



**GROUND**ED  
RESEARCH

## Membership Survey

# AIC

Understanding levels of engagement among AIC members, the opportunities for improvement and the challenges they identify in the sector.

**PREPARED BY :**

Jan England , Clare  
Otridge & Claire Bennett-  
Madge

**October 2024**

## Contents

Background.....	3
Key Findings .....	3
Recommendations .....	10
The Engagement Process.....	12
Respondent Profile .....	15
Sector .....	15
Employees/Size of Company.....	16
Question by Question Analysis .....	17
Question 4: Please share some unprompted thoughts about AIC, how they support your business, their wider activity, and how they represent your interests.....	17
Question 5: Thinking of your overall experience of AIC, on a scale of 1-10 how likely are you to recommend membership to someone else in your position? .....	19
Question 6: How aware are you of the following AIC work? .....	20
Question 7/8: How important are Services Provided by AIC to Your Company?.....	22
Question 9: How effective are Services Provided By AIC? .....	24
Question 12: Please explain briefly what difference AIC has made to your overall business performance, or what has been the added value from your AIC membership? .....	29
Q13: Please rate the challenges identified as facing the industry based on the impact you believe they will have on your business in the next 1-3 years.....	31
Question 15: What can AIC do to support you in overcoming some of the greatest challenges?.....	35
Question 16: Sustainability Practices.....	38
Question 17: Key barriers to implementing sustainability practices .....	39
Question 18: Top sustainability priorities for next 5 years.....	40
Question 19: How confident do you feel in the new UK government’s policies aligning to the needs of your business?.....	41
Question 20: How would you rate AIC’s strength in communicating the challenges your business faces at government level? .....	43
Question 22: AIC lobbying of government on your behalf. ....	44
Question 24: Communication with AIC .....	48

Negative feedback for reference ..... 52

Annex 1: Full comments in response to the open question asking for thoughts on AIC  
..... 53

Annex 2: Full responses to the question about the Government..... 56

Appendix 1:..... 60

Questionnaire Template ..... 60

## Background

The Agricultural Industries Confederation (AIC) have undertaken regular membership satisfaction surveys. In 2017 England Marketing (now Grounded Research) undertook an online survey on behalf of AIC, this was repeated as a telephone survey in 2020 by Marketing Innovation. In 2024, AIC commissioned Grounded Research to undertake the most recent membership survey.

Due to feedback on the length of calls previously, the nature of the questions and the availability of senior Members the 2024 survey was undertaken using a hybrid approach allowing Members to respond either wholly online, wholly on the phone or a hybrid of the two depending on their preferences. In addition, the research team made outbound calls to non-responsive Members

In addition to the continuity questions on membership satisfaction, additional questions around industry challenges, political landscape and sustainability were included to replace those from the previous survey that were focused on Brexit.

A copy of the questionnaire is to be found at Appendix 1.

## Key Findings

Representation across the membership base was covered from each sector, turnover and number of employees. The sample of those who responded was too small to be able to draw conclusions by sector, but the depth of information shared by those that did respond was sufficient to provide clear findings and recommendations.

A summary of the key findings are given below

### **Service Awareness**

The services provided by AIC that were identified as most important to Members are generally the ones they are most aware of;

1. Representing Members' interests with UK policymakers
2. Working with and advising industry bodies
3. Information and guidance to Members on legislation
4. Sector committees and working groups
5. Managing trade assurance schemes

The below services are known about (to a greater or lesser extent) but have been classified by Members as being of less importance:

1. Technical support through training seminars and online training
2. Discounted contracts and arbitration service
3. Business Support
4. Managing the Feed Adviser Register
5. An Annual AIC Dinner and Conference

## **Communication**

In terms of communication from AIC, in person meetings and member briefing emails were most highly rated. It was found that some Members perceived that emails were not streamed by sector and too frequent. Member briefing emails are streamed by sector and some general member briefings are also sent to the membership. We are aware that AIC reports a lot of information and getting the balance right between too much and too little in a very fine line. A factor that emerged in undertaking the research has been that the larger companies and those companies who have staff involved in sector committees and working groups are much more engaged with the AIC activity overall and are more likely to rate all aspects of their membership in a positive light. Some of the smaller companies who have less direct involvement tend to feel sidelined and see AIC in a less favourable light.

## **External Impacts**

A few Members feel that as AIC represents a broader member base across the whole supply chain, from crop production through to food manufacturing and should engage to a greater extent with other trade bodies.

The major challenges faced by Members currently are policy and regulation and Net Zero, food security, land use strategy and International Trade Agreements. This is slightly different to 2020 where Brexit was the major challenge at the time, with sustainability, climate change and government regulations and legislation featuring then. Brexit was not listed in 2024 although some of the Members are still facing issues with withdrawal from the European Union and these are addressed in the main report.

Members were asked about their activity in sustainability and which issues they have addressed and what they plan over the next five years. Recently, the main focus has been on creating a carbon reduction plan and developing metrics to measure sustainability as well as trying to reduce waste and recycle more. For the next five years, the majority of respondents are looking at continually improving energy efficiency and reducing energy consumption as a major focus, probably as a result of increasing energy costs. They also remained focused on reducing carbon and developing sustainability metrics.

Currently, Members do not have very much trust or faith in the new government, providing an average rating of just 3.64 out of 10. We have provided an in-depth analysis of why the government has a low rating.

In terms of how AIC are communicating with government in terms of lobbying and raising the profile of the agri-food sector, Members gave an average score of 6.79 out of 10. Whilst more could be done, Members feel that AIC are trying hard to represent the industry. For context we have explored areas for improvement.

Several of those interviewed said that AIC has a role to play in engaging externally with Members of the public to raise awareness of the agri-food industry and garner support from the public to ensure that Government is listening. There is an opportunity to do this through social media as people are interested and engaged in detail about how food is produced and food security to a much greater extent than they have been in the past.

### **Comparison to previous years**

This is the third annual AIC membership survey, the previous surveys having been conducted in 2017 and 2020. It is difficult to draw many comparisons from the findings because the uptake by Members in the current survey is low (117 in 2020 and 153 in 2017) although some key trends can be identified. Of the Members surveyed, they continue to highly value the areas lobbying, legislative guidance, advising industry bodies, working as sector committees and managing trade assurance schemes. Less important areas to Members are the areas of contracts, AIC Conference, Business Support and the Feed Adviser Register.

It is also apparent across all three surveys that of the Members that took the survey in person interviews and member briefings remain very popular and receive positive feedback.

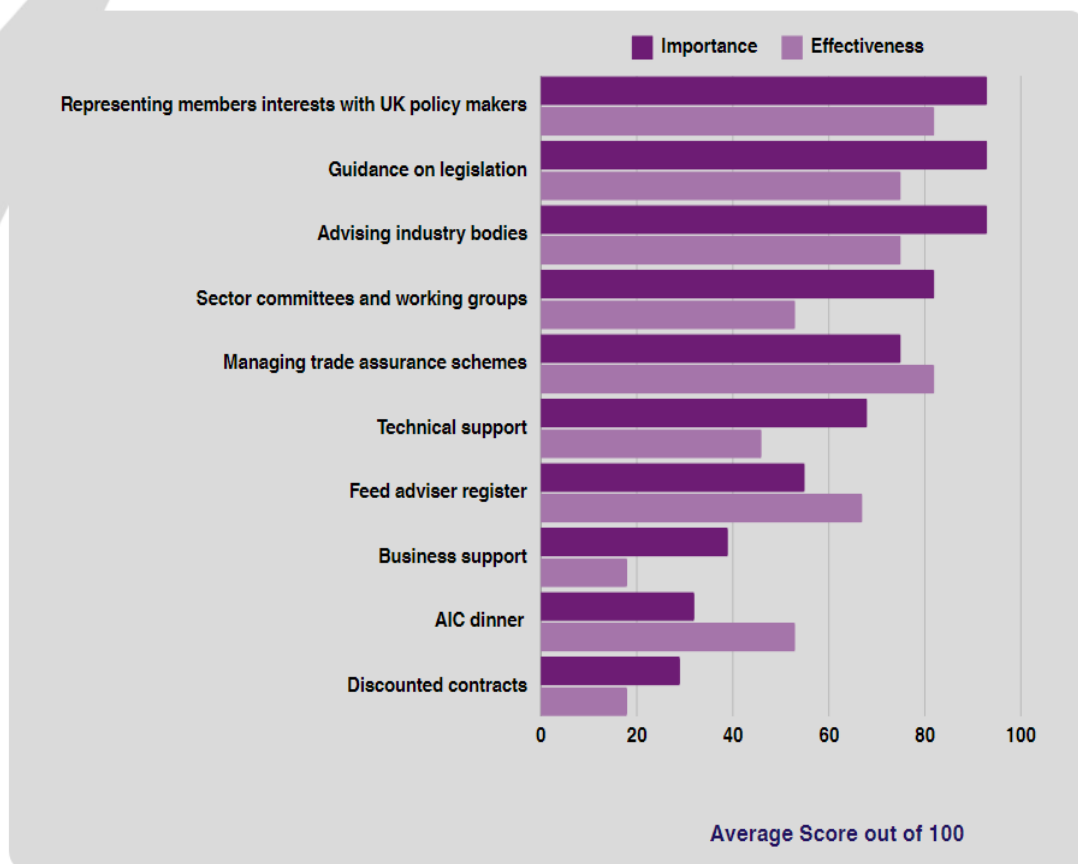
The other common theme from the three surveys is that some smaller companies still feel disadvantaged in the benefits they glean from AIC. In general, larger companies are more likely to be involved in direct sector engagement than smaller companies. A general trend is the requirement for regional briefings/meetings to support smaller companies which would reduce travel costs for Members.

However, webinars and teams/zoom meetings can be used to overcome some of these engagement issues as Members can join from anywhere in the world both large, medium and small.

## Key Insights – Graphical Representation

# Member Survey Internal Findings

## Most important services AIC offers and their effectiveness



# Member Survey Internal Findings

## AIC Communications

Members value the quality content and information provided by AIC. In person meetings and regular newsletters score highly with scope to see more value in online communication channels in the future.



In-Person Meetings



Member Briefing Emails



Assurance Scheme Newsletters



Events

## NPS Score



**+50**

## AIC Support

Support requirements from members:

1. Lobbying and policy advocacy
2. Sustainability guidance
3. Information sharing
4. Workforce support
5. Trade and market access
6. Regulatory simplification
7. Crisis management

## AIC Influence

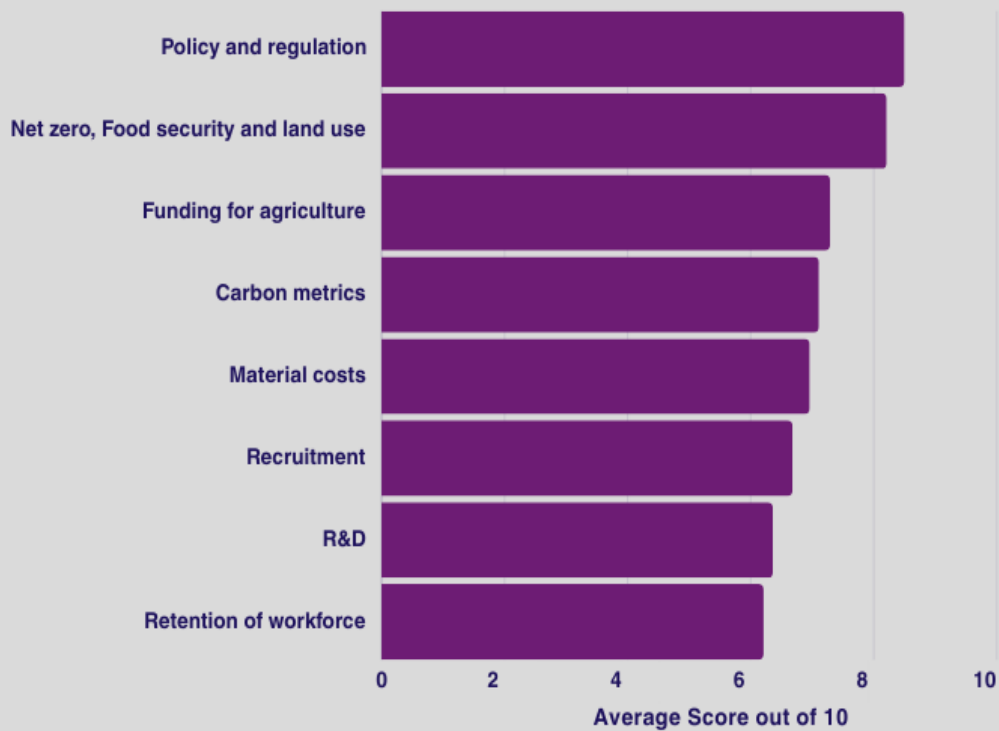
**8/10**

Most frequent score for effectiveness in communicating industry challenges to government

# Member Survey External Impacts

## Importance of Challenges

Eight key challenges facing the sector in the next 1-3 years were scored and ranked by most to least challenging.



# Member Survey External Impacts

## Top Sustainability Priorities

The next five year's top five sustainability priorities were identified and ranked by members.



Improving energy efficiency and reducing consumption



Developing sustainability metrics



Assessing environmental impacts



Reducing waste and landfill



Carbon neutrality

## Top 5 Sustainability Practices

1. Reduce waste and recycling
2. Carbon reduction plan
3. Sustainability metrics reporting
4. Premises
5. Reducing greenhouse gases

## Sustainability Barriers

The five biggest barriers to achieving sustainability goals for member organisations.

Financial constraints

Regulatory challenges

Resource constraints

Lack of infrastructure

Demand

# Recommendations

The following recommendations stem from some of the key findings of report based on the Member feedback obtained. However, it is recognised that AIC are in a strong industry leadership positions with respect to lobbying the UK Government, however, refinements in this area and Member engagement can also be made.

## 1. Engagement with Smaller Companies

- a. Expand Outreach to Smaller Members: Recognising that some smaller companies often feel their influence is limited compared to larger members, AIC should proactively engage these businesses. This could include targeted sessions or virtual roundtables to provide opportunities for their voices to be heard.
- b. Broaden Committee Reach: Establish advisory roles or consultation groups specifically for smaller companies that are not represented on existing committees. This will ensure a more inclusive approach and increase the perceived value of membership.

## 2. Enhanced CRM Communication Strategies

- a. Increase Awareness of Communication Preference Centre: Improve the visibility of the preference centre, enabling Members to adjust their communication preferences and receive only the most relevant updates.
- b. Define Communication Leads: Designate both an administrative and executive lead within each Member organisation to ensure communications are properly directed, minimising the risk of key messages being overlooked.
- c. Leverage CRM Capabilities for Targeted Workflows: Implement CRM workflows that send targeted, automated messages to improve engagement. Examples include:
  - Unread Message Reminder: For Members who have left multiple messages unread, send an email prompting them to update their preferences in the centre.
  - Interest-Based Follow-Ups: Where a Member has clicked on a specific article or event link, follow up with related content or event invitations.

## 3. Enhanced Member Feedback Mechanisms and engagement

- a. Centralised Feedback Collection: Set up a feedback form allowing Members to provide insights on communications and other areas. Staff should also have the ability to input feedback on behalf of Members who contact them directly. This would facilitate trend analysis, helping AIC address recurring themes and improve engagement.

- b. Develop an ongoing programme of Member calls with the Policy team with Members to check-in with member companies. Information gained should be added to the CRM.

#### **4. Reinforce Sector-Specific and Streamlined Communications**

- c. Sector-Based Email Briefings: Encourage individuals within Member companies to select their preference Member emails to reduce information overload and deliver more focused, relevant updates.
- d. Expand Contact Distribution: Where there are gaps, ensure key communications are sent to more than one contact within each member organisation, especially to senior managers and directors, to improve the likelihood that messages reach the appropriate recipients.

#### **5. Public and Stakeholder Engagement**

- a. Enhance Government Lobbying: Deepen AIC's relationships with policymakers and key stakeholders to strengthen the organisation's ability to represent Members' interests effectively at government level. A gap analysis may help within this area
- b. Strengthen Partnerships with Other Trade Bodies More Visibly: Collaborate more closely with trade bodies such as NFU, FDF, and AHDB to present a unified industry front, especially on issues of shared significance.
- c. Build Public Engagement: Increase efforts to engage the wider public through social media, highlighting AIC's activities and the value of the agri-food sector. This would help foster public understanding and support, increasing AIC's influence on behalf of Members.

