aforementioned comment struck home large. There is always a 'Brexit' approaching somewhere in your life. By having Mother Nature as our chief business partner, we have to have the ability to build a sustainable environment around us in all its forms.

Keep it simple, use the basics and pay attention to detail. If you can measure something, you can then manage it. Be it personally by taking control of your own destiny, the approach of 'I' not 'we'

“... by focusing on an end goal and being prepared to adapt your strategy, as you will inevitably have to, you can move to a more satisfactory conclusion”

and therefore reinvesting in yourself to then embolden those around you. Using benchmarking and integrated pest management (IPM) factors that allow you to monitor and diagnose issues before they get too large will allow you to make decisions that may have at first appeared difficult. However, make those findings realistic and achievable but, more importantly, give them a timeline, or you will find they will inevitably drift.

At the conference we were lucky enough to listen to people who worked outside agriculture and therefore had a different sense of perspective. Be it a former military officer in Iraq or Bear Grylls' right-hand man, they both gave us an insight into resilience: by focusing on an end goal and being prepared to adapt your strategy, as you will inevitably have to, you can move to a more satisfactory conclusion.

From New Zealand, we learnt that knowledge exchange increased among farmers as subsidies disappeared and that yield and cost of production became king, not at any cost and not just around individual crops but on a whole farm approach. 'Dr Food' (Professor David Hughes) showed us how with changing world populations came a changing diet that could mean a different protein focus to the food we eat.

Finally, there was a dawning realisation that farming is becoming more knowledge-intensive and that IPM will become not just a necessity but a licence to operate, which will mean that we all see building resilience as an opportunity to run with. Motivation that comes from that will influence and inspire others, which will in turn lead to personal satisfaction.

cereals.ahdb.org.uk/monitorfarms

TAKING COVER CROP RESEARCH ON FARM

Emily Pope, AHDB Knowledge Transfer Manager



BOLD CLAIMS SURROUND COVER CROPS

They have the potential to improve soil structure and quality, improve soil nutrient and water retention, reduce the risk of soil erosion, surface run-off and diffuse pollution and manage weeds or soilborne pests. However, realising the potential benefits relies on effective species selection, management and destruction.

A current AHDB research project is investigating the potential economic, agronomic and ecological benefits from cover crops. Meanwhile, Brian Barker, host of the Strategic Farm East, and several monitor farmers in the West and South West regions are doing their own try-outs.

STRATEGIC FARM EAST

Last edition (Autumn/Winter 2018), we covered the comprehensive baselining work carried out during the first year of the Strategic Farm East project at Lodge Farm near Stowmarket.

We already know that cover crops reduce losses of soil and nutrients.

The field drain water analysis at the Strategic Farm indicated that cover crops could mitigate nitrate losses from the soil during the winter. This year (2018–19), Brian and the Strategic Farm will be looking at how much of the nutrient taken up by the cover crop is available for the next cash crop or leached later on.

Across two 15 ha fields, which both came out of winter wheat and will be drilled with spring beans, Brian is comparing: bare soil, overwintered stubble, oil radish and rye cover crop mix drilled into ploughed soil, and oil radish and rye cover crop mix established into stubble. During the year, he'll be looking at the water coming out of the field drains again to see what effect there is on nutrient leaching.

MONITOR FARMS

Six monitor farmers across the West and South West are trying out four cover crop mixes this winter, to assess their impact on soil and the subsequent cash crop.

The farmers are:

- Richard Payne, Taunton
- Howard Emmett, Truro
- Roger Wilson, Malmesbury
- James and Georgie Cossins, Blandford
- Tom Rees, Pembrokeshire
- Adrian Joynt, Bridgnorth

And the mixes are:

- Mix 1: deeptill radish, bristle oat, sunflower, squarrose clover, serradella, phacelia, linseed, buckwheat, false flax, common vetch, Egyptian clover, niger and Abyssinian mustard
- Mix 2: Egyptian clover, deeptill radish, field pea, phacelia, niger, bristle oat, common vetch, linseed, Persian clover, serredella and Abyssinian mustard
- Mix 3: rye, tillage radish and vetch
- Mix 4: black oats, Slovenian vetch and berseem clover

Before the cover crops were drilled, all of the farmers took soil pH samples, organic matter and nutrient analyses (P, K and Mg) from the top soil. While the cover crops are in the ground, the farmers will be taking regular photographs, and following the cover crop destruction, each of the monitor farmers will carry out the same soil analyses again, as well as a visual evaluation of soil structure (VESS) and an earthworm count.

After the spring crops have been drilled, each of the monitor farmers will record their observations as to the workability of soil, weed pressure and any changes to nitrogen applications in the spring crops as a result of the cover crop.

As you'd expect, each of the farmers in the try-out has slightly different priorities when it comes to cover crops. But with the observations taken throughout the seasons, each farmer will be able to start assessing the cover crops against their own goals.



Get involved with your local
Monitor Farm or Strategic Farm.
Find out more at
cereals.ahdb.org.uk/monitorfarms



THE EVOLVING NEEDS OF THE OVER-55'S

Grace Randall, AHDB Consumer Insight Analyst



The UK is a maturing population. Almost one in three of us is aged 55 or over and this demographic is growing, according to the Office for National Statistics.

