

ADDING VALUE

FOR AIC MEMBERS

2021 | Working in support of modern, sustainable, commercial agriculture



AIC SERVICES



Welcome

2020 was a unique year and I hope that it remains that way. In the spring of 2020, AIC switched its focus almost overnight from legislation and EU Exit to the Covid-19 pandemic.

We moved swiftly to represent the vital work of Member businesses to the food supply chain and ensure that front-line workers were granted essential worker status to continue their roles. It is a testament to the resilience and adaptability of our industry that we kept food on people's plates even when other parts of the economy were shut down.

While Covid-19 will continue to be omnipresent, it feels like 2021 will be a pivotal year for politics. A year when our industry voice is listened to more closely when it comes to the development of policy.

We know that the bedding-in of the Trade and Co-operation Agreement (TCA) between the UK and the EU will require much of our focus, as we support Members to adapt to a new way of trading. In the short term there is a lot to resolve with the TCA and its operation with Northern Ireland, as well as mainland Europe.

AIC will also play an important role on the Agri-food Trade Advisory Group by providing the UK Government with connections to industry, as it continues trade negotiations with other parts of the world.

We continue to strengthen our voice and influence with our devolved governments, which will help to ensure the agri-supply industry is well represented as new Agriculture Bills in Scotland and Wales are taken forward to reflect the needs of these countries.

The COP26 will take place in Glasgow in November, postponed from last year, and with the UK Government keen to show its environmental leadership credentials, this is an opportunity for the agri-supply industry to demonstrate its commitment to achieving net zero by 2050. The AIC's Roadmap for a Sustainable Food Chain will support our conversations with government and we will continue to highlight the progress and achievements made, as well as the challenges faced, by businesses across the agri-supply industry.

Whatever the challenges that lie ahead in 2021, you can be confident that AIC will continue to represent your business, provide Trade Assurance, and deliver the information and technical support that you need.

Robert Sheasby
AIC Chief Executive

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Policy

The Agenda for 2021

While the turbulence of Covid-19 and the EU Exit continue to require attention, it is important not to lose sight of other important policy areas in 2021. Governments in Westminster and the devolved administrations are pursuing a large number of ambitious policies so it's important that AIC is influencing effectively in these new policy areas. We will be keeping Members informed throughout the process.

In November 2021, the UK will host the 26th UN Climate Change Conference of the Parties (COP26). As a result, we can expect a number of policies from across Whitehall to appear throughout the year, including strategies on energy, carbon accounting, and net zero ambitions. This will align well with the AIC's Roadmap for a Sustainable Food Chain, and we will ensure that policymakers and ministers are fully informed of the agri-supply industry's commitments.

Linked to COP26 is the UK Government's ambition to introduce a new law of 'Due Diligence' on forest risk commodities, such as soya and palm oil. This will be enabled through the Environment Bill that will progress through Parliament in 2021. AIC is in regular contact with farming groups and Defra on driving legislation that is proportionate, and works effectively alongside the many existing schemes and activities for sustainable palm and soy in supply chains.

There are a number of other provisions that will be contained in the Environment Bill, including the establishment of an Office for Environmental Protection (OEP), which will have scrutiny, advice and enforcement functions. It also allows for the setting of long-term environmental targets in 'priority areas' of air quality, water, biodiversity and resource efficiency, and waste reduction, along with the production of statutory Environmental Improvement Plans. Net gain requirements, waste imports and exports, REACH powers, and water management are also included within the bill. AIC will be closely following its passage, and the secondary legislation that follows.



Policy

Considerable policy development and lobbying throughout 2020 resulted in a number of positive outcomes for the agri-supply industry.

For the first time since 1947, the UK now has an Agricultural Act. Lobbying from AIC helped to prevent a number of very harmful amendments from the Bill coming into law. Most notably, disproportionate restrictions on crop protection products. We can expect similar amendments to be made under the Environment Bill, and AIC will ensure that policymakers are informed using objective, science-based arguments.

Resultant new domestic agricultural support policies across England, Wales and Scotland will commence in 2021. AIC will continue to inform the work going into Defra on a range of new support policies – including the AIC's own test and trial – to demonstrate the importance of advice in delivering both public goods and agricultural outcomes together.