## The Engagement Process

Of the 162 Members for whom details were supplied, responses were achieved from 48 organisations. A total of 28 surveys were completed. An additional 9 claimed were too busy to take part and a further 11 provided some brief but quite negative feedback.

9 dropped out of the selector and did not progress but no reasons have been provided despite attempting to chase the contacts. 4 have a policy of not doing surveys. 5 booked a time but never showed up (1 twice). We have continued to follow up with 117 and have made 365 attempted calls in total and sent 50+ additional emails apart from the 4 emails people received inviting them to take part, and then reminding them to complete the survey.

### The automated emails were sent on the following dates:

8<sup>th</sup> August - First invitation

21<sup>st</sup> August - Second invitation (to those who had not responded)

28<sup>th</sup> August - Third invitation (to those who had not responded)

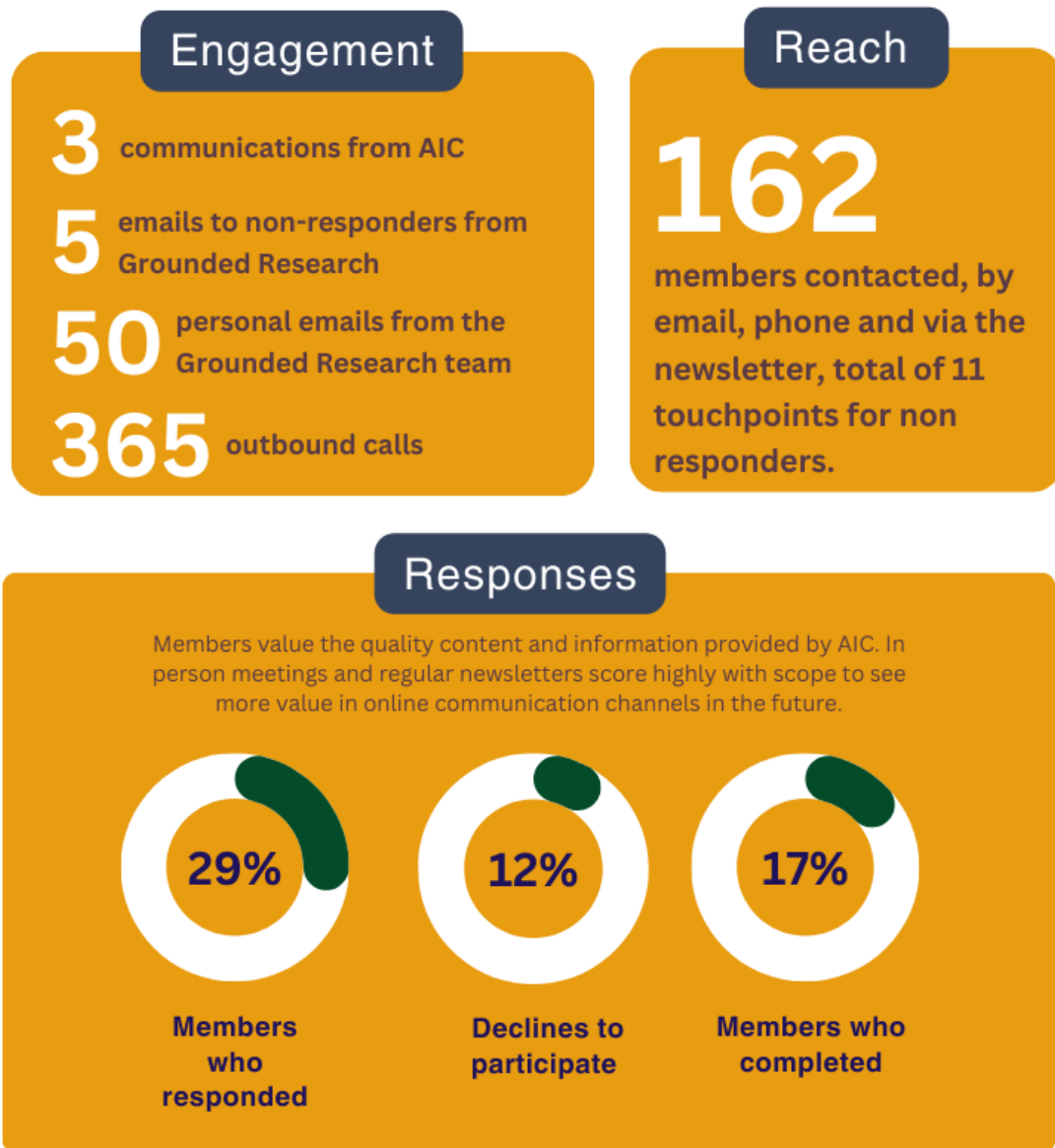
3<sup>rd</sup> Sept - Final Invitation (unscheduled but included on request from AIC due to poor response rates)

Week	1	2	3	4	5
Emails from AIC	Email to members that they will be contacted	reminder in the newsletter			Final email reminder
Emails from Grounded Research	Invitation to participate	Reminder 1 to non respondents	Reminder 2 to non participants	Reminder 3 to non participants	
Follow up to all bookings	Follow up calling				
Outbound calling to non responders	Outbound calling				

Based on the difficulties faced by the research team in reaching key contacts at some Member organisations AIC need to improve the Member database (contacts and their details) and identify who else within the member organisations needs to receive

communications. We would suggest a process is instigated by AIC for checking and recording member company contact details, if this does not already exist. We are returning the database with new contacts added or changes made (highlighted in blue).

The response rate is considerably lower than in previous years which achieved 153 online responses in 2017 and 117 in 2020.



The reasons for the decline in response rates are believed to be as follows:

- The timing of the research; this took place during August and September where previously had been September through October.
- The database provided by AIC had 37 incorrect contact details including a number of key contacts who had left the company or retired, changes to companies from mergers and acquisitions or similar. This meant that the research team spent a significant amount of the fieldwork time trying to track

down the right contact or telephone numbers (blue highlight on returned calling database).

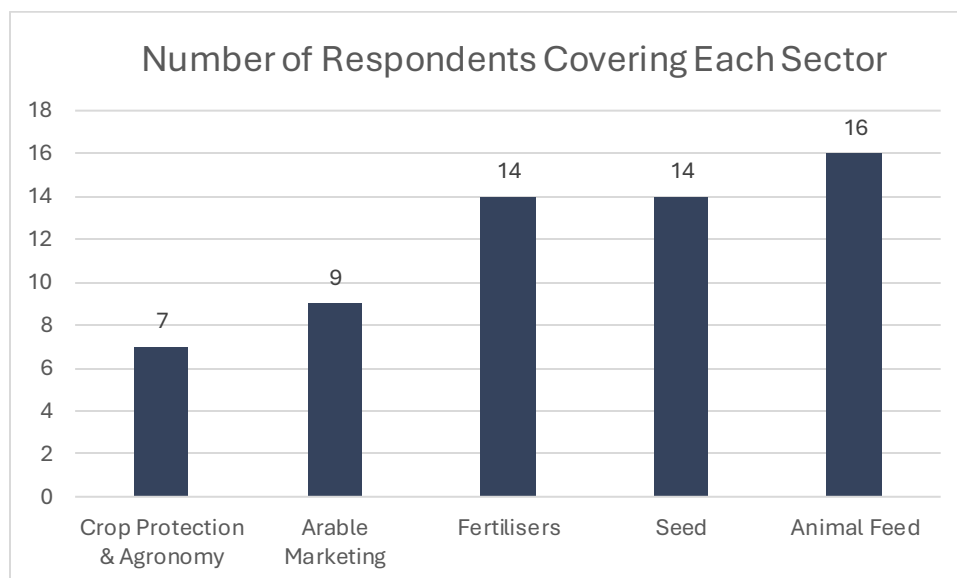
- Contact details held by AIC are often switchboard numbers. Many companies now have unmanned switchboards and as many employees work from home, they are unable to put calls through, provide mobile numbers or contact key personnel through any other means than email. This is an issue that Grounded Research have observed on many other projects and has occurred since the pandemic.
- Also, as respondents receive so many emails on a daily basis, and increasingly appear to be under pressure in the day-to-day elements of their job, we have observed that response rates have reduced significantly over the last few years.
- From the less positive comments received by some respondents who declined to take part in the survey, there is a suggestion that membership is expensive, especially for smaller companies and these organisations do not feel they get true value from their membership.

# Respondent Profile

## Sector

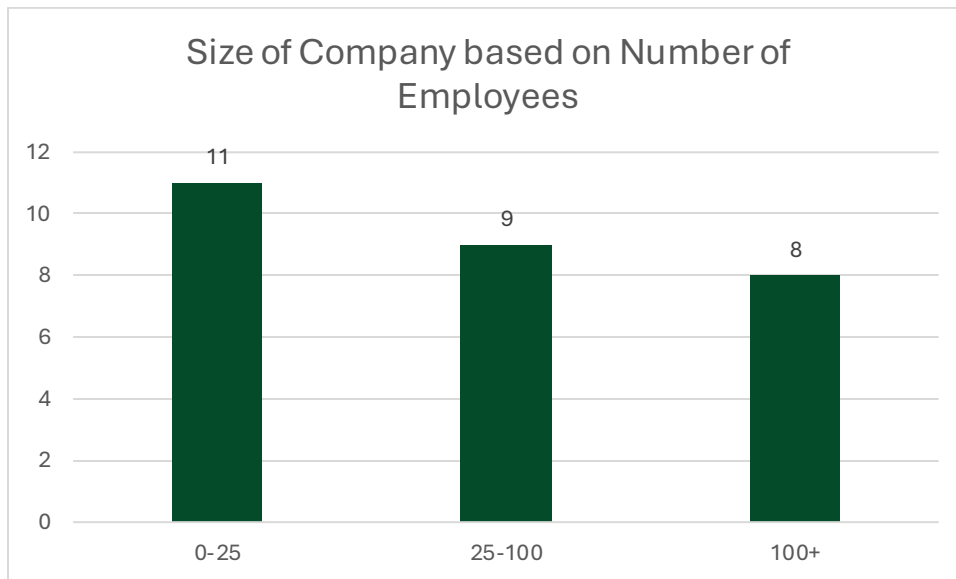
There was a good representation of companies across all five key sectors.

Sector	Number of respondents in each sector	Percentage of total Members in each sector
Crop Protection	7	21%
Arable	9	15%
Fertilisers	14	22%
Seed	14	23%
Animal Feed	16	18%



## Employees/Size of Company

Company sizes ranged from just two employees to 800. The sample represented a good cross section of company sizes based on number of employees.



## Question by Question Analysis

In this section the key questions with pertinent responses have been selected and analysed. The complete questionnaire template can be found at appendix 1.

### Question 4: Please share some unprompted thoughts about AIC, how they support your business, their wider activity, and how they represent your interests.

From the open-ended initial comments received from the Members who took part, the following key themes and sentiments emerge. In general Members recognise AIC as an essential entity for the industry, providing valuable services in representation, information sharing, and industry support, while also acknowledging areas where enhancements could be made.

The full comments in responses to this question are provided in Annex 1 but a few comments are included to illustrate the key themes emerging.

#### **Positive sentiments and themes.**

AIC is praised for representing Members' interests at government and regulatory levels, ensuring the industry's voice is heard and lobbying on critical issues like legislation, chemical usage, and trade policy.

AIC is distinct from other organisations: AIC's role is seen as crucial in advocating for views that may not always align with other organisations like the NFU or CLA, showing the importance of having a specialised body for unique sector needs.

Members value the information AIC provides on legislation, industry changes, and compliance, particularly in areas like health and safety, trade assurance, and technical knowledge. Many find the member briefings and updates on government activities beneficial.

AIC is recognised for offering specialised support in areas like fertilisers (FEMAS) and supporting new initiatives such as UKFFPA. However, some Members express concerns about being overlooked if they represent smaller or more niche sectors (e.g. the equine industry).

A number of Members appreciate the direct support from AIC, including tailored advice, technical expertise, and helping Members keep up with industry trends. There is reassurance in knowing that AIC is monitoring the business landscape and acting on their behalf.

AIC is widely regarded as an essential trade association that keeps the industry compliant and informed, with one Member stating that if AIC didn't exist, it would need to be created. Its role in educating and representing the sector on key issues is acknowledged, though with room for improvement in reaching out to all segments of the industry equally.

*"We need to have a trade association to represent our distinctive views to Government and other stakeholders. These views do not necessarily align with the NFU or CLA although sometimes alignment is appropriate".*

*"If we didn't have the AIC, we'd have to invent it".*

### **Less positive sentiments and themes.**

Some Members feel that AIC is expensive, particularly for smaller organisations, and mention a lack of representation for these smaller players. There is a perception that larger companies receive more attention, leaving smaller operators underrepresented.

There is some criticism that AIC has become more bureaucratic and less efficient, with a suggestion that the organisation has grown in size without necessarily increasing effectiveness.

Some Members express a need for better communication and more engagement, feeling they don't fully understand how to leverage their membership or gain more value from it.

*"The AIC is a mixed blessing. I see the need for the organisation, because a representative body is necessary on a political level, to ensure checks and measures are in place when Government make policy. But how effective is the AIC at fulfilling that need? Reasonably effective but it could be better and meet the needs of these companies better. I would score them 6/7 out of 10 and this is probably as good as can be expected given the demands of government and political pulls".*

*"They have become a more bureaucratic organisation of late with more staff that are perhaps less motivated to work on our behalf, and also less efficient."*

*"It's an expensive organisation to be affiliated with. Especially for small and modest organisations. What do we get for our fees? Because of the cost, small operators are not all joining and are therefore unrepresented- an entire strata of the industry are under-represented. It's a 'big boys club'".*

## Question 5: Thinking of your overall experience of AIC, on a scale of 1-10 how likely are you to recommend membership to someone else in your position?

The survey utilised the Net Promoter Score (NPS) to determine participate favourability towards the AIC.

A note on the NPS:

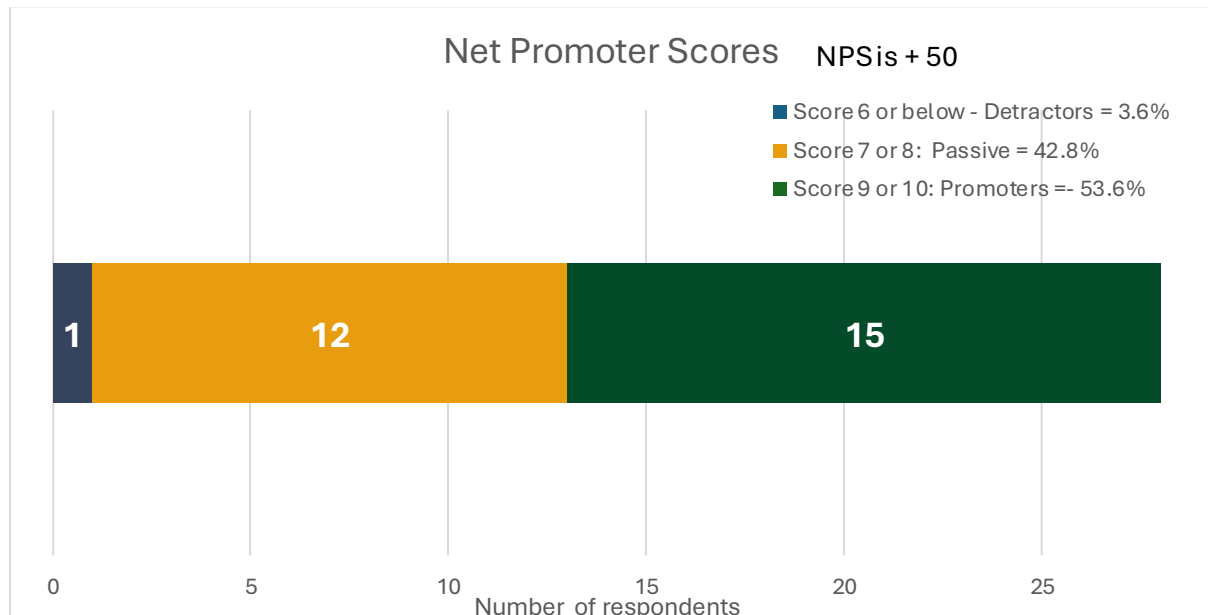
The NPS is calculated by adding the percentage of those giving a score of 9 or 10 and subtracting the percentage of those giving a score of 6 or less. Score of 7 or 8 are regarded as passive and do not count towards the score.

