

The background of the entire page is a photograph of a large industrial grain storage facility. A person wearing a white protective suit and a white face mask is kneeling on a large, conical pile of golden-brown grain. The person is holding a long, thin metal rod or probe, which is inserted into the grain. The warehouse has a high ceiling with a complex network of dark metal beams and skylights. The lighting is dramatic, with some areas in shadow and others brightly lit by the skylights. The overall tone is professional and industrial.

# Delivering the future of farming

## Your levy in action

Cereals & Oilseeds sector plan  
2022–2027

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“Almost all aspects of our commercial and politically independent work are valuable”

Stephen Briggs



# A word from the sector council chair

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The grains and oilseeds we produce form the basis of a balanced diet, provide renewable fuel, feed livestock and support the UK's food security.

As an industry, we are proud to produce these benefits, while maintaining a diverse and valued countryside – all delivered against a highly volatile marketplace.

In May, you used your Shape the Future vote to tell us two important things: that almost all aspects of our commercial and politically independent work are valuable and that the effectiveness of activities must be improved.

Our future work will be organised into three themes:

1. Trusted variety and product testing.
2. Independent, practical research and market intelligence.
3. Work across the supply chain.

You will see some specific improvements to how we deliver work in the future. As an example, we need to create Recommended Lists (RL) that meet the needs of the modern industry. We will evolve the RL through a far more extensive review than anything we've undertaken before.

We also need to re-engage farmers in the research decisions we make. This means we'll explore how best to re-establish farmer-led decision-making on what research is funded and change our research to create solutions at a farm system level.

A focus on maximising value in the supply chain is also vital. Any work undertaken in this area must benefit all groups of levy payers. We also want to improve how AHDB engages with you.

We recognise that we need to be agile and flexible as the world changes. Throughout the life of this plan, we will listen to your feedback and adapt our priorities to respond to the challenges you face.

This plan is the beginning of a conversation. We want to hear your views so that we can represent you and the industry fairly and deliver what's needed with confidence. We look forward to hearing from you.

## **Stephen Briggs**

Interim Chair, Cereals & Oilseeds Sector Council

### **Purpose of the levy**

The levy empowers all levy payers to act together to tackle challenges and opportunities that cannot, or will not, be addressed by individuals or commercial organisations alone.



# The five-year plan

## Trusted variety and product testing

AHDB's Recommended Lists, which gives levy payers the opportunity to compare varieties on an independent, consistent and fair basis, was ranked as the most important work that we fund.

To test which product or variety will consistently deliver requires a large-scale investment to fund a robust and controlled approach. This is not possible for an individual, and a trial-and-error approach can be avoided by levy funding such work.

The aim of this work is that you can make informed selection decisions that lead to increased profitability and sustainability on your farm.

To measure our success, we will monitor how many are using the tools provided and how you rate them.

AHDB will:

- Keep Recommended Lists up to date and undertake a major review to improve them. We will look at how many varieties are tested and the consistency of performance and margin under a wider range of commercial conditions, for example, more typical fungicide usage, or lower fertiliser regimes
- Improve our fungicide performance research to make it more accessible to levy payers and agronomists, and consider new ways of funding it
- Trial other commercial products and methods, particularly innovative new ones where there is clear levy payer demand. This could include products such as micronutrients and biostimulants

# Independent, practical research and market intelligence

This work will provide you with independent, robust answers to your questions to help improve your profitability and sustainability. It will also protect and promote the industry's reputation.

To measure our success, we will monitor the number of people accessing the information and ask you to rate how useful it is.

There are three parts to this work, and we will join up the very best research, data and evidence from around the world to deliver them.

## Take a systems approach to research

As the sector shifts from a chemistry focus towards a balance of physics, biology and chemistry, each farm will need to find that optimum mix. Therefore, the AHDB team will move research from solving single issues to addressing whole farming systems.

AHDB will:

- Identify practical ways of countering rising input costs by identifying improvements in holistic soil management, nutrient recycling, organic manures and composts
- Improve RB209 as this is a critical tool for your nutrient management and informs government policies. This means ensuring it is up to date with the latest research and linking it to soil management methods where applicable
- Provide robust independent Integrated Pest Management information to reduce reliance on plant protection products

- Work with levy payers to better evaluate the economic, environmental and business impacts of changing enterprise and cropping balances within farming systems, for example, more cover crops or environmental management
- Continue to bring you the latest research and facilitate your peer-to-peer learning through Monitor and Strategic Farms

## Provide independent market intelligence

AHDB's independent market intelligence service is widely used and scored well in the Shape the Future vote. AHDB will continue to evolve the information it provides, for example, we will analyse new and emerging markets for cereals and oilseeds growers and dial down work in other areas where there is now less need for analysis.