Working through the practical implementation of the UK-EU deal will also be a focus for the year ahead. AIC Members have reported facing difficulties, misunderstandings, and paperwork requirements on imports and exports which are entirely new. We anticipate further changes as the UK Government phases in checks on imported goods in April and July 2021. AIC will be regularly engaging with government departments to ensure that all of these practical issues are worked through and that we support our Members through this process.

Covid-19 will continue to feature throughout 2021. In 2020, AIC achieved full recognition across Whitehall and devolved administrations that agri-supply businesses are key to supporting the nation's supply of food. This resulted in the granting of key worker status, and a specific mention in law of the role of agricultural supply businesses, enabling them to stay open during various lockdowns. AIC's appearance on weekly roundtables with senior civil servants and ministers continues to be vital to ensure they are well informed about agri-supply industry concerns and experiences, particularly since the Government's responses to Covid-19 change by the week. We are now prioritising the improvement of testing, and eventual vaccination programmes, for AIC Members.



Further information:
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Wales

AIC is developing a greater presence in Wales and this will be assisted by the creation of a new Welsh Policy Manager position. This will help to ensure that AIC has a clear voice in Wales in time for elections in May and provide representation to the Welsh Assembly and stakeholders in the region.

AIC is already providing input to Welsh policy areas, including responding to the Welsh Government's agricultural white paper and consultation. The paper sets out that the Welsh Government expects to work closely with stakeholders to drive better uptake of CPD, precision agriculture and associated methods on farm, and that Welsh agricultural policy will be underpinned by a Sustainable Land Management framework from 2023 onwards, with BPS and other EU agri-environment schemes replaced with a single direct support scheme called the Sustainable Farming Scheme.

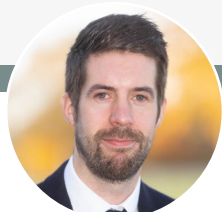


Scotland

AIC Scotland has represented Members' interests in a wide range of devolved policy areas, including strategic consultations related to reducing emissions, and developing new support mechanisms for Scottish agriculture.

AIC Scotland has also provided input to a range of other strategies which are of direct impact to members, including the QMS 2030 beef sector strategy and the Food Standards Scotland strategy, along with pressing the Scottish Government to prioritise critical workers within the industry for Covid-19 vaccination.

Ahead of Scottish parliamentary elections in May, AIC Scotland has produced a manifesto setting out the priorities of the Scottish agri-supply industry. This document will be used to influence key party figures as they develop their respective rural policy portfolios.



Further information:
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AIC Sustainability Roadmap

Our first AIC Roadmap for a Sustainable Food Chain has been well received. It provided assistance in helping to align thinking and jointly settle on a few leading performance indicators across the industry.

Every AIC sector supports the objectives of one another and we are more effective for aligning our communications and priorities. AIC, together with other farming bodies, are openly speaking with food processors and major retail brands to assist effective change within realistic timescales.

Our collectively agreed primary focus and goals for the next 30 years:

- £1.5 billion investment in future farm applied research, technology and innovation
- Ensuring diversity of seeds and seed traits to support the UK's sustainable food production strategy
- De-carbonisation of fertiliser manufacture, building farm production sustainably with soil health, farm nutrient balance, and efficiency
- Green energy at feed mills and maximum potential nutrient recovery from the food supply chain
- Greening of processing, storage and distribution of agri-supply materials while maintaining assurance standards
- Monitoring the footprint of UK crops and animal feeds compared to other parts of the world, to inform trading decisions and sourcing of raw materials
- Expanding the skill-set of our farm advisers to offer integrated farm and sustainable land management solutions.



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Delivering the AIC Sustainability Roadmap: Next steps

The AIC Policy Forum agreed that the Roadmap for a Sustainable Food Chain will be delivered through support for the following, interlinked, strategic routes.



Using this strategic approach to define priority work streams, AIC has identified a pathway to improve nutrient efficiencies on farm, which contributes to delivering the sustainability goals of production and farm/land management.



Achieving Farm Nutrient Balance

Our first campaign is to achieve Farm Nutrient Balance. This ambitious campaign starts with soil health and ends with sustainable food production. Our goals cannot be achieved alone, and we are working closely with complementary partnerships and initiatives to deliver this vision.

We will also be re-booting the Greenhouse Gas Action Plan Partnership, working with academic and industry partners to ensure common approaches to calculation of fertiliser and feed footprints, and regularly engaging with the WRAP forum, bringing together the food chain through the production, processing, retail and hospitality sectors.