Any NPS score above 0 is "good". It means that your audience is more loyal than not. Anything above 20 is considered "favourable". Bain & Co, the source of the NPS system, suggests that above 50 is excellent, and above 80 is world class.

<https://www.customermonitor.com/blog/what-is-a-good-net-promoter-score>

The NPS score shows that most participants are more loyal than not, and the majority are favourable in their view towards the AIC, in terms of recommending the services.

The NPS is +50 {53.6% – 3.6%}



## Question 6: How aware are you of the following AIC work?

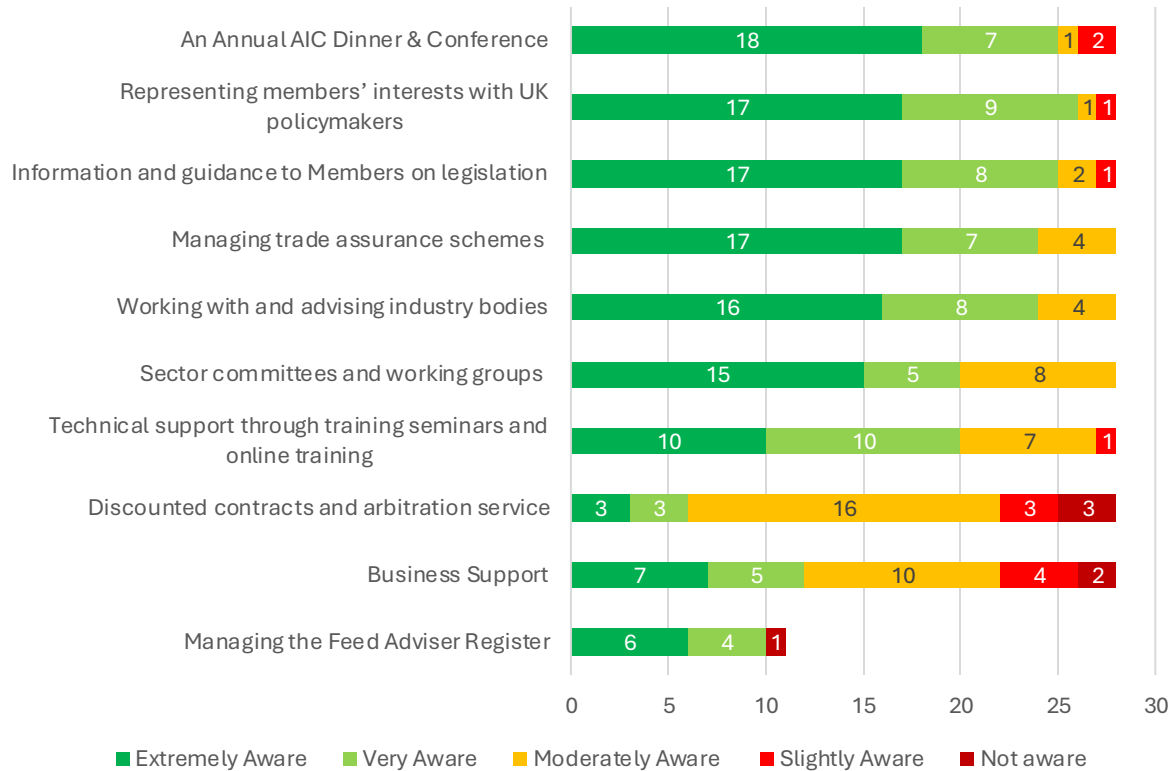
The respondents were asked to rate their level of awareness of AIC’s various work streams. In previous years they were simply asked whether they were aware or not. The question was changed for this survey to garner more detail on the level of awareness. The table below and the chart demonstrate that whilst the majority of those interviewed were aware of the services, some described themselves as only moderately or slightly aware of each service. In particular, levels of awareness of the discounted contracts and arbitration service and business support were quite low, although a number said they would not need business support services. It should be noted that nearly a third of those interviewed were not very aware of the sector committees and working groups or the technical support.

Anecdotally, those who are on sector committees and working groups, unsurprisingly have much better awareness of the AIC work

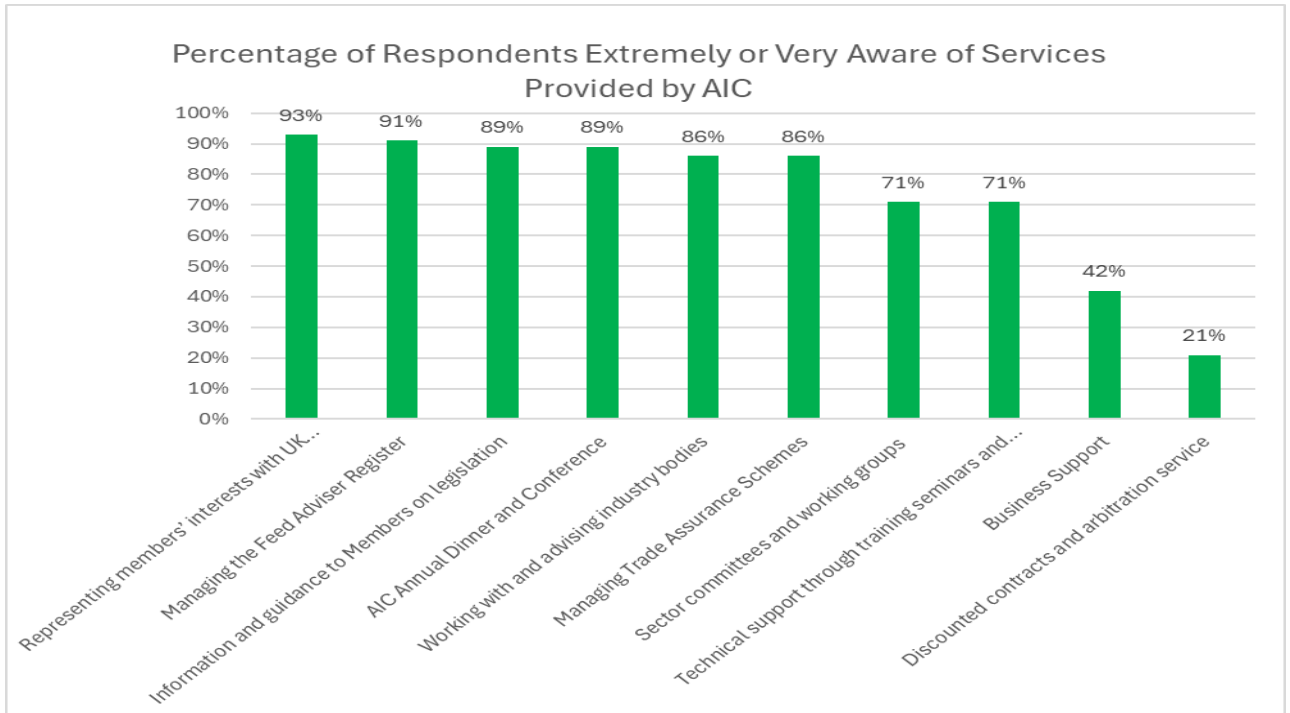
The table below shows levels of awareness by number of respondents. The table and charts show absolute numbers rather than percentages as the numbers are relatively low and percentages would exaggerate the data. The surveys conducted in 2017 and 2020 were yes or no answers so cannot be compared.

	Representing members' interests with UK policymakers	Working with and advising industry bodies	Information and guidance to Members on legislation	Sector committees and working groups	Technical support through training seminars and online training	Discounted contracts and arbitration service	Business Support	Managing trade assurance schemes	Managing the Feed Adviser Register	An Annual AIC Dinner & Conference
Extremely Aware	17	16	17	15	10	3	7	17	6	18
Very Aware	9	8	8	5	10	3	5	7	4	7
Moderately Aware	1	4	2	8	7	16	10	4		1
Slightly Aware	1		1		1	3	4			2
Not aware						3	2		1	

## Level of Awareness of Services Provided By AIC



## Chart to Show Percentage of High levels of Awareness



## Question 7/8: How important are Services Provided by AIC to Your Company?

The table, graph and charts below show the levels of importance of AIC services by number of respondents.

	Representing members' interests with UK policymakers	Working with and advising industry bodies	Information and guidance to Members on legislation	Sector committees and working groups	Managing trade assurance schemes	Technical support through training seminars and online training	Discounted contracts and arbitration service	Business Support	Managing the Feed Adviser Register	An Annual AIC Dinner & Conference
Extremely Important	18	18	16	13	13	7	4	4	3	1
Very Important	5	5	7	7	7	10	3	6	2	7
Moderately Important	1	1	1	4	4	6	4	5	1	7
Slightly Important	0	1	1	0	0	2	4	4	0	4
Not at all Important	1	0	0	1	0	0	5	4	2	4

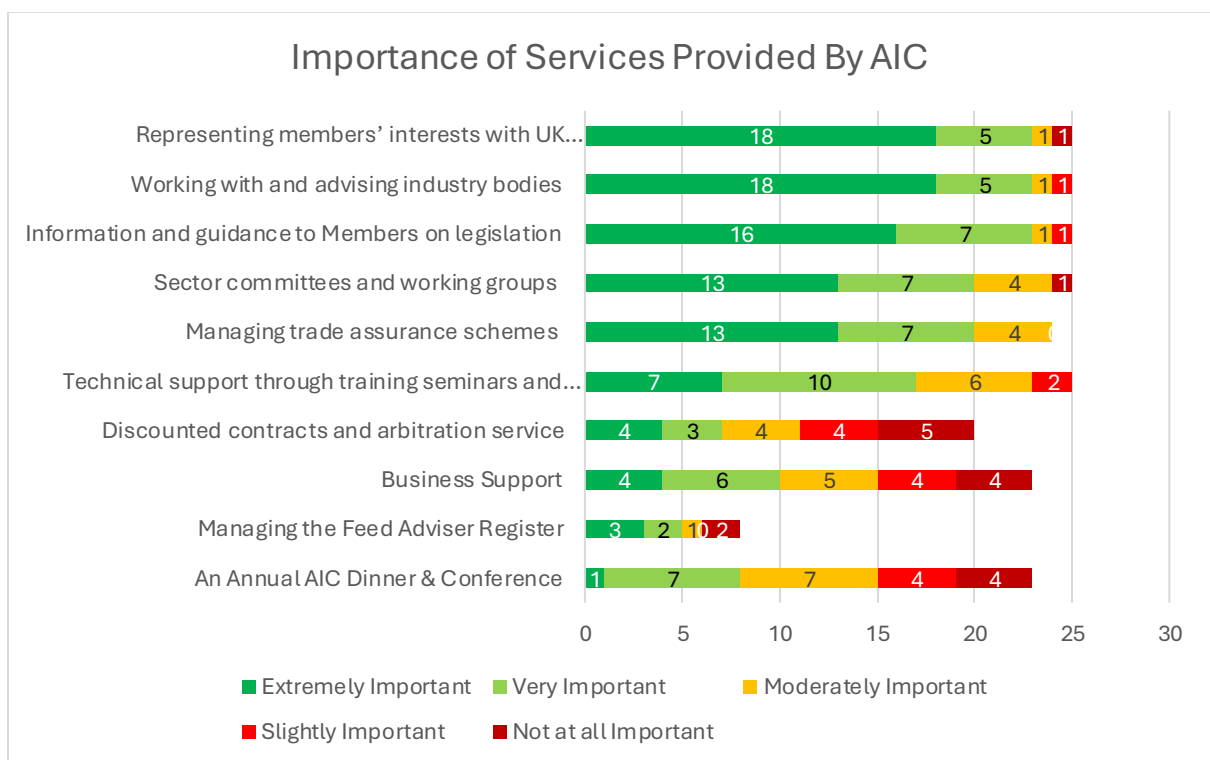
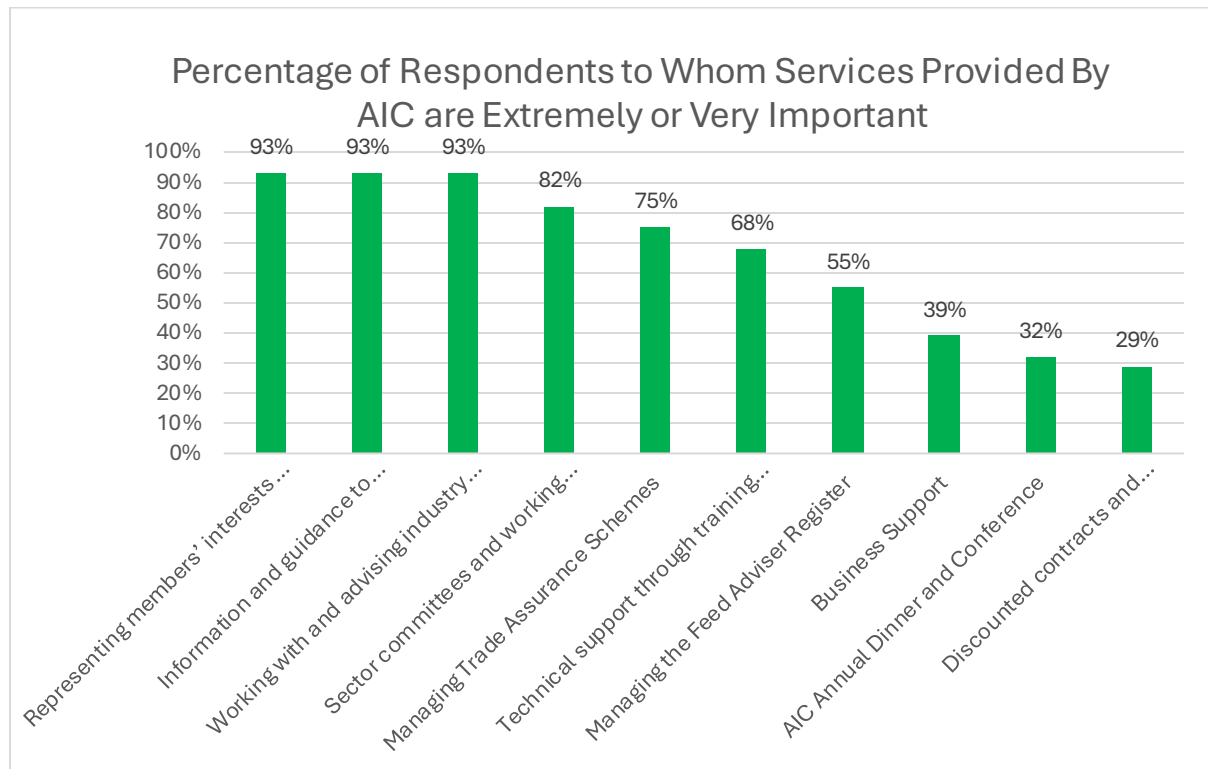


Chart to show percentage of respondents who rate services provided by AIC as important.



The data shows that for the majority of respondents (93 %) representing Members’ interests with UK policy makers, working with and advising industry bodies and the provision of information and guidance to Members on legislation were of the highest importance to AIC Members.

The AIC membership survey in 2020 showed similar data. Scoring criteria differed, however the top scoring factors were; representing Members interests (77% of great importance – the highest parameter), guidance to Members on legislation (67% of great importance) and working with sector committees and working groups (53% of great importance). Of note however is that the 2020 survey panellists scored working with and advising industry bodies as a lower importance; 67% of respondents said it was only ‘quite’ important.

## Question 9: How Effective are Services Provided By AIC?

The table shows the rating of effectiveness by number of respondents. Any blank cells mean the respondent was unable to comment on the service provided.