The sector council has asked AHDB to:

- Provide core data and prices for the whole supply chain that others do not, along with concise analysis of the key issues affecting levy payers
- Analyse emerging carbon and biodiversity markets
- Combine farm costs data with market intelligence to address topical issues, such as the impact of fertiliser prices on profit margins

## Focus on gaps in environment work

Levy payers gave work related to the environment a relatively low score. However, we know that it is a subject of great importance to consumers and therefore AHDB will do some limited work to:

- Focus on knowledge gaps where answers are most urgent and will not be provided by others
- Develop a Cereals & Oilseeds roadmap with industry, to protect and promote the reputation of the sector with consumers and government
- Work with industry and government on standardising approaches to environmental measurement

# Work across the supply chain

As an independent, commercially and politically unbiased body, AHDB is uniquely placed to bring the industry together and facilitate pre-competitive discussions to benefit all levy payers.

The aim of this work is that where there is significant benefit to levy payers from the supply chain working together, the supply chain does so effectively and efficiently.

To measure our success, we will share with you the outcome of the workstreams set out below.

AHDB will:

- Consider the need to modernise grain passports by discussing the benefits to levy payers of a digital version of the current paper system. If it delivers benefit to all groups of levy payers, AHDB will consider implementing the system
- Educate schoolchildren and students, by working with partners, to ensure they are informed about nutrition, where food comes from and how to cook, so they foster a positive attitude toward food and the UK farms it comes from
- Defend the industry from unfair criticism in the media by collaborating across the industry to respond on matters such as gene editing, inorganic fertiliser and plant protection product use
- Support export market access by continuing to maintain access in existing markets (for example, in North Africa) and develop new markets where needed (for example, exporting barley to China) to support you in achieving the best margin possible
- Represent the views of all levy payers, using data and evidence, for example, to support how assurance schemes could operate to maximise value for all