Our campaign calls for action against three Key Performance Indicators:

1

Nitrogen Use Efficiency* (NUE)
for crops

2

Feed Conversion Ratio* (FCR)
for livestock

3

Farm Nutrient Balance* (FNB)
for the whole farm

Our campaign asks:

Government to recognise this commitment to leadership across the supply chain in its future policy making.

Government to support our fertiliser and feed producers with suitable UK energy and emissions trading schemes to facilitate their routes to de-carbonise fertiliser production and energy use at feedmills.

For the provision of carbon/environmental footprints for fertilisers and feeds by producers to inform the process of reducing the footprint of UK produced food.

Farmers, who require support with running their businesses, to use accredited advice to get the most out of their on-farm resources and bought-in goods and services.

Our farmers to place soil health and whole farm nutrient plans, including recycled sources, at the centre of their farm business to drive change and realise all the benefits available.

All parts of the food chain to make every nutrient and micro-nutrient in soil and animal feeds matter.

The whole food chain to consider new seed varieties, cropping patterns and animal genetics making advances in nutrient management possible.

For all recycled nutrients to be recovered effectively using Best Available Techniques.

For soil health and balanced fertility to support even greater Nitrogen Use Efficiency, improve Farm Nutrient Balance for Nitrogen and Phosphorus and to optimise animal Feed Conversion Ratios.

* **[NUE]** ratio between amount of crop harvested and amount of N applied. * **[FCR]** ratio of animal feed input to meat/milk/eggs output. * **[FNB]** estimate of N and P in feeds, fertilisers, and any imported manures/organic materials minus N and P in harvested crops, liveweight and milk exported.

Our vision is supported by a joint will across partner organisations and initiatives



• Tried & Tested initiative for nutrients

• Voluntary Initiative for Pesticides

• Championing the Farmed Environment

• UK Roundtable on Sustainable Soya



Animal Feed

2021 Outlook

AIC will continue to push for progress in recognising the contribution and vital role of workers in the feed sector, following the formalisation of key worker status for front-line colleagues in 2020. We will also be promoting the value of feed advisers, including their contribution towards a green recovery and our transition to a low-carbon economy. Their expertise will be crucial as UK agriculture forges its future outside the EU.



Nick Major,
Sector Chair Animal Feed



Objectives for 2021

- 1 Engage with UK Government and Food Standards Agency/Food Standards Scotland to manage UK legislative developments ensuring that industry interests are considered, including:
 - Developing a UK feed materials catalogue and register.
 - Engagement with UK Government on due diligence for companies handling forest commodities.
 - Engagement with Veterinary Medicines Directorate on medicated feeds consultation.
- 2 Launch Product Environment Footprint (PEF) methodology, and Global Feed LCA Institute (GFLI) database and tool, and promote its use.
- 3 Progress the delivery of sustainable soya in the UK feed industry.
- 4 Work towards academic accreditation for FAR.
- 5 Deliver Covid-19 guidance and maintain critical sector and key worker status for the feed industry.

Key achievements 2020

AIC contributed to successful lobbying from the aquaculture industry supply chain to secure continuity agreements with Iceland and Norway for confirmed tariff-free movement of fish feed exports. This included highlighting industry concerns to Secretary of State George Eustice MP, and providing detailed information on fish feeds and their ingredients to Defra's trade negotiating teams.

Without such agreements, AIC Members' trade to EFTA and EU states could have been disrupted, and the applied tariff rates for export of fish feed to Norway and Iceland would have been 42.8% and 52% respectively under WTO rules.



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FAR Update

AIC is helping to make feed advisers more accessible through the launch of the FAR Find a Feed Adviser tool in June 2020. This free-to-use tool is enabling farmers and farm managers in the UK, NI and the ROI to identify businesses who can provide a local feed adviser.

AIC is continuing to demonstrate the value of feed advisers through FAR case studies which showcase outcomes achieved on-farm as a direct result of the advice given, including improved levels of productivity, balanced with welfare and sustainability gains.



Further information:
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Crop Marketing

2021 Outlook

Throughout 2021, AIC will continue to engage with members and industry groups including UK Flour Millers, MAGB, and NFU, now that the AHDB has committed to taking the digital passport forward.

While the trade deal with the EU has removed the major concern about tariffs, it is not all clear sailing as we need to keep in mind potential divergences. As the EU plans to change contaminants legislation, AIC will work with the UK authorities to share UK industry findings so any changes are evidence based, supported by the science, and relevant for UK grain.