In many areas, trends that impact the general population will also apply to the older generation, but we have identified some areas of divergence.

“The spending power of over-55s has never been greater. They make up a third of the UK’s population but hold 80% of the wealth, and their consumer spending has grown on average 4.4% annually for the past decade, compared with 1.2% for under-50s.” Source: Campaign

- 49% of the grocery spend in the UK made by over-54s
- 19.8 million people in the UK aged 55 and over
- £277 per person more spent eating out annually than under-55s

HEALTHY AGEING

The ‘healthy ageing’ trend is particularly prominent for the 55+ category. In the past five years, the number of in-home food servings chosen for health reasons has risen 14 per cent, according to Kantar Worldpanel. However, health can mean different things to different people.

Protein and fitness have more appeal to younger consumers compared with older consumers, who focus on vitamins and omega 3. Life expectancy in the UK has peaked in recent years and the focus for many consumers is now towards healthy ageing – remaining well, in order to enjoy life for as long as possible. Keeping healthy and maintaining brain performance is a top priority. Many are turning to food with functional benefits as a way to achieve this, representing an opportunity for marketers.

Older consumers believe they eat better and they are more likely to choose a food which contains a portion of fruit or

veg. The 55+ category perceive eating their ‘five a day’ as much more important (AHDB/YouGov tracker Oct 17–Aug 18), perhaps influenced by the healthy ageing trend.

In line with the healthy ageing trend, many older consumers are also looking for functional benefits in their meal choices to aid health. Products claiming to maintain healthy hearts, brains or digestion could be popular with those aged 55 and over.

For more consumer insights, visit ahdb.org.uk/retail-and-consumer-insight

What health means	
55+	Under 55
High in vitamins (such as calcium and iron)	High in protein
Low in calories/fat	Low in sugar
Portion of fruit or veg	Less processed
High in fibre	Natural
Heart health	Portion control

VEG POWER

All your vitamin A
Fuelled by a
carrot a day

Carrots contain Beta Carotene which your body turns into Vitamin A. There is enough in a medium carrot to meet your daily allowance for vitamin A.



#VEGPOWER

FEEDING THE NATION: FIBRE

The Department of Health recommends that adults consume 30 g dietary fibre a day. However, on average, we consume much less than this – about 19 g per day.

Low consumption may have implications for public health since there is consistent evidence that higher-fibre diets are associated with reduced risk of heart disease, type 2 diabetes and colorectal cancer, and fibre can improve digestive function by reducing constipation.

Fibres are carbohydrates that are not digested or absorbed in the small intestine. Instead, they reach the large intestine, where they may be broken down by bacteria, fermented or excreted.

As we are not getting enough fibre as a nation, AHDB, on behalf of UK farmers, growers, processors and others in the supply chain, has been working together with IGD and partners from across the industry to start addressing the problem.

The result of this work is an IGD interactive guide, published in November 2018, to help food processors and retailers encourage increased fibre in UK diets, through product reformulation, new product development and promotion.

Cereals and cereal products, fruit, vegetables and potatoes with skins on are all important sources of fibre: the

“Oat (or barley) beta-glucan has been shown to lower or reduce blood cholesterol. High cholesterol is a risk factor in the development of coronary heart disease”

UK's cereals and oilseeds farmers play a vital part in keeping the nation moving, as it were.

HEALTH BENEFITS

The IGD document includes guidance on EU-authorised health claims, which help companies communicate product benefits. For example, packaging on food that provides at least 1 g of the fibre beta-glucan from oats or barley per quantified portion can include a message like this:

“Oat (or barley) beta-glucan has been shown to lower or reduce blood cholesterol. High cholesterol is a risk factor in the development of coronary heart disease.”

Beta-glucans are found chiefly in the cell walls of fungi and plants, especially oats and barley.

MOVEMENTS IN THE MARKETS

According to IGD, growing numbers of product developers are exploring how to use fibres to reduce the sugar, fat and calorie content of food and drink products. This could be an area to watch in the future.

To download the guide, visit igd.com/charitable-impact/healthy-eating/reformulation/reformulating-with-fibre

HOW MUCH FIBRE IS TYPICALLY IN PORTIONS OF ARABLE-BASED FOODS?



50 g serving of porridge oats (made up with water): 0.5 g fibre



80 g serving of cooked pearl barley: 3.1 g fibre



30 g serving of bran flakes: 4.0 g fibre



Medium baked potato (eaten with skin): 4.7 g fibre



Two medium slices of wholemeal bread: 5.6 g fibre

(Nutritional content taken from McCance and Widdowson's Composition of Foods and retail data)



BRIDGING THE DIVIDE

In 2017, the Prince's Countryside Fund published some worrying figures. More than one in ten 18–24-year-olds had never seen a cow. Of that age group, 16% had never visited a farm and almost half didn't know when common fruit and vegetables were in season.

The urban/rural divide isn't helpful when it comes to public support for our industry. It's vitally important to help people from non-farming backgrounds to learn about their food. There are many initiatives and schemes to help you engage better with the people who eat the food we grow – FaceTime a Farmer, Open Farm Sunday and school visits, not to mention using social media and websites.