Rating	Representing members' interests with UK policymakers	Working with and advising industry bodies	Information and guidance to Members on legislation	Sector committees and working groups	Technical support through training seminars and online training	Discounted contracts and arbitration service	Business Support	Managing trade assurance schemes	Managing the Feed Adviser Register	An Annual AIC Dinner & Conference
Extremely effective	4	4	10	7	2	2		11	1	5
Very effective	19	17	11	8	11	3	5	12	5	10
Moderately effective	3	5	5	9	11	14	12	3	3	6
Slightly effective					1	3	2			3
Not at All effective							1			

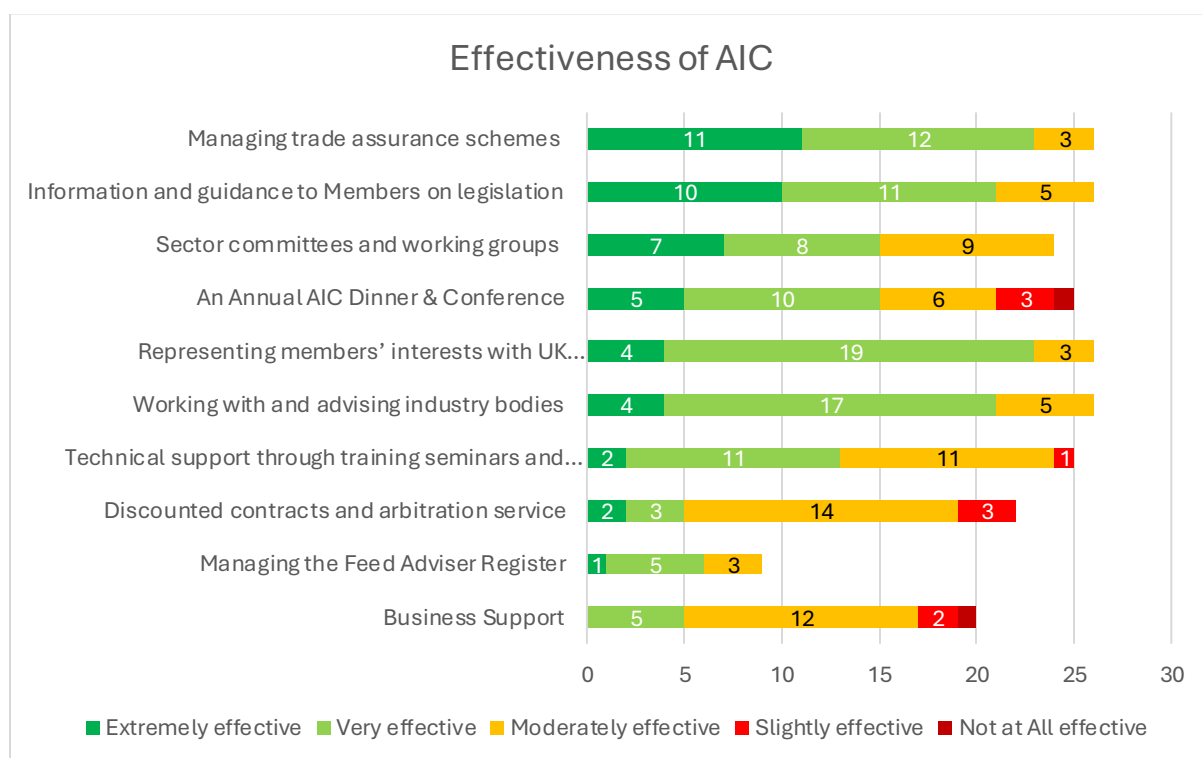
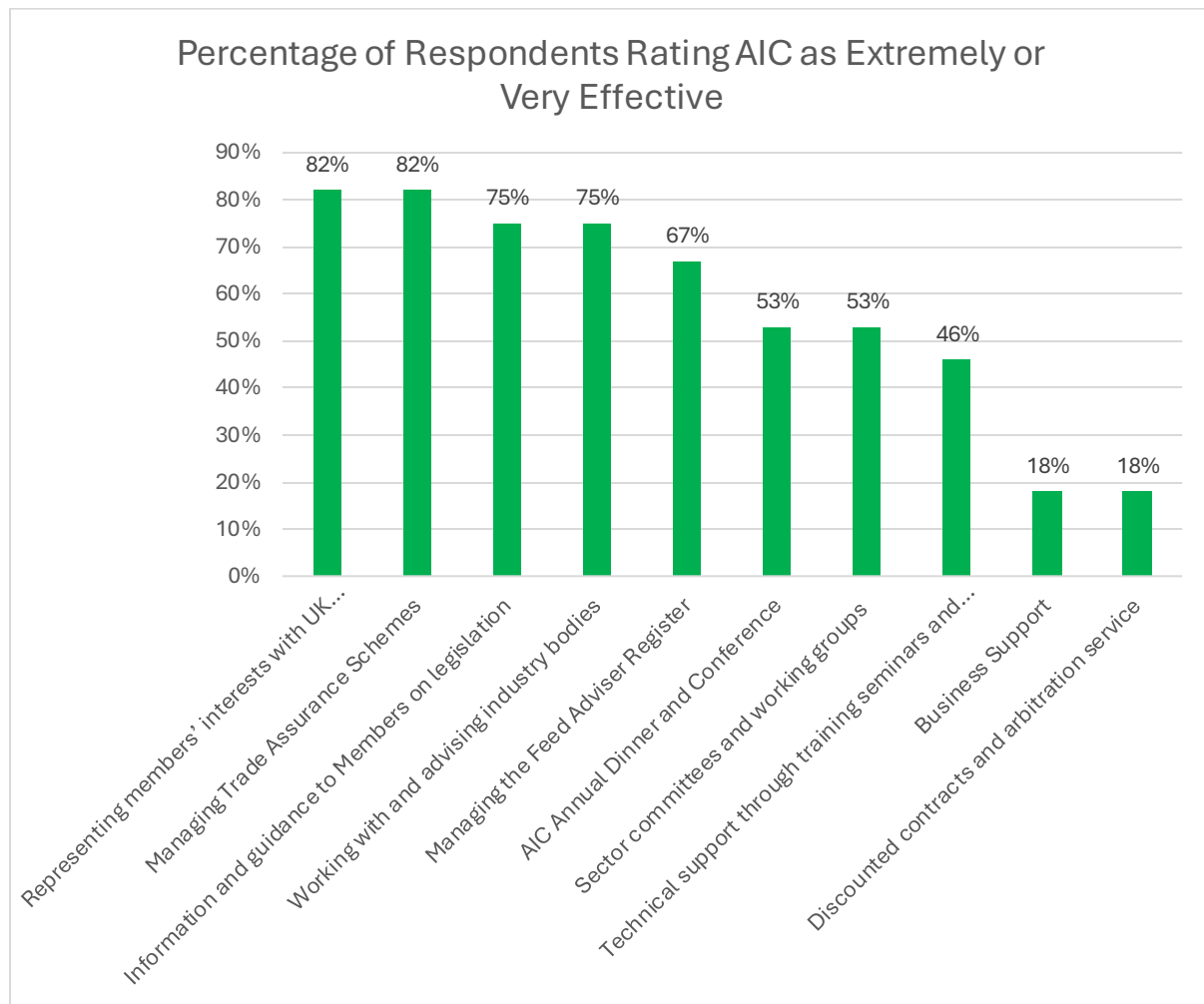


Chart to show percentage of respondents rating AIC as effective



Where respondents gave high scores, the survey sought to gather more information about why those scores were given.

All comments are contained within the raw data file which will be provided separately but in summary Members rate AIC highly for its political influence, timely updates on legislative changes, effective working groups, and its ability to support self-regulation while maintaining industry standards through trade assurance schemes. Networking opportunities and the staff’s expertise further reinforce AIC’s value to Members.

Members generally praise AIC for its strong representation in political arenas, particularly in lobbying government and attending key meetings (with the likes of NFU, AHDB). AIC’s ability to influence legislation and policies that impact agriculture and agribusiness is seen as one of its core strengths. However, some of those interviewed feel that this new government is not listening to the industry and AIC may well have to work even harder to get Members voices heard and ensure that the government fully understands the challenges faced by the industry.

Members value AIC's consistent and timely flow of information and briefings regarding legislation and regulatory changes. Email updates, face-to-face meetings, and publications are particularly appreciated for keeping businesses informed and compliant. The respondents generally feel the AIC staff are knowledgeable and value sector specific expertise.

AIC's role in managing accreditation schemes and setting high standards for feed and fertiliser safety is highly rated. Members see these schemes as critical for maintaining industry credibility and regulatory compliance without excessive external legislation.

AIC's working groups and committees are seen as crucial platforms for sharing information and facilitating collaboration among Members. These groups also allow Members to contribute to AIC's work, which in turn makes them more aware of the behind-the-scenes efforts. Although those who take an active role seem to have scored AIC more highly in this regard.

Some typical comments are below

*“Performance has been very good in these areas. (the four highest rating shown on chart) I would like to see these areas around lobbying, legislation and representing member's interests continue to be the priority and therefore the most effective areas”.*

*“Despite my comments on DGP (Digital Grain Passport), I hold AIC in high regard in all other respects. The organisation is staffed by knowledgeable and competent staff who allow AIC to punch above its weight”.*

*“We believe that AIC will support our business in any area that we ask for support which is a great support to us”.*

*“I observe the AIC being very proactive and effective in these areas - it is a particular strength (stakeholder briefings, work through committees and member guidance). The conference is also a great networking opportunity”.*

*“I am part of 2 of these AIC committees so see first-hand the work that is done”.*

*“They are pretty good at representing the industry, but I think they have a hard job. One of the key things are all the trade deals the Government is doing with other countries - they are not supporting British farming by doing this - it is opening the way for cheaper imports of less quality e.g. NZ lamb and Australian beef. UK Agriculture is being treated like a minor player and AIC need to have more power”.*

*“I know they are very active and, on the ball, and on the whole, they do a good job”.*

*“I have an artificially skewed view as I am part of the AIC board, but I am aware that the services (trade assurance schemes) are run very well and financially and commercially successful”.*

*“The fact that they are sector specific - AIC is well connected with policy makers and influencers, they are good at networking and representing members political interests”.*

Where respondents have given lower scores Members expressed the need for clearer communication, more inclusive representation, and a more proactive approach from AIC to ensure they feel fully supported and informed.

In particular, the sector committees and working groups seem to be dominated by the larger companies (perhaps because they can spare the staff time to attend meetings?) and the smaller companies feel excluded.

Sometimes communication is not as clear as it could be and those who are not active members of AIC feel that they miss out. A couple of the respondents said they find the website difficult to navigate.

Although Members acknowledged AIC’s efforts, many felt lobbying could be more impactful. Some mentioned that AIC struggled to influence key political stakeholders, especially in comparison to other lobbying groups, such as NFU or NFUS. Others felt that progress was slow, particularly in dealing with the government.

With some of the services, lower scores have been as a result of a lack of awareness of what is on offer, particularly in the case of business support (HR and H&S), arbitration services and technical support by way of training and webinars.

The dinner is regarded as expensive and difficult to attend for those not based in the East of England.

The lower scores are illustrated by the following sample of comments:

*“A bit more communication of what they are doing particularly with the deforestation would be useful. I would like to understand more about what they are doing moving forward”.*

*“Sometimes the AIC hides behind distributional issues. Not often but there have been cases where this has led to unnecessary gold plating of regulations over and above what the Government initially contemplated.”.*

*“Lobbying of government is not as effective as it could be and in comparison to other lobby groups. Progress is being made but a long way to go”.*

*“It's hard to deal with the current government because they don't want to listen, especially the Welsh devolved government. The AIC try but no one is listening”.*

*“I am very disappointed in how AIC have handled the digital passport situation. In my view, this process was not handled in the way I would expect from a membership organisation, as it lacked transparency and democracy of decision making”.*

*“The arbitration service does not work or lead to just outcomes”.*

*‘They are and I am quite happy. They struggle to be effective given the current political situation but I think they try their best.’*

*“I feel that the committees and working groups are dominated by the big national players”.*

*“I think it is disappointing that the dinner does not provide more opportunity to network. If you do not take a table, it is quite exclusive”.*

*“The AIC dinner is very expensive for what is it”.*

*“I feel that the AIC dinner should move round the country, not always be in East Anglia - it's a 4 hour trip for them from the south coast”.*

*“Communication on how it all works would be helpful and to know whether this is standardised throughout the industry”.*

*“Some of the challenges relate to measuring exactly what AIC delivers. A lot of their work involves lobbying and trying to represent our side of the industry's case to the relevant authorities. However, it's difficult to measure the level of success that comes from these efforts. There's considerable time spent in discussions and deliberations, but the long-term impact on the businesses we're involved in remains somewhat unclear to me”.*

*“Another area of concern for me is the AIC website. I find it awful. Often, you click on something for more information and are met with a face and a signature but no actual detail. In terms of delivering information internally, given that the website is a major tool, it's not very useful”.*

## Question 12: Please explain briefly what difference AIC has made to your overall business performance, or what has been the added value from your AIC membership?

The value AIC provides varies from company to company. Its most recognised value lies in industry representation, early access to critical information, and support through assurance schemes to maintain industry standards. However, some Members feel the tangible impact on their business is hard to quantify in terms of value.

Many Members appreciate AIC's efforts in lobbying on behalf of the industry, ensuring a collective voice in key government discussions. This is especially valuable for smaller businesses that don't have in-house lobbying capabilities. However, some feel AIC could be stronger in its lobbying efforts.

AIC provides early access to key industry information, helping businesses stay informed about issues, regulatory changes, and trends. This has helped Members adapt strategies, maintain compliance, and continue operations (e.g., during COVID-19). Members also value AIC's market data, assurance schemes, and insights across various sectors.

AIC helps businesses monitor industry developments and respond proactively to changes, which might otherwise go unnoticed. Some Members appreciate AIC's ability to bring together multiple sectors within the agri-supply trade, fostering a more holistic approach to industry issues. In addition, AIC facilitates networking through events like the annual dinner and sector-specific meetings, enabling Members to connect with peers and stakeholders outside a commercial context. These interactions are seen as beneficial for building industry relationships.

Membership in AIC's assurance schemes (e.g., feed safety, trade assurance) is crucial for maintaining credibility and meeting industry standards. These schemes enable businesses to trade more freely and without barriers.

Some illustrative comments are included below:

*"I get early info on issues, key stakeholder meetings ensuring our industry has a voice, giving the opportunity to network".*

*"They provide template government consultation responses".*

*"It is a good place to get up to date information on the different sectors, which helps with our audit and health & safety".*

*“AIC has given the business insights/info/data that has allowed the business to adapt its strategy to the changing market. It is difficult to quantify the impact on the overall performance of this”.*

*“For a diverse business with relatively low staff numbers, AIC's role in monitoring all that goes on in the industry and feeding that back to us in concise clear messages is vital”.*

*“Without AIC, most of these issues would go unnoticed, or would become apparent only when it was too late to act”.*

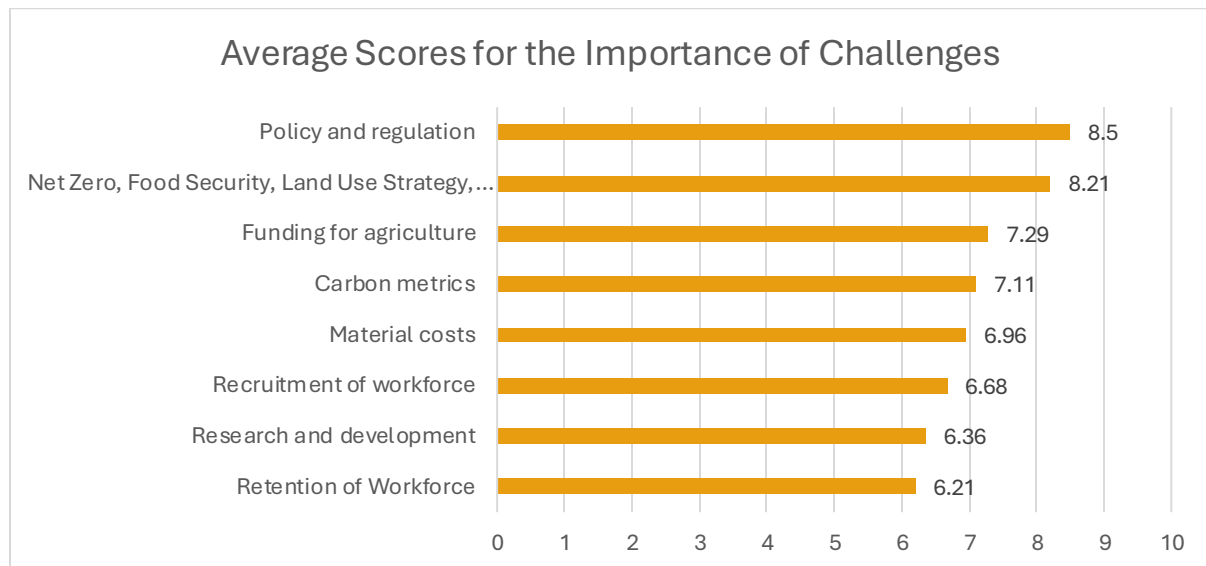
*“Added value mostly comes from representing industry issues to Government and other stakeholders”.*

*“The added value is the fact that they interface with government, and it gives us access to them, but they need to be a bit stronger and consider us as much as the national companies”.*

*“On a technical level, AIC provides opportunities for interaction within the industry. There used to be more distribution and manufacturing companies, and AIC facilitates meetings where we can interact outside of a commercial environment. This can be quite useful”.*

*“AIC brings together multiple sectors, that's where the real value is to me -AI helps businesses monitor industry developments and respond proactively to changes, which might otherwise go unnoticed. Some members appreciate AIC's ability to bring together multiple sectors within the agri-supply trade, fostering a more holistic approach to industry issues”.*

**Q13: Please rate the challenges identified as facing the industry based on the impact you believe they will have on your business in the next 1-3 years.**



Many other challenges were mentioned which can be summarised as

Environmental and regulatory pressures:

- Countering environmental NGOs and activist agendas
- Dealing with changing regulations (water, waste, Environmental Agency)
- Carbon accounting and reporting standards
- Sustainable Farm Incentive (SFI) implementation and changing goalposts
- Nitrate Vulnerable Zones (NVZ) regulations, especially in Wales

Market and economic challenges:

- Fluctuating raw material prices
- Cashflow issues and supplier lead times affecting production
- Market instability, particularly in the lower-end equine industry
- Lack of certainty and confidence in farming
- Global competitiveness concerns

Agricultural support and innovation:

- Lack of government support and funding for agricultural innovation
- Concerns about falling behind Europe and the rest of the world
- Perceived undervaluation of domestic food production by the government

Brexit-related issues:

- Difficulties in trading with Europe
- Phytosanitary regulations complicating seed movement

Increased red tape and customs procedures, ~~an~~ crop management and protection:

- Decline of active ingredients for crop protection
- Challenges in maximizing outputs due to environmental lobbying
- Reduced toolkit for combating weeds and pests
- Oilseed rape (OSR) crop area viability concerns

Sustainability and retailer pressures:

- Raw material sustainability
- Pressure from retailers on sustainable practices

Specific industry challenges:

- Feed hygiene and effective control measures
- Uncertainty surrounding the EU Deforestation Regulation (EUDR)
- Maintaining the Global Feed LCA Institute (GFLI) database for carbon foot printing

Climate and weather-related issues:

- Adapting to climate change
- Dealing with unpredictable weather patterns

These challenges highlight the complex landscape that companies in the agricultural and related sectors are navigating, balancing environmental concerns, regulatory changes, market pressures, and the need for innovation and sustainability.