With the easier autumn planting conditions we hope and expect the 2021 harvest to be significantly larger than that of 2020.



Mark Worrell,
Sector Chair Crop Marketing



Key achievements 2020

A significant focus in 2020 involved engaging with government over the potential impact from grain tariffs in the event of a no-deal EU Exit. AIC made it clear in communications with government that such tariffs would cause substantial issues, and that any Tariff Rate Quota volumes that needed to be applied for, would be far below the UK's needs.

AIC also pressed for a correction to the early guidance around the Border Operating Model, which appeared to show a phytosanitary certificate (PC) was needed for the export of grains into the EU and vice versa. This requirement was not only unnecessary in EU law, but had it been allowed to remain in government guidance. It would have resulted in significant costs, confusion, and delays for the industry.

Lobbying by AIC achieved both the removal of the point in the guidance, and provision of letters from Defra confirming PCs were not needed for grain, to reassure the industry.

The impact of Covid-19 was also a cause for concern for the sector. Significant efforts were made to quickly implement the necessary health and safety requirements to keep grain moving, and keep livestock and people fed throughout the pandemic.

Objectives for 2021

- 1 Wider Member engagement on progressing the digital grain passport.
- 2 Engaging with Defra on improving crop data, with Member input.
- 3 Working with Government and stakeholders on future UK grain contaminants legislation and any potential divergence from the EU.
- 4 Launch latest AIC On-Farm Grain Traders iLearning and engage with Members on future content.



Further information:
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Crop Protection & Agronomy

2021 Outlook

Now that the EU Exit transition period has ended, UK regulators have the freedom to develop and interpret pesticide legislation in a new way that meets the needs of UK food producers. Rather than duplicate the EU approach, AIC will be championing a path which minimises risks to human health and the environment and meets UK Government ambitions within the 25 Year Environment Plan, including net zero carbon and sustainable food production

The Revised National Action Plan (for the Sustainable Use of Pesticides) launched in December 2020, provides an opportunity for AIC to continue to put our Members' views forward to ensure that UK legislation is fit for the future and the UK food production sector has more predictability on the future direction of both plant protection product availability, and alternative tools and techniques for control of weeds, pests and diseases.



Chris Clayton,
Sector Chair, Crop Protection
& Agronomy



Objectives for 2021

- 1 Engage with policymakers to ensure that members interests are considered in the development of UK legislation relating to the supply, storage and use of plant protection products and other methods of pest control.
- 2 Promoting the work of Crop Protection and Agronomy Sector Members in adding value to their client's businesses.
- 3 Demonstrating AIC Members' promotion of IPM on farm and horticulture holdings.
- 4 Promoting and championing the uptake of the Voluntary Initiative (VI) strategy and targets to 2025 agreed by sector members and VI sponsors.

Key achievements 2020

Lobbying by AIC of the Secretary of State on the importance of agronomists during the initial Covid-19 lockdown, when movement of people was restricted, allowed them to continue their visits to farms and horticultural growers. The vital role they undertake was acknowledged, together with storekeepers, delivery drivers, and others in the supply chain.

AIC developed a set of six infographics to explain the value these roles add to the supply chain to the public, policymakers, and other stakeholders. AIC and AIC Members are best placed to describe the vital role that agronomists, delivery drivers, storekeepers and others in the supply chain play in ensuring a resilient and unbroken food supply. Members are encouraged to use these infographics to support this message with all stakeholders.



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Fertilisers

2021 Outlook

The Government's consultation on reducing ammonia emissions from solid urea fertilisers, and its indicated preference for a ban, had a significant impact within the fertiliser sector and will continue to have ramifications into 2021.

The Fertiliser Executive Committee agreed that in order to effectively defend the whole industry against a ban on the use of urea, AIC should collaborate on a joint submission with other significant stakeholders, based around the principles of Nitrogen Use Efficiency (NUE), which involves demonstrating delivery through a combination of FACTS Qualified Advice and farm assurance auditing.

This counter proposal to the Government's position on the use of solid urea is the beginning of a negotiation with Defra. We are optimistic that by standing together as an industry we can eventually avoid an outright ban.