AHDB's Education team has been working closely with key partners across the agricultural education landscape as part of our new strategy. Education Manager Sue Lawton recently visited LEAF to find out more about the Countryside Educational Visits Accreditation Scheme (CEVAS), which helps farmers and others to make the most of visits to farms.

"I met a good mix of people at the training event, held at the National Trust, who were all keen to educate people about food and farming," she said. Sue heard how the training helped farmers to put together school visit schedules.

Neil Dyson, a dairy farmer who hosts school visits, said: "Many children

today, even when they are from a rural location, still don't connect very well the milk they drink, the cheese they eat, the burgers they have, with the countryside and farmers working the countryside. So I just wanted to help bring that connection together.

"I want children to understand where their food comes from, how we care for the animals and the environment, so they feel a bit more connected with the countryside around them."

Find out more at visitmyfarm.org/cevas-farmer-training

BREXIT PERSPECTIVES FROM BRUSSELS*



Kathy Roussel, Head of AHDB Brussels Office, Exports

Life is full of new beginnings and the New Year is usually a good time to reflect on the past and decide to make some changes.

When it comes to Brexit, hopes of a fresh start quickly faded away in Brussels as it soon became clear that the deal negotiated with UK government would not be voted through.

In a last minute attempt to provide some reassurance to UK MPs, the EU sent a letter to the PM the day before the first vote on 15 January, restating their intention to work speedily on a trade agreement to ensure the Irish backstop will not need to be triggered, something they repeated consistently over the

past months. The only new element to be found in their letter was the odd mention to their intention to publish the Withdrawal agreement and the political declaration “side by side” in the Official Journal, which can hardly be considered as a substantial concession.

No one in Brussels was surprised by the outcome of the UK parliament’s vote on 15 January. Actually, Juncker published an official statement very shortly after results were made available. In a nutshell, the key message was: while we regret this decision, it is now up to the UK to indicate future directions.

The same scenario repeated itself after the vote on the 29 January. EU

observers watched the discussions at the House of Commons in disbelief as it was clear that none of them could be workable given the EU red lines. The minute the Prime Minister stopped talking, Donald Tusk’s spokesperson made it clear that “The backstop is part of the Withdrawal Agreement, and the Withdrawal Agreement is not open for re-negotiation.”

As the clock is ticking, EU Member States are bracing for a no-deal scenario and stepping up preparations.

*Article written on 30 January 2019

NO DEAL CHALLENGES ACROSS UK AGRICULTURE AND HORTICULTURE

UK exports of agricultural and horticultural products are likely to be rendered uncompetitive if World Trade Organisation (WTO) tariffs come into play on our exports to the EU.

In addition, if the Government decides to drop all tariffs on imports from the EU this would have to apply to the rest of the world, meaning UK products could face increased competition on the domestic market. In many sectors, UK costs of production are high when compared with those of key international competitors. No deal could mean the loss of tariff barrier protection and more competition from global producers.

AHDB Senior Analyst Amandeep Kaur Purewal said: “The prospect of a no-deal scenario cannot be ignored. This would have a seismic impact on UK trade in agricultural and horticultural products, with major implications for the farming sectors.

“It is crucial farmers and policy makers fully understand the potential consequences of leaving the EU, whether in an orderly or disorderly manner, if we are to avoid massive disruption throughout the industry.

“At AHDB we are working to raise awareness of those potential impacts, through our Horizon reports, and online Brexit hub. More specifically, we are exploring ways to help growers cope with less labour, to ensure continued access to plant protection products and to bolster the domestic market, as well as further work to open new markets abroad for UK produce.”

Key findings of AHDB’s latest analysis include:

For cereals, the UK is a net exporter of barley, meaning exports could be hit with tariffs of €93 a tonne outside a tariff rate quota (TRQ). The UK flour trade could see considerable disruption even if there is a free trade agreement between the UK and EU as rules of origin would still apply, disrupting trade with the Republic of Ireland. AHDB has explored the impact on the milling and malting industries in an in-depth report.

For potatoes, there may be additional phytosanitary controls on fresh and seed potato trade between the UK and EU, which would likely make the certification process longer, increasing costs for businesses. Given that 99% of the UK’s imports of frozen potato products come from the EU, there may be an opportunity for import substitution if import tariffs were in place but considerable investment would be needed to capitalise on this.

The sheep meat sector is likely to be the worst hit by a no-deal Brexit. UK exports would suffer considerably if WTO tariffs of up to 50% of the price of meat were put in place – a huge blow to the UK’s competitiveness. In addition, around 90% of UK sheep meat exports are to the EU, meaning no deal is likely to hit sheep farmers’ incomes. AHDB has examined the potential impact of no deal on UK sheep meat production in an in-depth report.

For all Brexit news, information and analysis, including the potential impacts of various scenarios on farm business incomes, go to ahdb.org.uk/brexit

“It is crucial farmers and policy makers fully understand the potential consequences of leaving the EU, whether in an orderly or disorderly manner, if we are to avoid massive disruption throughout the industry”



TRAINING EXCELLENT MANAGERS

Alex Baines, an arable farmer from Essex, is taking part in AHDB's Professional Managers' Development Course and spoke to AHDB Skills Manager Tess Howe about what he's learnt.