The additional challenges noted are provided in full below.

*“Countering environmental NGOs”.*

*“Countering Natural England and their activist agenda”.*

*“Carbon Accounting and Standards”.*

*“Prices of raw materials fluctuating”.*

*“Cashflow and supplier lead times making production more difficult. We deal with the Equine market as well as Agriculture and the bottom end of the Equine industry is struggling a little, the top end racing and competition horses is fine”.*

*“Changes to other regulations that are not sector specific, Water/ EA /waste”.*

*“The markets”.*

*“Support and funding for Agriculture in general - especially innovation. We will get left (further) behind Europe and the ROW. Govt valuing own food production is still not in evidence”.*

*“Raw material sustainability. Pressures from retailers”.*

*“Sustainable Farm Incentive (SFI)”.*

*“Only the issues of Brexit and trading with Europe being hard at the moment”.*

*“The fact that there is not much certainty and confidence in farming. Many farmers have gone down the SFI route and the goal posts keep moving so it makes it very hard for us to predict how much crop land will be reduced which is causing instability for our business”.*

*“Carbon reporting. The Glfi database of feed ingredients and the carbon footprint is extremely important for us as we cannot do anything without it”.*

*“No they are all under those various headings”.*

*“NVZ specific to Wales - as they have a lower nitrogen limit”.*

*“Welsh government have been lobbied on this but they are not listening - their focus is all on the environment”.*

*“I think that the major issues are covered”.*

*“The steady decline of active ingredients to help arable farmers to maximise outputs. As this continues they become less capable of supporting domestic demand”.*

*“I think what happens is through all sorts of different influences, environmental lobby groups is a good one. We've seen what's happened with Neo Nix. We've seen what's happened or what potentially could happen with glyphosate”.*

*“Where we're quite powerful, environmental lobbying groups can influence decisions which reduce the effectiveness of the arable farmer, because they can find it harder and harder to combat. Whether it's weed, infestation or pest infestation, or whatever else it comes their way”.*

*“From an optimum growing environment and we're still trying to compete on a global, a global footprint. So as we reduce active ingredients that help support agriculture, arable agriculture, it becomes ever so ever more difficult to, to compete or be competitive. Everyone talks about productivity and improving productivity and soil health and all that kind of good things, which I think everyone is striving to achieve in their own kind of way”.*

*“Reducing the toolbox or the toolkit in order to do that is a challenge for the future”.*

*“Phytosanitary issues - makes the movement of seed difficult”.*

*“OSR crop area is a significant issue to our business and the viability of this area of the breeding programme”.*

*“There's a lot more red tape regulation about moving seed in and out of the UK, you know, before Brexit, we're literally just brought it in. If we ordered it, if I ordered it today, it would be here on Monday. Now if I order it today, it might be here 2 weeks on Monday. And a big you know that the big part of that is phytosanitary”.*

*“Regulation and you know the customs element is pretty limited to us, it's the, it's the testing and certification, the extra burden. Now what I see we're already working on it. It's you know there's it's an ongoing topic and you know trying to get some sort of dispensation veterinary agreement with the EU which it will. It would involve SBS and phytosanitary within it.”.*

*“Near term challenge for all of us is the uncertainty of EUDR. Also challenges faced with feed hygiene with regard to inability to use effective control measures”.*

*“Weather, climate change, global wheat prices but these are global issues over which AIC cannot have control”.*

## Question 15: What can AIC do to support you in overcoming some of the greatest challenges?

In general, companies value AIC's lobbying efforts, access to information, and industry connections. They would like AIC to continue and expand these efforts, particularly in addressing unfair policies, carbon measurement tools, and practical solutions to regulatory challenges.

### Lobbying and Policy Advocacy:

- Continue lobbying the government for practical, non-political solutions to industry challenges.
- Advocate for fair and balanced regulations, especially regarding carbon calculations, import/export policies, and divergence from EU regulations.
- Push for policies that support UK agriculture and food security.
- Engage with policymakers to ensure they understand the unintended consequences of their actions on the agricultural sector.

*“To lobby government on a practical - NOT political solution to the above problems”.*

*“I think they face an impossible task because the government set unachievable targets when leaving Europe”.*

*“The government are not paying enough attention to UK agriculture and causing instability with funding, SFI etc”.*

*“It all comes down to the lobbying and policy. The recent shift towards the SFI subsidiary scheme has had an impact on some of the species we are active in, particularly peas and break crops”.*

*“It is possible that AIC could lobby government in health and safety regulation which could drive up cost. It is felt that the AIC can have limited impact on material costs”.*

*“It all comes down to the lobbying and policy. The recent shift towards the SFI subsidiary scheme has had an impact on some of the species we are active in, particularly peas and break crops”.*

*“It is possible that AIC could lobby government in health and safety regulation which could drive up cost. It is felt that the AIC can have limited impact on material costs”.*

## Sustainability and Carbon Footprint:

- Develop standardised tools for measuring carbon footprints across the agricultural sector.
- Continue championing the Global carbon footprint database.
- Provide guidance on achieving net-zero goals.
- Address concerns about carbon taxation and ammonia emissions, focusing on major contributors like slurry lagoons.

*“We need to address the issue where an airline can be net zero, and in the same breath we are killing the environment, the calculation needs an overhaul allowing fairness”.*

*“Food security - again it seems ok the UK to import food to reduce carbon, however I think the processes and procedures will have more of a negative impact on our environment”.*

*“Continued help on Scope 3, along with allied trade bodies”.*

*“AIC have already supported members as they are members of GLFI. Championed Global carbon footprint database that will hopefully become industry standard. Also have head of sustainability that drives a sustainable road map”.*

*“It would be good if they could provide us with the tools to be able to measure the carbon footprint across the business as a standardised fashion that is the same across the agricultural sector”.*

## Information Sharing and Updates:

- Keep Members informed about regulatory changes and industry developments.
- Share innovations and best practices across the sector.
- Provide regular updates on Scope 3 emissions and related topics.

*“Keep us up to date with changes”.*

*“Provide information and how we can adapt”.*

*“Spreading news of innovations and best practice”.*

## Workforce and Labor Issues:

- Address concerns about workforce expectations (flexible working, shorter hours) and their impact on agriculture.
- Engage with the government on workforce policies that consider the unique needs of the agricultural sector.

*“I am concerned that the modern workforce expects flexible working, shorter working hours, and no reduction in remuneration. Whilst this might work in certain scenarios, it won't work in agriculture, haulage, ag-retail, etc (not in the NHS, education, etc). But how do we persuade people to work in agriculture with its seasonal work peaks and 'always open' business hours when workers have softer options elsewhere?”*

*“In my view, we need to persuade government that they can't run the NHS or schools on a flexible or 4-day week basis and therefore they should stop pushing the model for other sectors (particularly the Civil Service) before they create a two-tier workforce in the UK”.*

#### Trade and Market Access:

- Work towards fairness in import/export regulations.
- Address challenges related to the UK's divergence from EU regulations and its impact on competitiveness.

*“International trade - easy to import into the UK, hard to export, again we need fairness, our politicians rolled over and allowed this to happen, criminal”.*

*“Because you know the biggest challenge with all of the divergent from EU regulation is that the person that loses out is the UK farmer. And when we're trying to ensure that productivity gain and all the rest of it in the UK is as strong as it can be, then actually having a sort of a sort of, you know, a bungee cord”.*

#### Regulatory Simplification:

- Advocate for policies and regulations that are risk-related and defined in simple terms.
- Resist unnecessary annual additions to policies.

*“Try and ensure policy and regulation relates to risk and is defined in simple terms. resist the desire to add to policy on an annual basis”.*

#### Crisis Management:

- Continue providing support during crises (e.g., COVID-19, supply chain disruptions) as has been done in the past.

*“They can't really influence climate change and food prices but what they have done with Covid, Red Sea and Suez, etc. have been helpful so doing everything they can”.*

## Question 16: Sustainability Practices

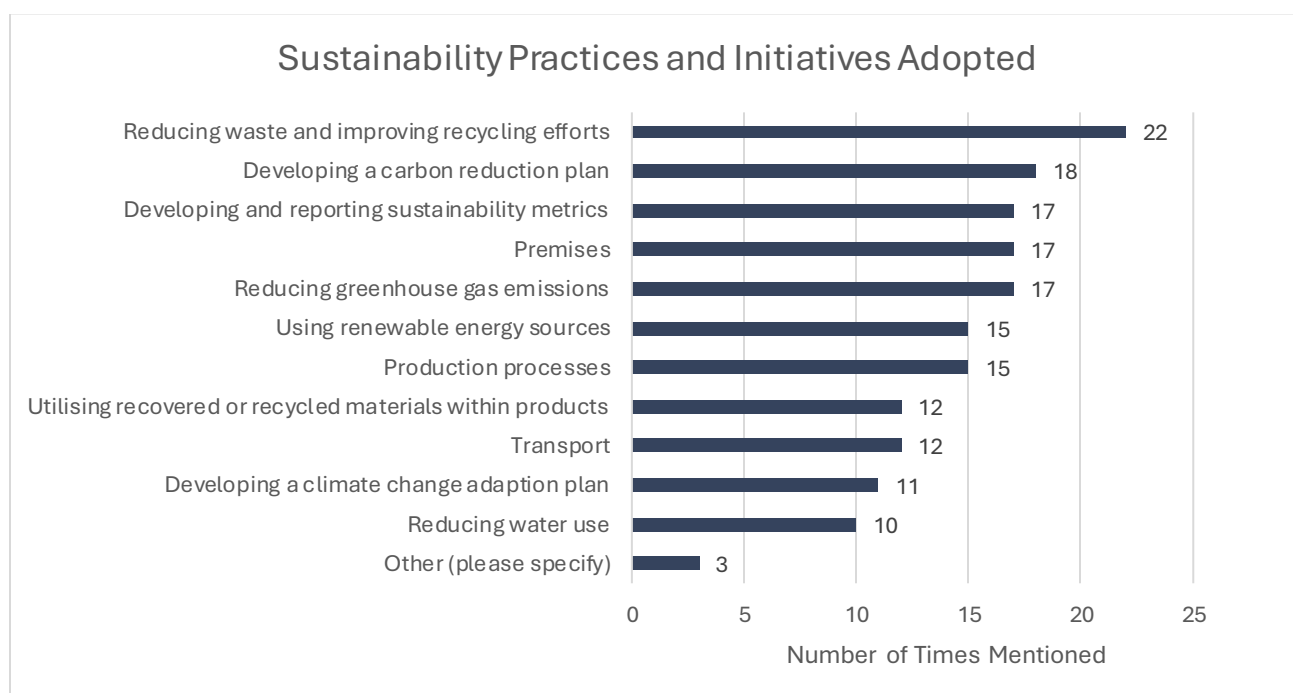
The respondents were asked what sustainability practices and initiatives they have adopted in the last year.

Three quarters are focusing on reducing waste and improving recycling efforts.

Nearly two thirds have started to develop a carbon reduction plan and are looking how to report on their sustainability metrics as well as taking steps to reduce the carbon footprint of their premises.

Just over half are using renewable energy and renewing their production processes.

Only just over a third of those interviewed are reducing water usage and developing a climate change action plan.



Other comments made were:

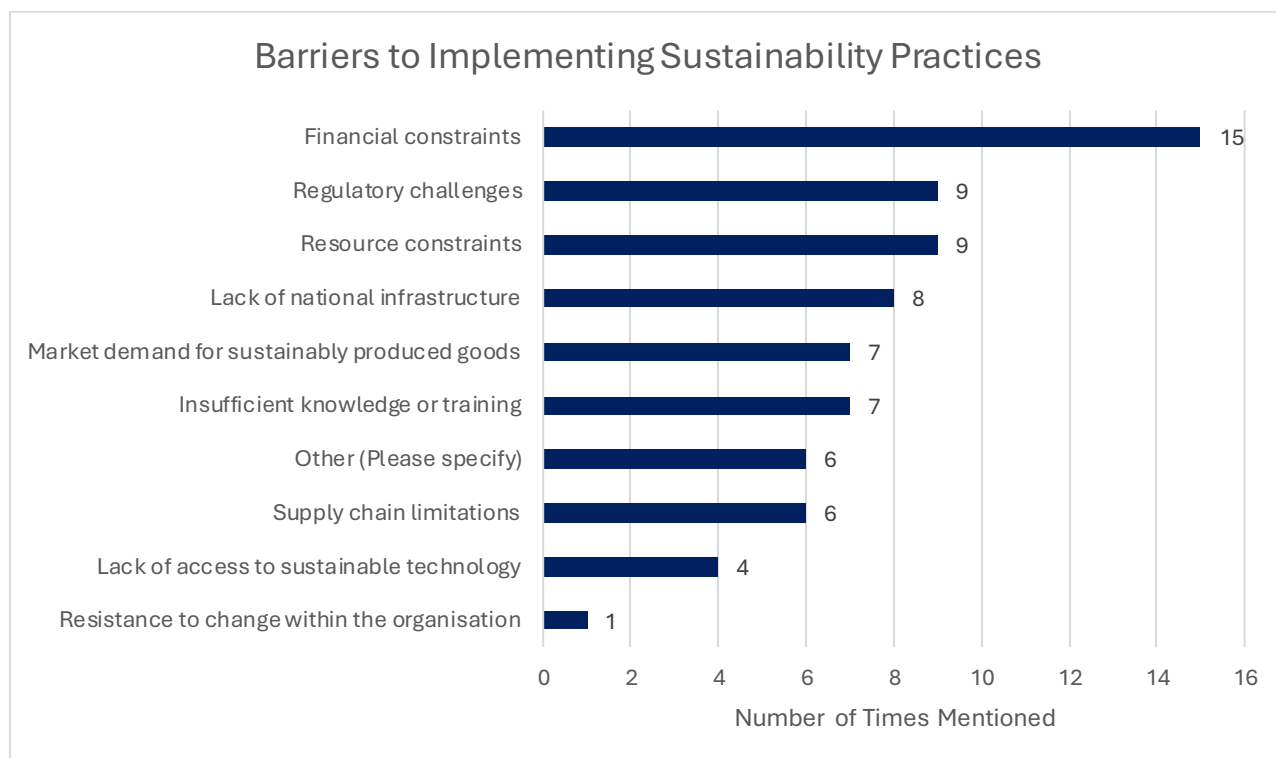
*“ESG Plan”*

*“Reducing waste and improving recycling efforts, Utilising recovered or recycled materials within products”.*

*“We are currently scoping a number of initiatives mentioned above but they have not yet been implemented”.*

## Question 17: Key barriers to implementing sustainability practices

Respondents were asked to identify the key barriers to implementing sustainability practices. Costs was the biggest barrier with the other listed constraints affecting a third or less of those interviewed.