Sam Bell,
Sector Chair, Fertilisers



Key achievements 2020

The devastating explosion of 2,750 tonnes of ammonium nitrate in Beirut raised fears about similar stockpiles of the fertiliser in the UK. AIC represented the industry in a united front to the media, fielding inquiries and explaining the procedures in place to ensure a catastrophe like this cannot happen in the UK. In doing so, we reduced pressure on Member companies and took control of the flow of information, allowing the delivery of a measured, consistent, and reliable message on behalf of the whole fertiliser industry.



Objectives for 2021

- 1 Work with Defra to ensure proposed new fertiliser regulations meet UK industry requirements.
- 2 Seek to avoid significant UK regulatory divergence causing increased operating costs to UK industry.
- 3 Manage impacts and seek to mitigate UK Air quality impact on the sector as a whole.
- 4 Improve our external communications, demonstrating the benefits of fertiliser.



Further information:
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Seed

2021 Outlook

With the EU Exit free trade agreement only agreed in the last days of 2020, a large number of questions remain in the early part of 2021. At the time of writing, the EU had not reciprocated the UK's granting of equivalence for EU seed, and AIC will continue to impress on the government the importance of this being achieved, as well as working with our partner, Euroseeds, to lobby the EU so that imports can continue.

AIC strongly supports Members having the choice to use products which utilise gene editing, and throughout 2020, AIC joined other stakeholders including NIAB, NFU, BSPB and ABC, to press for this to be developed. The resulting government commitment in 2020 to hold a public consultation was therefore warmly welcomed. It is open until March 17th, 2021 and Members are strongly encouraged to put forward their views.



Chris Guest,
Sector Chair Seed



Key achievements 2020

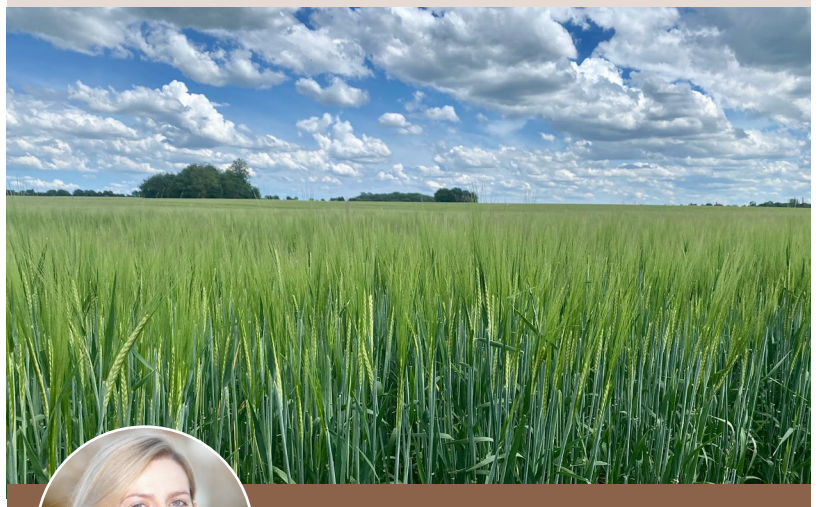
The seed sector showed its collective strength in overcoming significant challenges in 2020 due to the Covid-19 pandemic. This ensured that varieties for the future continued through the breeding process. Seed crops were inspected, harvested, processed, and delivered, to enable the whole supply chain to benefit.

AIC successfully lobbied Defra throughout 2020 on the importance to the industry of the 'temporary experiment' which allowed licensed inspectors to inspect a proportion of seed crops, rather than requiring an official inspector. After its expiry in 2019, the seed industry had to bear significantly higher costs of official inspections in 2020. It was important that any renewed experiment was carried over into UK legislation after EU Exit.

The AIC welcomed Defra's recognition of the experiment's importance in the UK and the renewal of the EU's temporary experiment, which became domestic law in England, Wales and Scotland on 1 January 2021 and lasts for seven years until 31 July 2027.

Objectives for 2021

- 1 Responding to the gene editing consultation. This is public and all Members are encouraged to put in their views before the March 17th deadline.
- 2 Working with Defra for clarity on seed marketing matters, including labelling.
- 3 Supporting certified seed.



Further information:
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Membership & Communications

2021 Outlook

The priorities for AIC Member support in the early part of 2021 will continue be Covid-19 and the UK/EU Trade & Cooperation Agreement. This will ensure an unbroken supply chain that allows farmers to manage their farming enterprises. AIC will continue to provide updates via Member briefings, webinars, and the AIC website.