Alex: I'm just over 30 and I've been working in agriculture all my life, mainly in the arable sector. I went straight from school to Writtle College to do a national diploma in agriculture and then a degree in agriculture and business management, which enabled me to get a job at the farm I'm still on, ten years later.

Where I am now, I've worked up through the ranks to become farm manager. It's a 1,200 ha arable farm in north-west Essex, near Saffron Walden. We cover seven different farms now, varying between stubble-to-stubble contracts to whole-farm contracts. It's a nice area of the country to work in and I enjoy it greatly.

Tess: What challenges did you have which made you want to join the course?

Alex: After leaving college, I started off operating the machinery on the farm – spraying, combine driving, etc. I progressed and the farm owner, my boss, wanted to take more of a back seat on different tasks on the farm, so I've now ended up managing the day-to-day running of the farm – purchasing, selling and the biggest role is managing our staff.

Staff are what make the farm work, but coming out of college I didn't have a lot of staff management skills. We had one short module, which covered the background, protocols and what's required legally when you're employing people, but nothing on how to deal with people or speak to people to get the best out of them. So the course has proved very useful so far. We're halfway through and I've been putting the skills I've learnt into practice, with great results.

Tess: Is there anything specific you've picked up from the course that's helped your business move forward?

Alex: In the past there's been a bit of trouble with staffing and the finger, quite rightly, was pointed at me due to my management style: I was quite aggressive. But all through this course, I've been learning how to portray myself more assertively, not aggressively, and engage with people when I'm talking to them, not talking at them.

I've been working hard on it and I can really see the benefit. I'm engaging with the employees an awful lot better and it's just a lot easier – they know what they're doing and I know what I'm doing.

Tess: So, communication is a lot clearer and that will obviously help the business. Can you put any value on that?

Alex: Retaining staff is the main benefit. In our sector, good machinery operators that are conscientious and willing to put in the hours are hard to come by now. There's a real shortage unfortunately. It's making sure that we retain those key people on our farms and showing them that we value them, and to treat them fairly and well.

Tess: You're obviously working hard on your own behaviour to improve your business. Is there anything else you've learnt from the course that you're yet to implement?

Alex: We've been talking about my skills so far, but we're also going to look at the skills that other people in the business have. We're doing a profile to see how their skills fit in and whether we could move people around the business to make the most out of their skills so that they're working in an area they enjoy.

Happy employees will perform well for us and want to stay with us.

Tess: Have you made any other positive changes?

Alex: My own personal time management is a lot better now than it ever was. I used to find myself at the computer at midnight, working things out for the next day. But now I'm more organised, I'm delegating more tasks and really just running things more efficiently so I can spend a lot more time with my family and friends. That's benefitting my own personal life and it's the same for any other sectors.

Tess: What's your advice for other people thinking about applying for the Professional Managers' Development Scheme?

Alex: Go for it. From the first interview, this course has been great. It's as much a social event as a training event and you learn as much outside of the presentations as you do in them.

The 14-month Professional Managers' Development Scheme has been designed to challenge and develop the skills of managers with staff management responsibilities to meet the industry's needs. Contact tess.howe@ahdb.org.uk to register your interest for the next programme.

THE FUTURE OF AGRICULTURAL COMMODITIES MARKETS

Tom Hebbert, AHDB Communications Executive

Drawing together the latest data and independent analysis on factors affecting UK farming, AHDB Horizon series' agri-market report outlook paints a mixed picture for cereals and oilseeds.

The hot weather and growers' location had the biggest impact on the production and quality of the cereals harvest in 2018. Wheat prices were strongly impacted by the high temperatures over the summer, before falling back later in the year following global currency fluctuations. Although wheat and barley production levels are behind the previous year, being a global commodity the global availability of grain throughout the coming season will also affect prices. Russia generally provides the floor for wheat prices and has been exporting large volumes. How long it can keep this pace up for remains to be seen.

Meanwhile, UK oilseed rape yields were 11% down on 2017, with soil type and region largely dictating the results. The US/China trade dispute, with US soya beans needing to find a new home largely at discounted prices, held down global oilseed prices. Expectations that current global prices will prompt increased oilseed planting have been tempered by dry weather affecting crop establishment, as well as increased instances of cabbage stem flea beetle damage due to the pest's preference for dry conditions.

Turning to consumption trends, the challenge to breakfast cereal sales from convenience products is set to continue, although opportunities remain for on-the-go breakfast products and healthier varieties of traditional lines. Meanwhile, the consumption of sandwiches has declined over the last five years and this is expected to continue, although the sandwich is still the leading lunchtime product. The industry is helping to offset this by making the most of a greater variety of seeds and ancient grains. Wider health trends have seen an increase in the consumption of healthier biscuits, driven by the desire for healthier snacks.