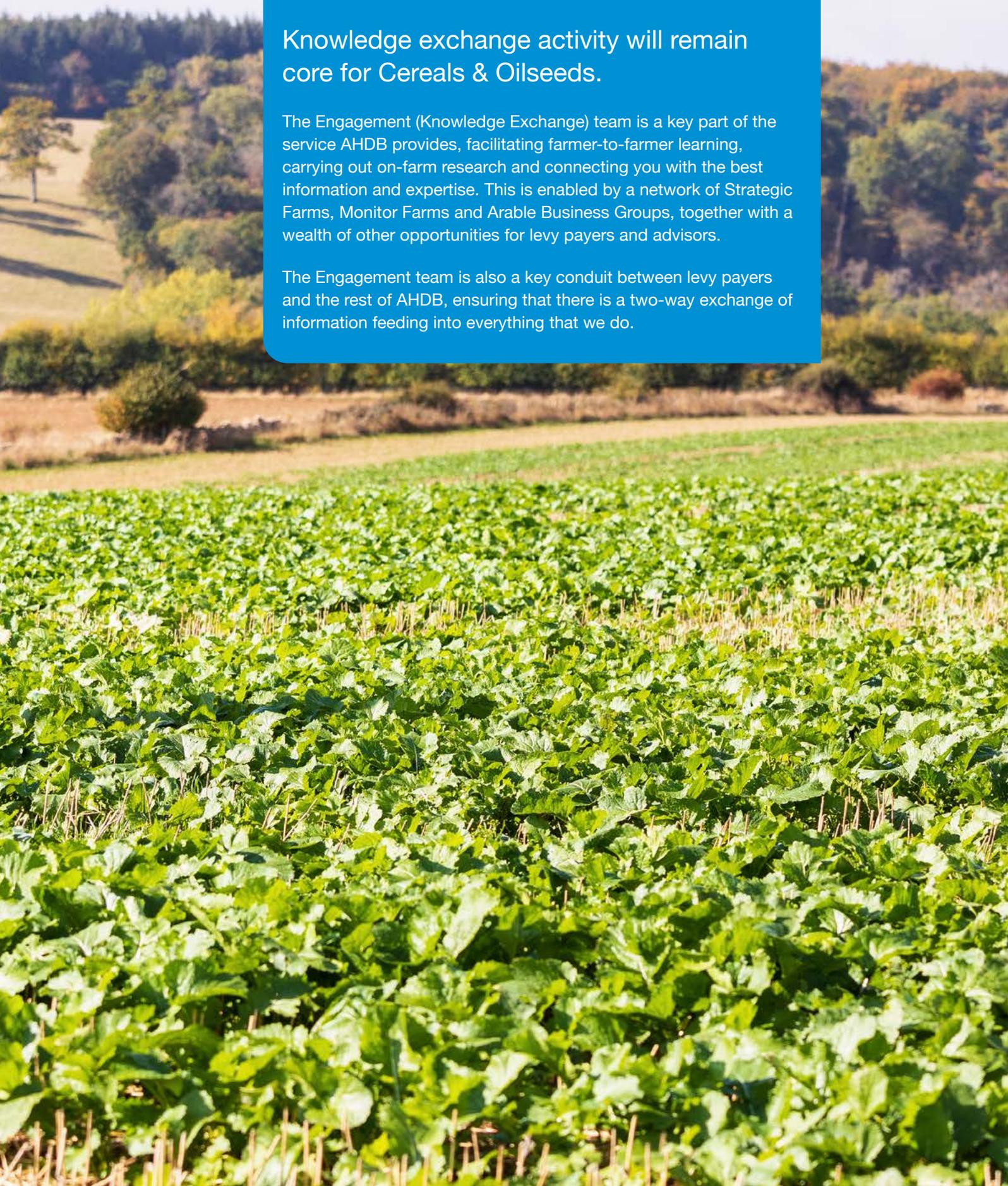


## Knowledge exchange

Knowledge exchange activity will remain core for Cereals & Oilseeds.

The Engagement (Knowledge Exchange) team is a key part of the service AHDB provides, facilitating farmer-to-farmer learning, carrying out on-farm research and connecting you with the best information and expertise. This is enabled by a network of Strategic Farms, Monitor Farms and Arable Business Groups, together with a wealth of other opportunities for levy payers and advisors.

The Engagement team is also a key conduit between levy payers and the rest of AHDB, ensuring that there is a two-way exchange of information feeding into everything that we do.



# Shape the Future voting results

In April and May 2022, we carried out the first step in delivering our promise to put you at the heart of everything we do.

Levy payers were asked to score on a 1 to 5 scale which areas of work were the most important to them.

<b>4.2</b>	Recommended Lists
<b>4.0</b>	Education
<b>3.9</b>	Market intelligence
<b>3.9</b>	Reputation
<b>3.9</b>	Integrated Pest Management
<b>3.9</b>	Nutrient management (RB209)
<b>3.9</b>	Exports
<b>3.6</b>	BPS
<b>3.6</b>	Environment
<b>3.6</b>	People working in agriculture
<b>3.3</b>	Grain Passport

Scale: 5 high (important) – 1 low (less important)

Highest



Lowest

The sector council also received around 300 comments. The most common comments were about farm assurance. Others urged an increased focus on regenerative practices and development of the Recommended Lists and RB209. Many wanted to see improvements to the way AHDB communicated both to the industry and government.



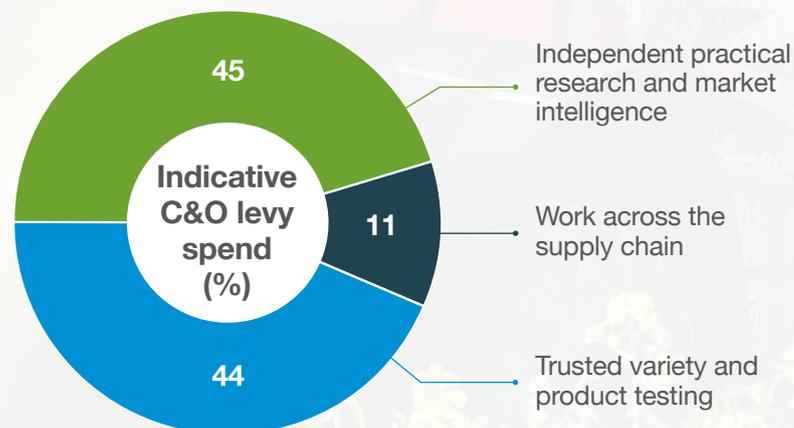
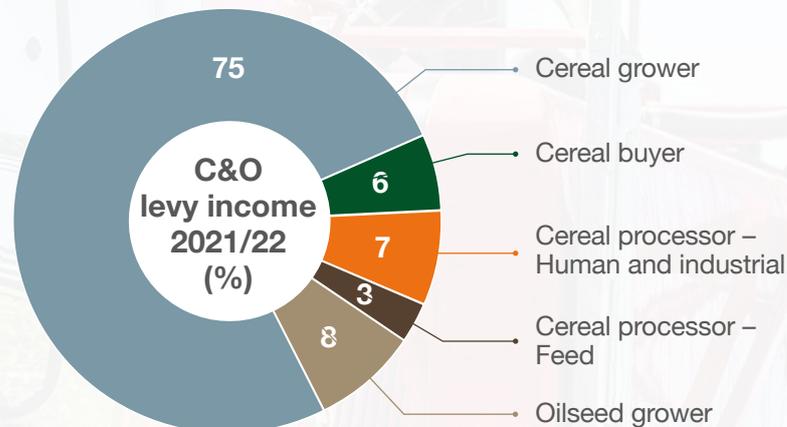
# Your sector council's comments on the results