However, some of the respondents identified additional barriers which included:

*“Seasonality of energy requirement”.*

*“The trade deals being done outside the UK which are causing instability and uncertainty in farming.”*

*“We are an office of 5 people and subcontract our services out. The big contributors are not in our hands, we are not running a seed plant here.”*

*“Not on people's minds in their industry”.*

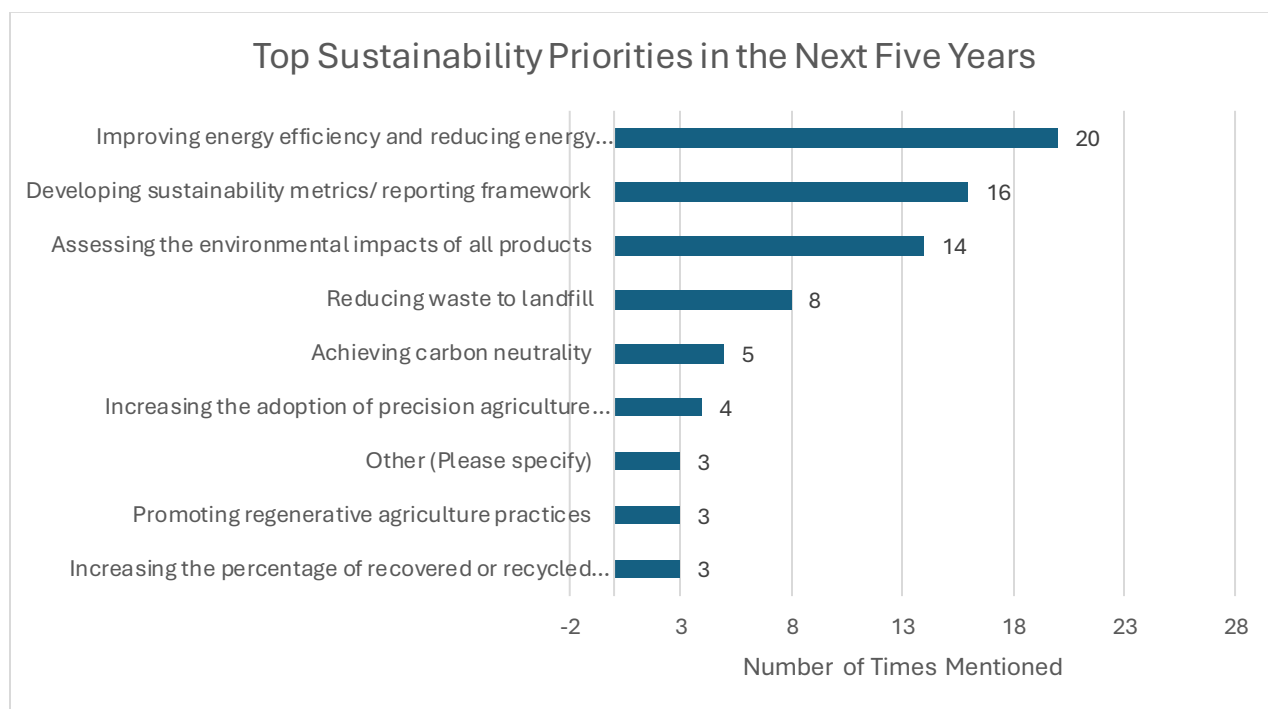
*“Understanding the direction of travel with regards to carbon and sustainability and what we need to achieve”.*

And one respondent commented;

*“How impactful these practices actually are. What is the actual point of some of these? How much worth do they have?”.*

## Question 18: Top sustainability priorities for next 5 years

When asked about the key sustainability priorities for the next five years, improving energy efficiency and reducing energy consumption, assessing the environmental impacts of all products and developing sustainability metrics/ reporting framework were the priority for at least half the respondents.



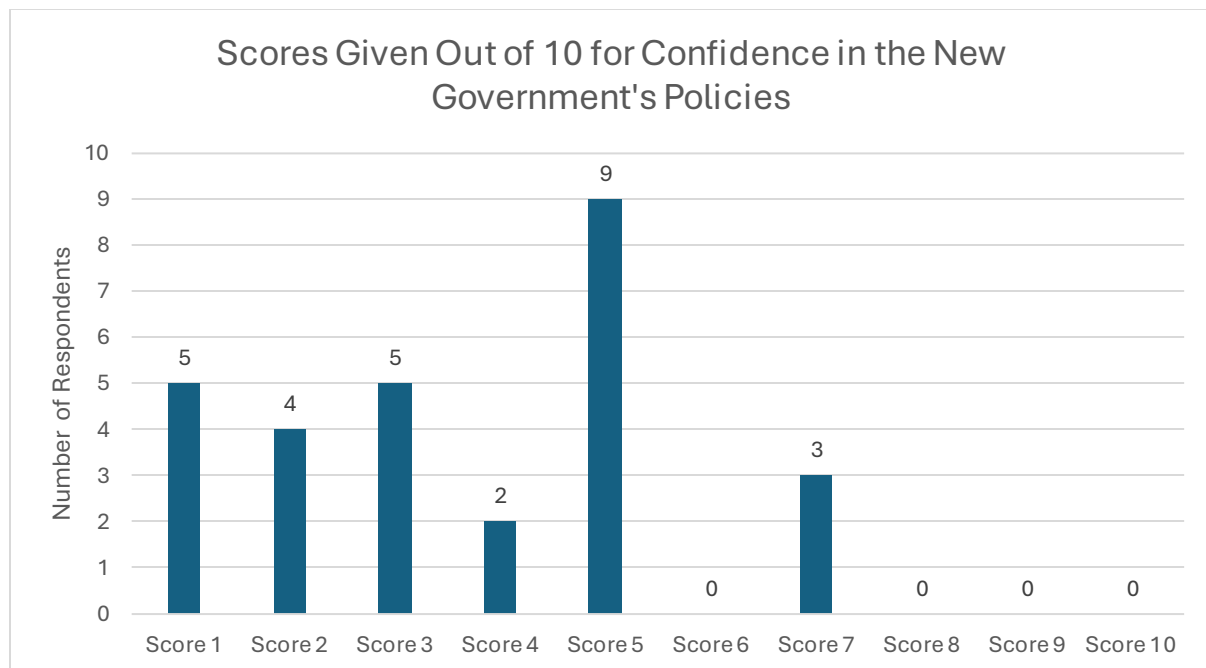
Other comments made were;

*“Avoiding box-ticking and bureaucracy with no practical gain”.*

*“Staying in business despite the new agricultural policies”.*

*“We have a very small office”.*

## Question 19: How confident do you feel in the new UK government's policies aligning to the needs of your business?



Average 3.64/10

The responses to the question about confidence in the new UK government reflect a mix of scepticism and concern. Most responses indicate frustration with current policies and a lack of confidence in the government's ability to effectively support agriculture.

Many respondents feel the government lacks real-world understanding of agriculture and rural issues. There's a perception that politicians are disconnected from the realities of farming. Many express uncertainty about the new government's agricultural strategy, citing a lack of clear direction or joined-up thinking.

Historical scepticism: Some express a general lack of trust in government promises based on past experiences with various administrations.

Calls for long-term planning: There's a desire for cross-party, long-term agricultural policies that allow for better planning and stability in the sector.

Food security vs. environmental balance: Many argue for a balanced approach that allows for both productive agriculture and environmental stewardship, rather than seeing them as mutually exclusive. At the moment there is concern that environmental policies are prioritised over food production and security. Some feel this is unbalanced and potentially harmful to agriculture. Specifically, the SFI program is criticised by some

as problematic, potentially damaging to productive agriculture, and possibly mismanaged.

The lingering effects of Brexit and new trade deals are seen as problematic for both farmers, especially those growing niche crops.

There are devolution considerations: For Scottish and Welsh respondents, UK government policies are less relevant due to agricultural devolution.

Economic pressures: Concerns about potential increases in taxation, changes to employee rights, and minimum wage increases will impact all companies, especially small and medium-sized enterprises (SMEs) in the agricultural sector.

Communication and perception issues: Some mention the need for better communication about farming practices and concerns about polarising language in agricultural debates.

While the overall sentiment seems cautious to negative, with many believing that agriculture is treated as a minor player, there was one more positive note mentioning that a recent meeting with Daniel Zeichner (the new minister responsible for agriculture) provided some reassurance about stability and consistency in agricultural policy.

The comments from the respondents are captured in Annex 2, some quite extensive, reflecting the frustrations across the industry but below are just a sample of representative comments.

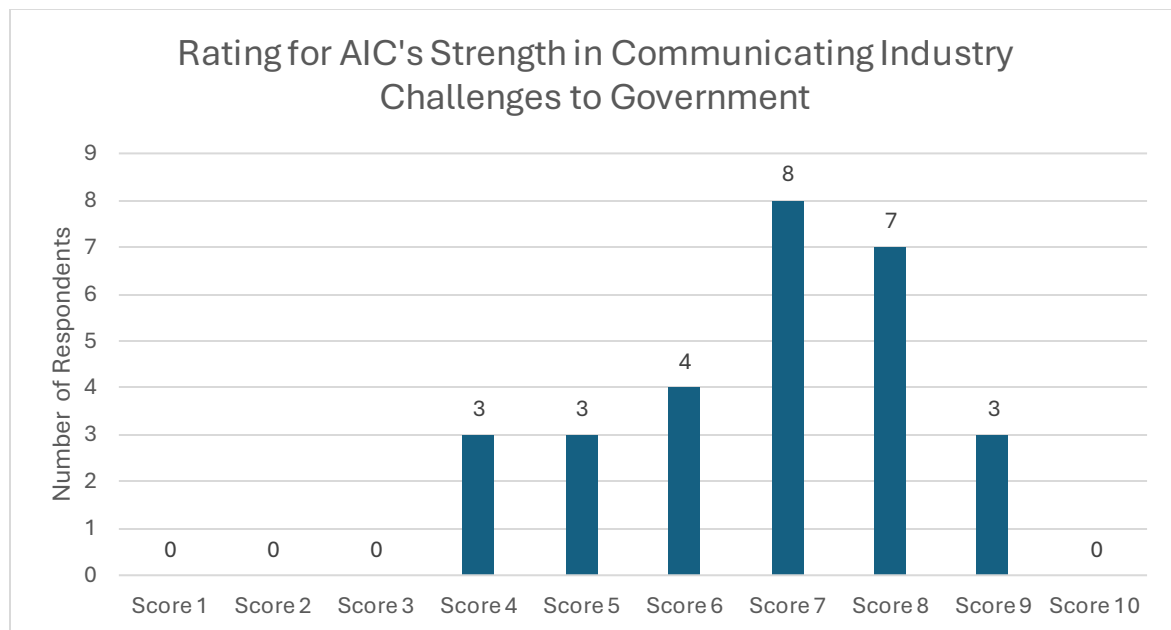
*“I don't believe they will help Agriculture or small businesses”.*

*“They do not support food production over 'the environment”.*

*“There would appear no focus on food production where as it is acceptable to abandon fields filled with ragwort which is a prohibited weed”.*

*“No evidence as yet that they have a joined-up Agriculture strategy”.*

## Question 20: How would you rate AIC’s strength in communicating the challenges your business faces at government level?



The average respondent score was 6.79/10, an above average score for the strength with which AIC communicates the challenges faced by its business members. The table above also shows that 54% of respondents scored either 7 or 8, showing that over half of respondents viewed AIC communication with Government as strong and well above average.

Although questions differ in wording, the data from respondents in this question reflects the generally favourable findings from the 2020 survey with regards Government findings. The 2020 survey found that 16% of respondents felt AIC should lobby at a higher Government level on their behalf. It did however find that respondents generally felt that AIC should take every opportunity to educate and cajole government through lobbying. The lower scores in the above table, coupled with the general feedback from respondents reflects the scope for continued pressure to be placed on government to push Member’s issues and concerns to the fore.

## Question 22: AIC lobbying of government on your behalf.

AIC is recognised for its active engagement and lobbying efforts, there is a mix of opinions on the effectiveness of these activities, with some calling for more public engagement and others suggesting a need for more targeted or aggressive approaches in certain areas.

Many respondents noted that AIC has been actively involved in lobbying the government, especially in the run-up to the election and they were seen as working hard to involve legislators in understanding farm operations.

*“Good - active lobbying - especially in the run up to the election”.*

*“Good communication with the Government”.*

*“I did see that there was a lot of lobbying going on before the election, so I feel they are very effective and working hard for our benefit. They are a good organisation and they are doing a good job”.*

*“It is pretty good and applicable. People in government are not listening – She thinks they are working in Victorian times!”.*

However, AIC has faced challenges, not least the frequent changes in government ministers at Defra but also the fact that Defra appears to have a minor role in cabinet and the policy makers have limited knowledge of farming. Some Members feel that AIC needs to have more contacts in government at a high level because often their approach just results in delaying tactics rather than successful outcomes.

*“It has been witnessed but they are not succeeded in saving us. 'Having paid for a lifeboat, we now need it to come and save us”.*

*“They try but they can't seem to get to the right people”.*

*“I think we have definitely been trying to do that in a very difficult environment because everyone keeps changing. And I mean how many ministers have we had at Defra in the last five years - more than prime ministers even that's a challenge. So I'm not pretending at all that that's been an easy task for any lobbying or representative body and but that's where I think there's time well spent”.*

From Members in Wales and Scotland, AIC needs to have more influence with the devolved governments.

*“There is not enough UK wide and needs to be more in Wales with regard to getting the governments to listen”.*

AIC sometimes has to balance differing motives among its Members, which can limit its effectiveness.

*“I think the AIC do well but are hampered by the fact that not all members have the same motives so have to tread a fine line which would sometimes appear to be ineffective”.*

Several respondents praised AIC's efforts, describing them as "good," "effective," and "working hard for our benefit." And they are delivering on some specific issues.

*“Yes, in various areas. Sometimes, AIC's efforts have amounted to no more than delaying tactics. But in some cases, like the proposals on fertiliser regulations and manure spreading from a few years ago, AIC, along with other industry sectors, managed to bring some reality into the discussions. Hazel and her team have worked hard to involve legislators in understanding what happens on farms, which has made a difference in bringing common sense to the table”.*

*“Well, I know Robert and the team have had a lot of conversation with Defra about, SFI and the impacts and the roll out and - I think you know the challenge is we can only ask them to involve us so much, you know”.*

Robert and Edward at AIC were specifically mentioned as doing a good job and achieving the right balance across sectors.

A couple of respondents suggested that AIC needs to engage more with the public and raise the profile of farming and food production to create pressure on the government.

*“AIC needs to get the public on board. AIC need to make more noise to influence the public to then put pressure on the government. This in his opinion is the lacking piece of the jigsaw. He hasn't seen much activity in getting the public engaged”.*

*“I think the most frustrating thing for almost all farmers is that people, say that they've harmed the environment - they're trying to work with the environment every day to produce food for the consumer and then the consumer moans about the price”.*

Overall, AIC's activity is recognised, but Members see room for improvement in influencing government policy and public engagement.

While many respondents appreciate AIC's current efforts, there's a desire for more proactive, collaborative, and future-oriented lobbying, with a focus on key industry issues and improved public communication.

Most are keen for AIC to maintain lobbying as a high priority, emphasising the need to keep up the pressure, especially given the current political environment and potential new policies.

*“Use the Lords more!”*

*“Happy with the work the AIC is doing. With the new government and MPs in place following the election there is a lot of activity ahead”.*

*“A stronger line on removing and amending these damaging policies. We rely on the AIC to bring some sense to government”.*

*“I am not sure there is much more they can do, they do seem to be doing a good job particularly under the circumstances of a new government and the changes they are proposing”.*

*“No, they are pretty well balanced and the sector gets a relatively good hearing on what they are doing and proposing”.*

*“Up to date they have done quite well and they are good at prioritising”.*

Some respondents suggest that AIC should work more closely with other agricultural organisations like the NFU, CLA, and CAAV to present a unified voice, amplifying the message, increasing their influence and strengthening their position.