Turning to the other farming sectors: the extreme weather in 2018 had a substantial impact on the potato harvest, although this depended on growers' region and access to irrigation. Dairy farmgate prices are expected to come under downward pressure in the early part of 2019 as a result of the drop in market returns in late 2018. How this develops beyond March will depend on how milk production reacts to lower margins.

Pig meat production will rise, with supplies on the global market remaining stable due to declining imports and export growth.

The severe weather in 2018 made lambing hard for many and resulted in farmgate prices reaching record highs in April, before moving quickly back down in line with levels seen earlier in the year. While cattle supplies will be stable in early 2019, poor calving conditions in 2018 may affect supplies in the latter half of the year and into 2020. The contraction of breeding herds is set to continue, potentially declining as much as 2% in 2019.

GROWING FOR EXPORTS

Paul Temple runs Wold Farm, a mixed arable and beef farm, growing wheat, barley, oilseed rape, vining peas, grass leys and rye. He is the current AHDB sector chair for Cereals & Oilseeds.

We grow wheat for seed and commercially, with land not suited to producing good group 1 milling wheat but capable of producing good group 3 soft wheat. The two biofuel plants in the North East, when running, changed demand patterns and we are keeping an eye on how it will change now the plants have closed. Our variety choice, using the Recommended Lists, is determined to ensure both wide market options and good agronomic characteristics.

When the biofuel plants closed, it brought back the possible need to have an export-suitable variety. When producing seed crops like we are, you are trying to look at what will be required for sowing in 2019, harvested in 2020 and possibly not reaching the market until 2021.

When we're growing for exports, we grow fewer varieties and ensure varietal segregation. This allows more marketing options and provides more consistent testing and knowledge of what is in the store. It may not automatically lead to a higher price, but it certainly helps and reduces the problems of load testing and provides better opportunities for meeting specific market needs.

After Brexit, we'll all need to think much wider on markets, both the threats from new competition and the opportunities we will need to look for. We don't know yet what the access to our usual current EU export markets will be like, but as we look like having an exportable surplus in 2019 we have to be market-aware now.

Visit ahdb.org.uk/exports to find out more about growing for the export market.



COULD WE OPEN UP TRADE WITH CUBA?

AHDB's Exports Executive Dorit Cohen reports from meetings held at Cuba's largest food trade show as part of the AHDB Exports strategy to explore opportunities for the UK outside the EU.

Cuba is the largest importer of wheat in the Caribbean, with annual imports totalling 800,000 tonnes, used for bread and pasta flour.

The bread market accounts for the majority of Cuba's wheat imports. With Cuba's booming tourist industry – reaching its peak at 4.7 million in 2017 – bread consumption is expected to rise as consumers are introduced to an increasing range of wheat-based bread and pastry/biscuit products. Bread is becoming an added-value commodity, with the emergence of new restaurants producing their own breads.

Cuba's total annual milling capacity is around 500,000 tonnes. It is obliged to purchase wheat from Alimport – the Cuban state enterprise responsible for all wheat imports into Cuba. Alimport places monthly orders of 25,000 tonnes (two or three boats a month).

The private sector in Cuba remains limited. Therefore, contracts and other types of agreements must generally be negotiated through government departments.

The main sources of Cuba's imports are currently France, Poland, Germany, the Czech Republic and also Canada. High protein (12.5–13%) is sourced from Canada, Germany, Poland and the Czech Republic, while France supplies Cuba with the majority, if not all, of Cuba's low protein (10.5–11%) soft wheat requirement.

Alimport likes UK grain quality but is currently happy with the supply of French wheat given that it enjoys

extended credit payment terms (180–360 days). This will be a challenge for UK merchants without government assistance, and although a new UK government credit scheme has been announced, full details are not yet known at the time of compiling this report.

All World Foods – procurement agents with offices in London – imports wheat on behalf of Alimport. All World Foods is keen to diversify the supply of wheat from alternative EU origins and is much more open to import opportunities from the UK.

AHDB plans to meet All World Foods at their office in London to explore opportunities for supplying UK wheat into the Cuban market.

Bucanero, Cuba's largest beer producer, imports 15,000 tonnes of malted barley from the Czech Republic each year to produce four types of beer. Cuban consumers prefer light lagers, Pilsner-style, and Bucanero is not ready to diversify its styles of beer. Only a base malt is used, producing just three brands, of which Bucanero and Cristal beers are the most widely consumed in Cuba.

Bucanero is owned by AB Inbev, whose regional office is in the Dominican Republic. All purchasing decisions are made by AB Inbev on behalf of Bucanero, with containers being shipped to Cuba every two weeks. As with Alimport, AB Inbev is looking for 360-day payment terms.

The UK will need to explore possibilities for establishing more flexible payment terms if it is to make the most of any opportunities for trade with Cuba.

ahdb.org.uk/exports



CHANGE, CHALLENGE AND OPPORTUNITY

Allan Wilkinson, HSBC Head of AgriFoods



“My main messages are around understanding the potential for change, for challenge and also, hopefully, for opportunities.

“I think businesses are going to have to think about how they adapt, because the answers in one business will be slightly different to the answers in another.