The sector council considered all the views expressed in the Shape the Future vote, alongside the available funds and the challenges and opportunities for the sector.

As there was strong support for all AHDB services and a request to make improvements rather than stop services, the sector council also discussed the levy rate.

Although the sector council will look after every penny and drive for value at all times, the levy has stayed the same since 2011 and is effectively reducing each year as inflation, changes in AHDB's VAT status, and HGCA pension liabilities all have an impact.

If levy payers wish to continue to receive the current services, then we will need to increase the levy in the future and we will discuss that with the industry.



# Work reducing or stopping following the vote

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As a result of the vote, and the need to focus spend where you told us you got the most value, AHDB will discontinue work where there is duplication with others.

For example, The Institute for Agriculture and Horticulture (TIAH) was established by Defra in 2021 to support people and skills in agriculture, so we will stop work in this area. However, we will continue to monitor this area to ensure that no significant need remains, including in Wales, Scotland and Northern Ireland.

## Your council – next steps and contacting us

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Your council represents all types of levy payers and makes decisions on your behalf. Members are appointed to the council following ratification by your votes.

Each year we will report on where we have spent your money and what has been achieved. You will also be given the opportunity to ask your sector council members questions about the team's work, both online and at face-to-face events.

To receive regular updates, register now to stay in touch at [ahdb.org.uk/keeping-in-touch](https://ahdb.org.uk/keeping-in-touch)

### Keep talking

We want to continue to engage with levy payers. We encourage contact with the local Engagement team member or sector council member. Contact details can be found below:

Contact the Engagement team via  
[ahdb.org.uk/cereals-engagement-team](https://ahdb.org.uk/cereals-engagement-team)

Contact a sector council member at  
[ahdb.org.uk/cereals-oilseeds-council](https://ahdb.org.uk/cereals-oilseeds-council)

For all other enquiries, email us at [info@ahdb.org.uk](mailto:info@ahdb.org.uk)

# Who's who in your sector council 2022



**Stephen Briggs**

Interim Chair of Cereals & Oilseeds Sector Council, farmer, farm business consultant, Nuffield Scholar, Cambridgeshire



**David Bell**

Mixed arable and beef farmer, Director of SRUC, Director of Scottish Quality Crops, Chair of Voluntary Initiative in Scotland, East Fife



**Tony Bell**

Arable farmer, former director of an animal feed business, North Yorkshire



**Tom Clarke**

Nature-friendly farmer, NFU Sugar Board member, The Cambridgeshire Fens



**Polly Davies**

Mixed organic tenant farmer, South Wales



**Julius Deane**

Wheat Director at Carr's Flour Mills Ltd, global grain trader, Carlisle



**Russell McKenzie**

Farm manager, Nuffield Scholar, advisor, Cambridgeshire/Bedfordshire



**Sarah Nightingale**

Agri-food industry market and policy analyst and lobbyist, consultant, Hampshire



**Cecilia Pryce**

Head of Compliance, Shipping and Research at Openfield, Lincolnshire



**James Standen**

Farms Director for Newcastle University Farms, Partner F&J Standen, Newcastle-upon-Tyne



**Patrick Stephenson**

Independent agronomist, former AICC Chair, founder member Global Alliance of Independent Agricultural Consultants, North Yorkshire



**David Walston**

Farmer, conservationist, Nuffield Scholar, Cambridgeshire

Produced for you, on behalf of the  
Cereals & Oilseeds Sector Council, by:

**AHDB**

Stoneleigh Park  
Kenilworth  
Warwickshire  
CV8 2TL

**T** 024 7669 2051

**E** [comms@ahdb.org.uk](mailto:comms@ahdb.org.uk)

**W** [ahdb.org.uk](http://ahdb.org.uk)

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