*“Working more alongside the other stakeholders so they all speak as one, NFU, CLA, CAAV, etc”.*

*“FSA are doing more - AIC need to be more active and get in front of the right people”.*

While some are satisfied with AIC's work and feel it is well-balanced across sectors, there are suggestions that AIC should strengthen its position as a thought leader, particularly in looking ahead to future challenges and opportunities for the industry.

*“I think we are the thought leader. We are the people that come to for information both domestically and internationally. To be honest, we need to keep strengthening that position and hopefully actually that then gives benefit to the Members”.*

Many respondents highlight the importance of lobbying around food security, particularly in light of geopolitical events like Brexit and the war in Ukraine, which have emphasised the UK's need for a strong domestic food supply.

*“Stress the importance of feeding the nation and also moving forward our efficiency”.*

*“Necessity of producing UK food and supporting UK manufacture”.*

*“I think it wasn't that long ago, probably just before Brexit really broke that plenty of people in Parliament would have thought that if we were like Singapore and we just imported all our food, that would be fine”.*

*“Getting AIC a place at the table. And for NPZ - and we've got an example of that with this. We were trying to do something on OSR”.*

There are calls for AIC to prioritise making the food chain more efficient and ensuring fair pricing for food producers as well as reducing unnecessary regulations and duplication of information

*“Ensuring fair pricing throughout the food chain”.*

Reduction of Red Tape: Reducing unnecessary regulations and duplication of information is seen as a crucial issue that AIC should prioritize in its political efforts.

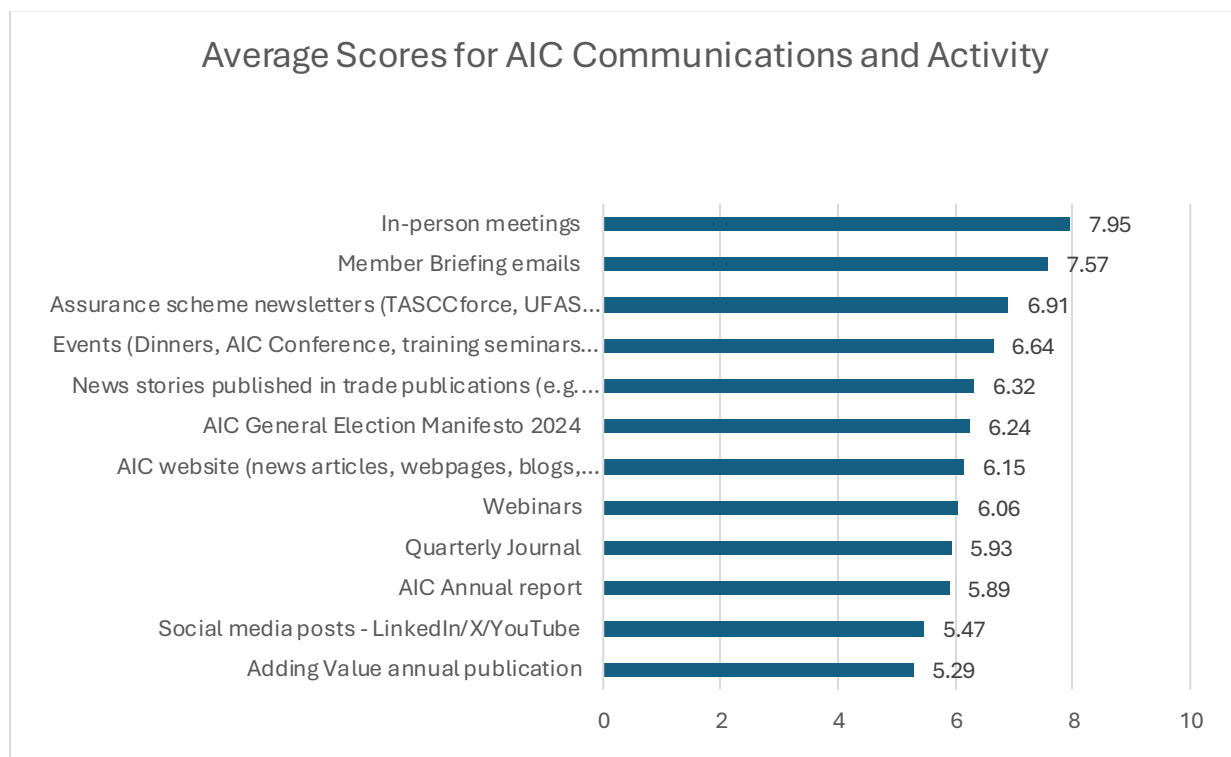
*“Reduction in red tape and duplication of information”.*

Several respondents feel that AIC should do more to engage and educate the public on agriculture and food production, helping to shift public opinion and put additional pressure on the government.

*“More making the public aware of agriculture and food production and helping industry communicate better with the public particularly as AIC spans so much of the industry and represents so many aspects of it”.*

## Question 24: Communication with AIC

Respondents were asked to score their responses on a scale of 1-10, covering various aspects of communication and activity with AIC.



Generally, communication is quite well regarded, some comments included;

*“The communications that we receive that are a value to our business are fine with the frequency and the content”.*

*“They are good at giving relevant information and keeping up to date in changes within the industry”.*

*“I think they asked in a previous survey of this nature and I think e-mail and text were the best ways of getting right into information. And I think they've done a better job at doing that. So there's been improvement there”.*

*“It's all about right and Robert, Edward and Hazel are doing a good job. Hazel is outstanding at the internal communications”.*

The respondents value in person meetings most and also named individuals as being very good at responding to direct telephone calls (James and Hazel). A few respondents felt that more localised in person meetings would benefit smaller companies, where

focused, and specialised advice could be sought. This was also a point raised on the 2020 survey by several respondents.

*“I find the best ways is the committee meeting - F2F is still the best way to communicate”.*

*“In person meetings would be useful if they happened more frequently”.*

*“Everything is fine, I don't have any issues. I talk to James regularly and he is helpful”.*

Member Briefing emails are valued in that they are frequent and up to date, if there is any criticism it is in that not all items are relevant to everyone and sometimes there is a lot to read. More sector-specific communications to avoid irrelevant information. A weekly summary would be better than daily briefings. This reflects some of the respondents' feedback from the 2017 and 2020 survey which also suggested the volume of information was too much and more streamlined and focused communication would be better received.

*“Very frequent updates and so it's hard to spot the important ones”.*

*“What is done is good, but I would like to see sector specific communications, extracted from the general 'publication' so you didn't have all the non-relevant information. I am in fertiliser, I don't need to know about what is happening with seeds ?”.*

*“There are too many member emails and it is difficult to know which are important and which are just general. It is confusing because there is so much information. 1 summary email each week would be more useful. United Farmers (a group of the farming co-ops do it really well with a Friday afternoon summary”.*

*“I think that we get everything that are not always relevant to us, so it can be a little tedious, even though they are clearly headed. Email bulletins are so frequent if feels that there are just too many of them”.*

*“The communication regularity is good, however the AIC is still slightly behind the curve at getting the information on hot topics out quickly enough”.*

The quarterly Journal and Annual report are less well rated, mainly because they are printed which incurs a cost and also because by the time they are printed they are out of date.

*“Comms that are designed to promote AIC or justify its efforts, whilst still being important, are never going to be quite as valuable”.*

*“The quarterly journal is a waste of printing costs and out of date by the time it arrives”.*

*“The biggest challenge for, let's say, the annual report or the quarterly journal is whether they get read or no because they are out of date now they're available online and I know we e-mail them to people and a lot of the time so do we need to print them?”.*

The election manifesto was well received by the Members except for a Welsh Member who said it didn't refer to Wales.

*“The Election manifesto was broad and UK wide and did not cover enough in Wales”.*

Some Members said there is a need to send the key communications (Briefing emails) to a number of people in the organisations not just one contact.

*“Multiple people and the right people in businesses are not seeing things because, if it's not set up properly, then I it comes to me it sits on my desk. I don't get time to read it. It goes in the bin”.*

More external communication, especially via the press and social media, to engage the public would raise awareness of AIC and the industry in general.

*“The pieces in the press and on social media could be more representative - they don't paint the merchants in a very good light and AIC could do more to counter bad press especially on Linked in and twitter (X)”.*

*“The younger people of today are much more engaged in that kind of stuff [social media]. And I think food resonates with a lot of youngsters. I certainly the surveys would say that 18 to 24 year olds are probably more engaged than that than they've ever been. So I think a body like ARC actually relating to them would be a really good thing to see”.*

*“We need the wider community to understand what we're trying to do to support, rather than all of us understanding it intimately and not communicating with them. So my criticism at communication is not really a communicating with the membership as such. It's just communicating more widely that we need to do”.*

*“We always talk and have done since I've been in this industry about trying to attract better quality, better calibre people into the industry and everyone says how difficult is to do that And yet we, haven't extended our boundaries very well and I think doing communicating better would help to achieve that”.*

*“It's important to be seen in front of certain people, and it gives credibility. I don't like social media in some respects, but I think the stuff that we do is pretty solid”.*

With regards to the website and consistency of branding, one respondent commented that the website is difficult to navigate (although this did come up in an earlier comment in the interview) and two people said they would like to see more consistency in branding on the communications.

*“Please standardise the AIC logo so we can have consistent member branding”.*

*“AIC has too many versions of core logo”.*

*“Website is not overly easy to navigate”.*

## Negative feedback for reference

The table below shows the negative feedback received from some Members on the database who declined to take part in the survey.

<b>Company</b>	<b>Action/Comment</b>
Tarmac	They are only members because they supply minerals for the animal feed industry. The contact said AIC is adequate for their needs but most of the questions are irrelevant to them so he did not wish to complete the survey.
Action farm	The key contact declined to take part because he said AIC are not spectacular and don't really bring much to the party and he did not have the time to spare.
J Saunt	They declined to take part as they have only been a full member for a few months and felt they had not yet seen the full benefits of being a member and would rather help next year when they are more aware of the positives of being a member
Adams and Green	A new contact at the company had no idea what AIC is. (they were sent a further email but still chose not to complete the survey)
Fielder nutrition	They have only been members for a week and have not yet looked at the website. It was too early for them to give constructive feedback - maybe next year!
Payne Crop Nutrition	They do not think they do enough for them with the amount of money they have to pay.
White Rose Agriculture	They said they are not keen on AIC because they don't do enough for the money it costs
Furness and South Cumberland Supply Assoc	The contact was not prepared to do the survey as what he has to say will not make any difference. AIC cannot control all the legislation that is coming in. They will stay as a member as they have been members for years and they do send through some useful bits. He felt a bit hounded to do the survey - it should be his choice (that comment was not aimed at Grounded Research!)
Dodds of Haddington	The key contact said it is a really stupid time of year for AIC to be thinking of doing a survey in the middle of harvest and he thinks surveys like this are a waste of time because you never hear back!!
Manor Farm Feeds	The key contact declined as he has never heard from the AIC until our call. His comment was "They take my money as I have to be a member, but it is not really suitable for a small company as they are more suited to multinationals and we have to jump through hoops at great expense to ourselves."
Elsoms seeds	The key contact felt it is the wrong time to be asking for people to complete surveys in the seed industry as they are very busy and may well get negative feedback
JS Corn Merchants	The key contact attempted the survey online but halfway through and got bored .

## Annex 1: Full comments in response to the open question asking for thoughts on AIC

*“Keep us compliant ensuring our industries voice is heard at a higher level”.*

*“We need to have a trade association to represent our distinctive views to Government and other stakeholders. These views do not necessarily align with the NFU or CLA although sometimes alignment is appropriate”.*

*“If we didn't have the AIC, we'd have to invent it”.*

*“Useful for documents and information about the different sectors, keeping up to date with any changes and for training”.*

*“Good representation of the industry across all levels. Useful help in schemes such as FEMAS”.*

*“The website could be more intuitive/easier to use and find help”.*

*“Keep XXXX informed on gov policy changes, actively lobby on our behalf, share data and info on the market, represent the industry as a whole and therefore coordinate members speaking with one voice... for the better of UK fertiliser industry & farming”.*

*“Information on legislation and issues in the industry”.*

*“Health and safety advice”.*

*“CCA support”.*

*“Legislation, lobbying, technical knowledge”.*

*“The AIC help us to keep abreast of the changes in the industry such as inhibitors, CBAM, Ammonium Nitrate etc”.*

*“It is very reassuring to know that AIC is monitoring the business landscape for us and keeping us up to date with the issues of the day”.*

*“Support our business though trade assurance by lobbying Government and competent authorities on our behalf”.*

*“Key in helping our business set up UKFFPA by supporting a secretary, administration and marketing. This is specific to our area of interest where there was a gap in knowledge shearing”.*

*“Member briefings are very useful. Lobbying activities do a good job of reflecting members and industry concerns”.*

*“Good helpful source of information and support the feed industry”.*

*“Good representation at government level”*

*“The AIC is a mixed blessing. I see the need for the organisation, because a representative body is necessary on a political level, to ensure checks and measures are in place when Government make policy. But how effective is the AIC at fulfilling that need? Reasonably effective but it could be better and meet the needs of these companies better. I would score them 6/7 out of 10 and this is probably as good as can be expected given the demands of government and political pulls”*

*“They have become a more bureaucratic organisation of late with more staff that are perhaps less motivated to work on our behalf, and also less efficient.”*

*“It’s an expensive organisation to be affiliated with. Especially for small and modest organisations. What do we get for our fees? Because of the cost, small operators are not all joining and are therefore unrepresented- an entire strata of the industry are under- represented. It’s a ‘big boys club’”*

*“I am fine with them and have no issues. They are in a difficult position with everything that is going on re Brexit and the new government”*

*“We have a good relationship with them that works fairly well but our turnover is as large across the 5 sectors as some of the big national crop protection companies and I feel that the big nationals get more attention. XXXX feel less important to AIC. They still value AIC because it gives them an interface with Government”*

*“I have had various communications with James McCulloch over the years and I think they work hard on our behalf and do a good job as far as they can”*

*“Most direction on the germination problem on beans which has been helpful in the last few years and oats a year or two ago”*

*“Lobbying updates around Brexit on import and export issues”*

*“AIC represents us when we need Government intervention. Lobby on behalf of seed industry with regards chemical usage/policy etc”*

*“I am on AIC committees and working groups – the information I gets is helpful although less so as they are equine specific and AIC tends to be agriculture focused”*

*“I am on the committee in Wales. I would have been indifferent 3 years ago because they were DEFRA focused but with AIC Cymru things have got better – I was instrumental in getting this set up”*

*“Updating ref government & NGO activities; contacts with the wider industry; lobbying”.*

*“They are primarily a lobbying organisation on behalf of the industry and the source of our contractual obligations relating to trade and compliance. Representing industry interests at Westminster and in Europe. Educating and updating on a political level, canvassing for research-based legislation and dealing with threats to our industry”.*

*“The are a leading industry trade association - ensuring we as members are fully up to speed with changes going on around our industry”.*

*“Trying to ensure that the industry is at the forefront of new developments, ensuring that government policy does not have a negative impact on our sector individually and also as a whole”.*

*“Provide insight into Government policy”.*

*“Educate and inform Agri business on legislative issues”.*

*“I know the AIC are there to support my business and to use as counsel or research, however I do feel like I don’t know how to get more from my membership. I do not consider that to be a failing of the AIC but maybe we should talk and or meet more often”.*

*“XXXX was Chairman of AIC from 2019 to 2021 and is still on the board so an enthusiastic supportive of AIC”.*

## Annex 2: Full responses to the question about the Government

*'Mainly, the politicians don't live in the real world. the system is that badly confused they can't see the woods for the trees. E.g. why do we have unemployment, when we can't get people to work ?'*

*"Labour doesn't even want to understand the countryside and takes food security for granted".*

*"Don't trust this Government".*

*"Complete lack of knowledge and understanding of the trade. Unrealistic targeting and ridiculous energy policy".*

*"They have a lot of other things to worry about and limited budget".*

*"I've heard minimal noises since the new UK government has been set up about promoting policies to increase food production and the use of fertilisers (which many other countries globally do)".*

*"I don't believe they will help Agriculture or small businesses".*

*"They do not support food production over 'the environment".*

*"The new governments seems to have no thought behind the knee jerk reactions which we are seeing".*