“We must not forget that the UK industry, in farming terms, but also the whole food chain, is one of the most admired food industries in the

world. And even though we probably aren't the biggest, we are probably the food industry that's the most respected. So we mustn't forget that, either when we're talking about opening up export markets, or indeed looking after our home market.”

Allan spoke at the AHDB Global Britain conference on 17 October 2018.

Visit ahdb.org.uk/brexit for more information and analysis.

REAPING REWARDS: IN YOUR AREA

North West and Northern Ireland



Michelle Nuttall, Knowledge Exchange Manager

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MACHINERY REVIEW IN NORTHERN IRELAND

Richard Orr, host of Downpatrick Monitor Farm, recently carried out a machinery review:

In doing the process of the review, I learnt as much as I did coming out of the far end, which was very interesting.

We've got to narrow down the variety of running costs of the various machines now. It makes me think a bit more about what I'm going to do with them and how we progress. Although, in the period of time we've been doing the review we've also changed policy slightly, heading towards reduced tillage – trying to cut out some of those running costs.

There were no major surprises, other than the recommendation that we need to get rid of our sprayer because we're over-capacity. But I'd counteract that with conditions in the country. Sometimes we have to be over-mechanised – we don't have the weather windows that other farmers in the rest of the UK can work with.

I think a lot of farmers would question the figures, because in many ways, all farmers love machinery and they love to justify machinery. And as part of that – there's justifying it for your business and your farm needs but also how it affects your bottom line and whether it's sensible investment or extortionate for buying a new tractor.

There's a lot of farmers who wouldn't have any idea what it costs to run some of their machines. They'd just say, "My diesel costs me," or, "My parts cost me." But they don't take into consideration what it costs to do each job on the farm and how some subtle differences can long-term affect the running costs of the business.

**Characteristic of high-performing farms:
Set goals and budgets**



DATES FOR YOUR DIARY

Monitor Farm meetings:

- Downpatrick: 19 February 2019
- Downpatrick: 5 March 2019
- Warrington: 7 March 2019

cereals.ahdb.org.uk/monitorfarms

REAPING REWARDS: IN YOUR AREA

North East



Teresa Meadows, Knowledge Exchange Manager
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OPTIMISING OVERHEAD COSTS

Berwick farmer Richard Reed and his team definitely have the skills when it comes to welding, repairing and coaxing old machinery back to life.

But how do the finances stack up?

Being part of the Monitor Farm programme and benchmarking with the group meant he could become as expert at figures as he was at fixing.

He said: "You have to question what you're doing and do what's right for you."

In Richard's case, this means avoiding high depreciation costs by purchasing old machinery and carrying out the repairs with his team. And Richard now has the evidence that his approach works.

The strategy is flexible: Richard keeps machines that are reliable enough to get through the season but gets rid of anything that breaks down too much.

Hiring is also a valid part of Richard's plan. To reduce risk, he brings in specialist equipment and works it hard, rather than increasing the depreciation on his own machinery.

Richard plans to keep his costs down by continuing to make the most of his practical skills when he replaces his combine in the future.

**Characteristic of high-performing farms:
Minimise overhead costs**



DATES FOR YOUR DIARY

Monitor Farm meetings:

- **Saltburn: 28 February 2019**
cereals.ahdb.org.uk/monitorfarms



REAPING REWARDS: IN YOUR AREA

West and Wales



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CONTINUALLY IMPROVE PEOPLE MANAGEMENT

Hereford Monitor Farm hosts Martin Williams and Russell Price wanted to improve relations with their staff and develop their own skills in motivating their staff, in order to meet their own business strategy aims.

They wanted to improve staff retention and integration, as the departure of valuable team members not only has a knock-on effect for the rest of the team, but replacing a staff member is costly. Taking into account the loss of knowledge, use of existing employees to cover the work gap, recruiting and then training the new staff member, it can cost up to double the employee's salary.

Russell and Martin recruited Heather Wildman, an agricultural consultant from Saviour Associates, to help them improve their businesses through better employee management. Heather's key message to them was the importance of creating a culture in which the staff feel respected by and positive about their employer, and this, in turn, will reduce staff turnover.

Both Martin and Russell want to establish clear, continuous communication with their staff and have regular meetings and one-to-one discussions with them. Here they can discuss and share the business goals, with the team. This also provides the opportunity to set clear expectations about roles, responsibilities and behaviour. Martin and Russell are hoping the new approach will bring an increase in the involvement of the staff in decision-making, develop trust between the team and allow the delegation of responsibility.

During her time with Russell and Martin, Heather stressed the importance of creating a good environment for their employees. This included basics such as washing and toilet facilities, a kettle and microwave, appropriate and safe clothing and a dry building to leave wet work-wear in, as well as giving opportunities for career development, bonuses – not necessarily money-orientated, offering flexible benefits and working hours and giving recognition and praise where due.

cereals.ahdb.org.uk/hereford2017

**Characteristic of high-performing farms:
Continually improve people management**



DATES FOR YOUR DIARY

Monitor Farm meetings:

- **Bridgnorth: 20 February 2019**
- **Hereford: 8 March 2019**

cereals.ahdb.org.uk/monitorfarms



REAPING REWARDS: IN YOUR AREA

South West



Philip Dolbear, Knowledge Exchange Manager

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SPECIALISING FOR BUSINESS SUCCESS

One of the eight factors of high-performing farms is specialising. It means people in the farm business can concentrate on doing the same task and, therefore, get better at it. That, in turn, makes the task efficient and reliable.

Father and daughter team James and Georgie Cossins run a mixed farm business including both dairy and beef herds and also own a successful pub and butchery.

Farming at Tarrant Rawston in Dorset, they also host the Blandford Monitor Farm.

The family business began as a mixed farm and in 1993 they bought a local pub which they knew was doing well.

While running the pub, they found it hard to source a consistent supply of local meat. The Cossins' answer was to open a butchery in a redundant dairy building and hire a full-time butcher and part-time assistant.

Each enterprise is managed by different people, who have a greater understanding of the individual enterprise, rather than being spread too thinly over the whole business.

This also means that James doesn't have to lose sight of the core business.

"You still need to be timely in the arable business," he said, "and attention to detail is important in the dairy."

Even within the arable part of the business, staff tend to specialise, for example focusing on drilling or spraying.

James has a lot of trust in his staff, which means that this specialising tactic works well. Even when he's away from the farm, he knows things will be dealt with properly.

Ultimately, the family spreads risk by having different enterprises within the farm business, run by staff with specialisms.

Characteristic of high-performing farms:
Specialise



DATES FOR YOUR DIARY

Monitor Farm meetings:

- **Malmesbury: 4 March 2019**
- **Blandford: 6 March 2019**
- **Truro: 7 March 2019**
- **Taunton: 13 March 2019**

cereals.ahdb.org.uk/monitorfarms



REAPING REWARDS: IN YOUR AREA

South East



Paul Hill, Knowledge Exchange Manager
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UNDERSTANDING THE MARKET

Mark Bowsher Gibbs, G. H. Dean, Sittingbourne Monitor Farm, gave us his thoughts on grain marketing:

Our grain is marketed in thirds throughout the year because we are responsible to a body of shareholders, so we obviously can't market the grain ad hoc. We split it into 33% before the crop is harvested, 33% between August and Christmas and the remaining 33% gets marketed after Christmas.

That way we can play into the markets to an extent, but we have some protection from extreme movements.

For my market information, I liaise closely with a risk management company, which gives regular market updates and strategy advice. I access market information – tweets and emails – probably twice a week at least. If I see anything of note, then I make a phone call to discuss it further. It's fairly constant, actually.

I'd like to have more information on the activity at our local ports, like Sheerness. When you're in the South East, you're fairly limited to the markets and what you want to do is avoid having to ship your products up to the north of the country. So, it would be useful to know what consignments are being exported from the South-Eastern county coastline – that's quite interesting for us.

Average wheat prices in the last few years? There's been quite a shift in wheat price. We've missed out on the highs of about £180/tonne in August 2018, but even then, those prices are quite a jump on the £120/£130 we've seen in the last few years.

Peas and beans have been quite variable this year (2018). We're selling into markets that are £225–£240 for peas and £220 for beans, whereas last year we were down at £150–£160. Peas are always likely to vary more because of the waste and stain. This year, we had an excellent colour to the peas, so they commanded a full premium, whereas last year there was a fair amount of bleaching because we didn't get to them soon enough. So, obviously, you've got the quality of the product to consider, as well as the market.

cereals.ahdb.org.uk/sittingbourne

Characteristic of high-performing farms:
Understand the market



DATES FOR YOUR DIARY

Monitor Farm meetings:

- **Sittingbourne: 19 February 2019**
- **Basingstoke: 27 February 2019**

cereals.ahdb.org.uk/monitorfarms



REAPING REWARDS: IN YOUR AREA

East Anglia



Teresa Meadows, Knowledge Exchange Manager

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COMPARE YOURSELF WITH OTHERS AND GATHER INFORMATION

Mother and son team Christy and Hew Willett of Howard and Daughter Ltd (Chelmsford Monitor Farm) used Farmbench and discussion groups to improve their business efficiency and productivity.

Firstly, they have the tools to make rational business decisions.

When the Beast from the East in 2018 brought with it a long, cold, delayed spring, detailed cost information allowed the Willetts to think carefully about drilling spring beans.

Christy said: "I think Hew made the actual decision not to drill, because he knew what yield he needed to achieve and he knew the cost of production for those beans. It was a bold move and I probably wouldn't have taken it, but Hew did."

They planted a cover crop of phacelia instead of drilling the spring beans.

"It's been improving the soil and has been full of insect life. We didn't make money on that land, but we haven't lost money on it either and it should be in good condition going forward.

"A lot of people who did plant beans have been disappointed by their yields and said to me: 'Actually, you made the right decision.'"

Secondly, Hew and Christy have used information from benchmarking to change the way they manage their labour.

"It's interesting to hear Hew being so ruthless about the bottom line," Christy said, "because I know that I have been guilty of taking my eye off that ball.

"When you've got staff, you want to keep them gainfully employed and that can make you do things that you've traditionally always done. But, actually, we need to be more flexible. For example, if it's not worth putting a crop into the ground, then what are you going to do with that person's time? Get creative, do something else. Go contract fencing or something.