*"There would appear no focus on food production where as it is acceptable to abandon fields filled with ragwort which is a prohibited weed".*

*"Electric vehicles are not suitable for everyone, but they are happy to put pylons on good agricultural land".*

*"It is OK to have imported food which is grown in a non-sustainable way".*

*"Agriculture is devolved so the new UK Govt is less relevant to those of us based in Scotland".*

*"Still unsure what the policies are under Labour".*

*"No evidence as yet that they have a joined-up Agriculture strategy".*

*"You have got to believe they will be doing the right thing for the industry".*

*"Trust. How well are the government really interested in meeting producers' needs? Some of the policies of the previous government, coupled with BREXIT have caused great problems for farmers and growers particularly niche crops. These destructive policies have now been undertaken by the labour government. The SFI is problematic- bread crops are going to be eviscerated".*

*“There is a lack of direction for food security, and they cannot rectify what happened with Brexit.”*

*“The government are not focused on farming, funding is being stripped away and they are doing trade deals with other countries which affect farming. As said before, agriculture is treated a minor player”.*

*“We are a SME and the government has got a plan to extract a lot of money from us with regards to taxation”.*

*“We are concerned about the tax breaks for SME's being eroded and the changes in employee rights will have an impact on what we are trying to do”.*

*“A less friendly environment to run and own a business with the enormous changes to minimum wage and employee rights will have a huge impact on our business”.*

*“Wait to see. It is a lack of having a strong feeling, very early days for the government and a lot of work for them to do would like to remain open minded on how they are going to deal with things”.*

*“I'm unconvinced that having watched the priorities that DEFRA will be one of their clear priorities. It appears that there is little appetite for DEFRA to be a main government concern”.*

*“Don't know what will emerge yet. She will believe it when I see it - all governments are the same - make promises but don't deliver and then blame each other”.*

*“The government especially the Welsh (labour for 25 years) are totally out of touch in terms of food production and food security and hellbent on climate change issues. At a meeting recently I ended up talking about mental health charities in Wales and the Government people said mental health of farmers is due to crop failures! They haven't got a clue!”.*

*“I've seen many governments over my working lifetime, and they all promise much but deliver little. I'm sceptical that any of them will do us any favours. Farmers and those in the wider industry are great innovators, and it's up to us to make the difference. The government may make things easier or harder, but ultimately, they won't have a significant impact unless they take a very negative stance on an issue”.*

*“I don't think the government cares about our business at all. I don't think they have. I don't think it even moderately hits their radar at all. They have no awareness of concerns, even interest in our sector, to influence their decision making or what policy they're going to come up with. One of the things we talk*

*about a lot from a strategic perspective at AIC is trying to get a cross-party policy that looks to the future. So agriculture has something to plan against. So, because trying to run a farm in five-year sections is not very, easy. So, from an industry sector, whilst we may get some influence from a farm and growing food perspective, I think there's some awareness there but how the industry works and what it takes to make”.*

*“Well, in fairness, I have to be slightly open and honest and say that I am a paid up member of the previous outgoing government and I would probably have given them the same score anyway, so it's not necessarily an issue from a Labour government perspective however”.*

*“The challenge that we have in UK agriculture at the moment is quite straightforward it's with SFI”.*

*“It's it essentially was the vehicle to deliver farm support. By treasury”.*

*“And in my opinion, they've lost control of it completely, and this is where I'm a little bit at odds with Andrew Pearson by example in AIC because I don't believe that Defra are telling him the truth”.*

*“The numbers that they produce on how many hectares of SFI have been signed up for, I don't think are right”.*

*“And if I'm perfectly honest, I think they've completely lost control of it”.*

*“It is a detriment to the industry as a whole. You know, particularly when I look at the supply chain, as we would see it”.*

*“There's so many opportunities for the government to make SFI work”.*

*“For productive, sustainable agriculture, you know we can farm in a productive and profitable manner and look after the environment. It does not have to be one or the other, which is what really, really frustrates me”.*

*“And just some of the some of the things that they come up with are just absolute farcical”.*

*“You know and essentially, we've seen the reduction of the OCD rape area that will be pretty much all have gone into SFI. The other big part of our businesses, pulses - a lot of that is at risk to SFI because these break crops are more challenging for farmers and when the basic payment system was in operation, then there was always this bit of support. And actually what everybody seems to forget is that the basic payment gives consumer cheap food. And enables farmers to ride out the challenges of certain seasons with some of these crops”.*

*“And what they've replaced it with is essentially farming the environment and not being food producers. And I think this is the big challenge. You know that if we asked farmers five years ago, what do they see themselves as? Almost all of them would say they are, they are food producers. I'm very proud of it. You know, I think there's a there is a proportion of them every day wondering whether they're appreciated for what they do or whether they're here just to form butterflies and bumble bees and bearing in mind that, when I look at the challenge in OSR crop, you know we've gone from 700,000 hectares, which is probably too high anyway, but let's call it 500 to half of that probably this year, maybe even less than that. Well, the whole bee thing, there'll be much, there'll be a much lower bee population on the back of the fact there's just a huge loss of their pollen source. It's my big grumble. I don't like it. I think it's unfounded. I think it's the unintended consequence which has not been considered”.*

*“And that is all about short term reactionary. We need to get rid of this cash and we need to get rid of it now”.*

*“You know, we've spent years through seed certification, getting rid of some of these very, very challenging weed species. Now, pretty much paying farmers to reintroduce them. You know, we really ‘tried to remove hedgerows and all of this sort of stuff had a significant detriment. But we can definitely farm the middle of fields in a productive and sustainable manner”.*

*“We've we literally have just appointed a food Security Minister rather than a farming minister and essentially he is in charge of driving. But actually it's all about SFI, you know, and you think yourself, hang on a Sec. The title of your job is actually quite at polar opposites to what you're doing. We as AIC, we thought we actually did the Power and productivity report last year, looking at this, calling for an independent body to sit over government. To look at it on a sort of more long term holistic perspective, because government term is what it is and actually from a land use perspective, it's not long enough. You know if I if I look at unintended consequences you know we look at SFI purely on that basis, we're going to put all these weed species into the rotation. We're going to encourage a got. Oh and guess what, this year huge ergot problem. Big, big issue. Where's it all? Where's it all come from?”.*

*“I have recently met Daniel Zeichner and said he is talking about stability and consistency in agriculture so he has been reassured”.*

## Appendix 1:

### Questionnaire Template

#### **Q1 Please tell us about yourself where the information has not been prefilled**

- First name (1) \_\_\_\_\_
- Surname (2) \_\_\_\_\_
- Job Title (3) \_\_\_\_\_
- Contact Number (4) \_\_\_\_\_
- Email Address (5) \_\_\_\_\_
- Company Name (6) \_\_\_\_\_
- Membership Number (7) \_\_\_\_\_

#### **Q2 The agricultural sectors in which you trade**

- Animal Feed (1)
- Crop Protection & Agronomy (2)
- Fertilisers (3)
- Arable Marketing (4)
- Seed (5)

#### **Q3 Number of staff in organisation**

\_\_\_\_\_

#### **Q4 Please share some unprompted thoughts about AIC, how they support your business, their wider activity, and how they represent your interests**

\_\_\_\_\_

**Q5 Thinking of your overall experience of AIC, on a scale of 1-10 how likely are you to recommend membership to someone else in your position?**

- 0 (0)
- 1 (1)
- 2 (2)
- 3 (3)
- 4 (4)
- 5 (5)
- 6 (6)
- 7 (7)
- 8 (8)
- 9 (9)
- 10 (10)

**Q6 How aware are you of the following AIC work?**

Not at all aware (1) Slightly aware (2) Moderately aware (3) Very aware (4)  
Extremely aware (5)

Representing Members' interests with UK policymakers and working to ensure new legislation is pragmatic for the industry. (1)                                                  
                     

Working with and advising industry bodies (Stakeholders and Government) on issues that affect AIC Members. (2)                                                                     

Providing information and guidance to Members on legislation and industry issues via Member Briefings, webinars, website content, email instant news alerts/bulletin, social media (LinkedIn/X), mobile apps and AIC publications. (3)                            
                                           

Providing Sector committees and working groups to enable Members to be involved in AIC governance and decision making. (4)

Providing technical support through training seminars and online training modules. (5)

Providing business support (e.g. HR, H&S, Employment law etc) via the Business Insights e-Newsletter and Croner website. (6)

Providing a discounted contracts and arbitration service. (7)

Managing trade assurance schemes in the areas of feed assurance, fertiliser security etc. (8)

Display This Choice:

If The agricultural sectors in which you trade = Arable Marketing

Managing the Feed Adviser Register (9)

An Annual AIC Dinner & Conference which offers Members the opportunity to network with key industry figures and political representatives. (10)

**Q7 Of the AIC work you are aware of please rate them for:**

**Q8 Their importance to your business**

Not at all important (1) Slightly important (2) Moderately important (3)

Very important (4) Extremely important (5)

Representing Members' interests with UK policymakers and working to ensure new legislation is pragmatic for the industry. (x1)

Working with and advising industry bodies (Stakeholders and Government) on issues that affect AIC Members. (x2)

Providing information and guidance to Members on legislation and industry issues via Member Briefings, webinars, website content, email instant news alerts/bulletin, social media (LinkedIn/X), mobile apps and AIC publications. (x3)

Providing Sector committees and working groups to enable Members to be involved in AIC governance and decision making. (x4)                 

Providing technical support through training seminars and online training modules. (x5)

Providing business support (e.g.HR, H&S, Employment law etc) via the Business Insights e-Newsletter and Croner website. (x6)                 

Providing a discounted contracts and arbitration service. (x7)           

Managing trade assurance schemes in the areas of feed assurance, fertiliser security etc. (x8)                             

Display This Choice:

If The agricultural sectors in which you trade = Arable Marketing

Managing the Feed Adviser Register (x9)                       

An Annual AIC Dinner & Conference which offers Members the opportunity to network with key industry figures and political representatives. (x10)           

### Q9 The effectiveness with which they are delivered

Not at all effective (1)      Slightly effective (2)      Moderately effective (3)

Very effective (4)      Extremely effective (5)      Unable to comment as not

familiar with the service (6)

Representing Members' interests with UK policymakers and working to ensure new legislation is pragmatic for the industry. (x1)                 

Working with and advising industry bodies (Stakeholders and Government) on issues that affect AIC Members. (x2)                       

Providing information and guidance to Members on legislation and industry issues via Member Briefings, webinars, website content, email instant news alerts/bulletin, social media (LinkedIn/X), mobile apps and AIC publications. (x3)

Providing Sector committees and working groups to enable Members to be involved in AIC governance and decision making. (x4)                                           

Providing technical support through training seminars and online training modules. (x5)

Providing business support (e.g. HR, H&S, Employment law etc) via the Business Insights e-Newsletter and Croner website. (x6)                                           

Providing a discounted contracts and arbitration service. (x7)                       

Managing trade assurance schemes in the areas of feed assurance, fertiliser security etc. (x8)                                                                                                                           

Display This Choice:

If The agricultural sectors in which you trade = Arable Marketing

Managing the Feed Adviser Register (x9)                                                               

An Annual AIC Dinner & Conference which offers Members the opportunity to network with key industry figures and political representatives. (x10)                       

**Q10 Where you have given low scores on AIC work effectiveness:**

Please explain why and give some examples for how you would like to see these improved

---

**Q11 Where you have given high scores on AIC work effectiveness:**

Please explain why and give some examples of activity from AIC you would like to see

---

---

**Q12 Please explain briefly what difference AIC has made to your overall business performance, or what has been the ‘added value’ from your AIC membership?**

---

---

**Q13 Please rate the challenges identified as facing the industry based on the impact you believe they will have on your business in the next 1-3 years.**

Where 1 is no impact and 10 is large-scale impact.

1      2      3      4      5      6      7      8      9      10

Net Zero, Food Security, Land Use Strategy, International Trade agreements ( )

Material costs ( )

Funding for agriculture ( )

Research and development ( )

Policy and regulation ( )

Recruitment of workforce ( )

Retention of Workforce ( )

Carbon metrics ( )

**Q14 Are there any challenges your business is facing that have not been included? If so please add them and explain their impact**

---

---

---

---

---

**Q15 The challenge(s) you rated as having the greatest impact are:**

Please could you make suggestions on the kinds of ways you would like AIC to support you in facing these challenges?

**Q16 Which of the following sustainability practices or initiatives has your business implemented in the past year? (Select all that apply)**

- Developing a carbon reduction plan (1)
  - Developing a climate change adaption plan (2)
  - Reducing greenhouse gas emissions (3)
  - Premises (4)
  - Production processes (5)
  - Transport (6)
  - Using renewable energy sources (7)
  - Reducing water use (8)
  - Reducing waste and improving recycling efforts (9)
  - Utilising recovered or recycled materials within products (10)
  - Developing and reporting sustainability metrics (11)
  - Other (please specify) (12)
- 

**Q17 What are the primary barriers your business faces in implementing sustainability practices? (Select up to three)**

- Financial constraints (1)
  - Resource constraints (2)
  - Lack of access to sustainable technology (3)
  - Lack of national infrastructure (4)
  - Insufficient knowledge or training (5)
  - Regulatory challenges (6)
  - Market demand for sustainably produced goods (7)
  - Supply chain limitations (8)
  - Resistance to change within the organisation (9)
  - Other (Please specify) (10)
-

**Q18 What are your businesses top sustainability priorities for the next five years?  
(Select up to three)**

- Achieving carbon neutrality (1)
- Improving energy efficiency and reducing energy consumption (2)
- Reducing waste to landfill (3)
- Increasing the percentage of recovered or recycled materials in products (4)
- Assessing the environmental impacts of all products (5)
- Promoting regenerative agriculture practices (6)
- Increasing the adoption of precision agriculture technologies (7)
- Developing business level sustainability metrics and a reporting framework (8)
- Other (Please specify) (9) \_\_\_\_\_

**Q19 Please rate the following on a scale of 1-10**

1      2      3      4      5      6      7      8      9      10

How confident do you feel in the new UK government's policies aligning to the needs of your business? ( )

**Q20 Please rate the following on a scale of 1-10**

1      2      3      4      5      6      7      8      9      10

How would you rate AIC's strength in communicating the challenges your business faces at government level? ( )

**Q21 You mentioned your confidence in the new UK government was please could you elaborate on your thinking here and why you scored it this way?**

**Q22 Can you comment on the activity you have seen of the AIC to date in this area?**

**Q23 Is there anything more you would like to see AIC do in prioritising its political lobbying?**

**Q24 Please rate how useful you find the following on a scale of 1-10 with 10 being very useful. Please use n/a where you do not receive or engage with a particular communication type.**

1      2      3      4      5      6      7      8      9      10      N/A

Member Briefing emails ( )

Quarterly Journal ( )

AIC website (news articles, webpages, blogs, briefings, FAQs, and other resources) /  
Business Insights E-Newsletter / AIC News Bulletin weekly email ( )

News stories published in trade publications (e.g. AgriTrade News, Farmers Weekly,  
Scottish Farmer etc) ( )

AIC Annual report ( )

Adding Value annual publication ( )

AIC General Election Manifesto 2024 ( )

Webinars ( )

Assurance scheme newsletters (TASCCforce, UFAS Update, FEMAS Update, FIAS  
Update, FAR Update etc) ( )

In-person meetings ( )

Social media posts - LinkedIn/X/YouTube ( )

Events (Dinners, AIC Conference, training seminars etc) ( )

**Q25 Can you please offer comment on the communications you see from AIC, their value, their frequency, their content, what they do well, what could be better and any examples from elsewhere that you think they could learn from?**

**Q26 Thinking about when you are looking for information, would you say it is more proactive (you seek it out by contacting AIC or searching the AIC website), or more reactive (you see something that prompts you to engage further e.g. emails, social media, print publications)?**

- Proactive (1)
- Reactive (2)
- Both (3)
- Other (Please explain) (4) \_\_\_\_\_

**Q27 Have you accessed the member portal on the website to update your settings?**

- Yes (1)
- No (2)
- Other (Please explain) (3) \_\_\_\_\_

**Q28 Would you like the membership manager to pick up any details about your membership with you once the membership research is complete?**

- Yes (1)
- No (2)



**GROUND**  
RESEARCH

Grounded Research is a specialist market research agency operating the length of the agriculture, food and environment sector.

[groundedresearch.co.uk](https://groundedresearch.co.uk)  
[hello@groundedresearch.co.uk](mailto:hello@groundedresearch.co.uk)  
01487 822320