"You don't have to be rigid in your farm policy," Christy said. "Be light on your feet."

cereals.ahdb.org.uk/chelmsford

**Characteristic of high-performing farms:
Compare yourself with others and
gather information**



DATES FOR YOUR DIARY

Monitor Farm meetings:

- **Dereham: 5 March 2019**
- **Duxford: 7 June 2019**
- **Chelmsford: 21 June 2019**

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REAPING REWARDS: IN YOUR AREA

East Midlands



Judith Stafford, Knowledge Exchange Manager
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A MINDSET FOR CHANGE AND INNOVATION

Newark Monitor Farm host John Miller aims to achieve two things: a reduction in costs with a simplified establishment system and a reduction in soil disturbance for improved soil health.

Since beginning the Monitor Farm journey in 2016, John has experimented with no-till. Using a disc-based no-till drill on his heavy land resulted in a 0.5 t/ha yield decrease compared with his usual establishment method. However, determined to carry on learning and trying out new ideas, he's looking into trying a Cross-Slot drill to avoid the yield reduction some experience from zero-till sowing.

"I like to keep farming interesting," he said. "I have an inquisitive mind."

By learning from others in the Monitor Farm group and with his own keen attention to detail, he's managed to achieve some success by reducing cultivation depth as a step towards stopping cultivation completely.

Using a wider, shallower cultivator this autumn, he's reduced his wheat establishment costs from £95.60/ha to £84.74/ha, a saving of £6,000 a year on 500 ha, and this has resulted in 22% fewer hours worked over the autumn period compared with last year.

Next, John wants to focus even more on his soil health, particularly soil biology.

"Know where you want to be and keep trying, keep learning and keep going," he said.

Characteristic of high-performing farms:
Have a mindset for change and innovation



DATES FOR YOUR DIARY

Monitor Farm meetings:

- Newark: 13 February 2019
- Brigg: 21 February 2019
- Northampton: 21 May 2019

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REAPING REWARDS: IN YOUR AREA

Scotland



Claire Hodge, Senior Knowledge Exchange Manager
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FOCUS ON DETAIL

For David Fuller-Shapcott, whose family has farmed at Sweethope Farm, near Kelso, since 1988, attention to detail has always been the overriding factor in his farm management.

He said: "I think it's important to look at every aspect of your farm business and work out where you can make those small improvements. On their own they may seem minor, but together they can make a big difference to your bottom line."

For David, this attention to detail starts with the soil, and a key management change has been drastically reducing the amount of ploughing on farm and moving largely to a min-till system.

"It's not easy switching to a min-till system, it's challenging to get it right, you need the right cultivator for your soil type and it takes time to learn to keep the number of passes down, but it is worth it if you persevere."

Switching to min-till has allowed David to reduce his inputs and his labour time, while still maintaining impressive yields.

Not content to merely push the boundaries of crop cultivation, David also hosts a number of industry and academic trials on Sweethope. This year, for example, he has been comparing different fungicide programmes as part of the BASF Real Results Circle and working with ADAS on how a new liquid fertiliser would affect tiller numbers.

"The best thing about being involved in all these trials is that you get up-to-date, relevant information on technical best practice for your farm.

"I know how certain products or techniques performed here at Sweethope, not miles away under different conditions, and I can use what I've learned to adapt what I am doing on farm to make sure I am as productive and profitable as possible.

"When it comes to farming, I really believe every day is a school day."

Characteristic of high-performing farms:
Focus on detail



DATES FOR YOUR DIARY

Monitor Farm meetings:

- **Lothians: 27 February 2019**
- **Angus: 28 February 2019**
- **Shetland: 2 March 2019**
- **Borders: 6 March 2019**

monitorfarms.co.uk

ARABLE CONNECTIONS

With a move towards more regional-focused information, we've worked with several organisations to add value to their summer open events.

AHDB Arable Connections will feature at several events around the UK to provide advice and information on how growers can overcome technical and economic challenges to their business.

Variety tours and demonstrations will be available at many of the summer events, with variety expertise provided by AHDB or our partners.

- ADAS, Hereford: 18 June 2019
- NIAB, Sutton Scotney: 18 June 2019
- NIAB, Morley: 20 June 2019
- Elsoms, Spalding: 25 June 2019
- AFBI, Northern Ireland: 25 June 2019
- Pearce Seeds, Sturminster Newton: 27 June 2019
- NIAB, Croft: 27 June 2019
- JHI/SRUC, Dundee: 2 July 2019
- Saaten Union, Cowlinge, Suffolk: 4 July 2019

cereals.ahdb.org.uk/arableconnections

MONITORING CHANGES IN PATHOGEN VIRULENCE

The UK Cereal Pathogen Virulence Survey (UKCPVS) identifies new races of pathogens capable of causing disease on previously resistant cereal varieties.

Targeted at breeders, crop scientists and technical agronomists, the annual stakeholder event reports on recent seedling test results and adult plant nursery tests.

The next event takes place on 6 March 2019 at PGRO in Peterborough.

ahdb.org.uk/ukcpvs

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