COP26 in November 2021 also provides an opportunity for AIC to ensure the agri-supply industry is represented in the context of sustainability and the green recovery, and in step with the wider economy. The AIC's Roadmap for a Sustainable Food Chain will play a key part in communicating the industry's ambitions to domestic and international stakeholders.

Key achievements 2020

New website and CRM

The new AIC website was launched in September, providing improved functionality and easier access to content, which will be updated regularly. The website and its content will continue to be developed to support Members and express the work of the industry to external audiences.

Member Survey 2020

The Membership survey carried out in September to October 2020 provided valuable insight into how AIC can ensure it delivers a high quality of service and support to Members. The survey is conducted every few years and 73% of full Members took part in this important project.

A full summary of the Membership survey with issues and actions raised during the calls was distributed via a Member briefing. If you have not received this, please contact Tracy Smith.

Membership Visits

The Covid-19 pandemic affected AIC's ability to visit Members in person and we are reviewing the guidance in order to find a way to make these visits possible in the future. In the meantime, you can arrange a one-to-one by contacting Tracy Smith.

Agribusiness 2021 conference

Agribusiness 2021 was delivered virtually for the first time and saw a record number of registered delegates. High-profile speakers took to the virtual stage, including Victoria Prentis (Parliamentary Under Secretary of State, Defra) and Minette Batters (President of the NFU), with the conference theme of "Creating resilient and sustainable agri-food supply chains" echoed throughout the day.

Feedback from Agribusiness 2021 was excellent. We hope to return to a physical event this year to allow networking with other delegates and speakers.



Further information:
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AIC Services

Maintaining food and feed safety, and fertiliser security in a pandemic

For the majority of 2020, auditing of AIC Services' schemes was carried out virtually to accommodate Covid-19 restrictions. The Audit and Certification Body, auditors, and participants all responded positively to these very difficult circumstances, which meant we were able to maintain standards while protecting those involved. UK authorities were very grateful that we were still actively (albeit remotely) auditing Trade Assurance Scheme participants and continuing to ensure food and feed safety, traceability, and security of fertilisers. Our virtual approach was recognised by the competent authorities and UKAS, and we have kept in step with our European partners.

Although remote audits can never fully replace onsite visits by experienced auditors, remote auditing has a place in some circumstances and will remain a part of AIC schemes in the future.

AIC Services 2021 – the year ahead

We look forward to the return of in-person networking in due course, but for now all committee and working group meetings will continue to take place virtually via Teams or Zoom.

Sustainability continues to be a key theme across AIC. AIC Services is taking an active role to ensure that the agri-supply industry achieves its goal of reaching net zero agriculture by 2050.



Gill Barrow

Technical Manager for AIC Services
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New TASCC Codes

The new TASCC Scheme will be implemented on 1st April 2021. The review process that started in 2019 stayed on track via virtual review meetings during 2020. The scheme and supporting documentation was published on the AIC website on 1st December 2020 and submitted to UKAS for recognition.



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Continual Professional Development Training for Feed Advisers

The Feed Adviser Register (FAR) annual CPD for 2020-21 was launched at the beginning of November through the FAR online training portal.

This course studying antimicrobial resistance (AMR) and the role good nutrition can play in helping to reduce antibiotic use on farm was developed by industry vets and nutritionists. The course firstly considers how AMR develops, why it's a problem, and the national and international initiatives and targets implemented to reduce antibiotic use in livestock. For each livestock species, the course examines the challenges they face, and how good nutrition can form part of the solution to ensure animals remain healthy and build up immunity to disease.

Sustainability

Linked to delivering the ambitions within the AIC's Roadmap for a Sustainable Food Chain, the training for 2021-22 will study the sustainability challenges within the livestock sector and equip feed advisers with some of the tools they need to offer the professional advice their customers will be seeking.



Roberta Reeve

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New FIAS Standard

The FIAS Standard has been thoroughly reviewed over the past year by the FIAS Working Group, involving consultation with regulatory authorities and the fertiliser industry. Published on the AIC website in December 2020 and coming into force on 1st April 2021, the new FIAS standard has a new format, combining all previous standards and scheme rules into a single document, with revised wording to clarify particular issues and updated contact information.

FIAS and the Beirut explosion

The ammonium nitrate explosion in Beirut in August 2020 highlighted the consequences of poor controls and unsafe storage of this material. The FIAS scheme demonstrates the industry's commitment to safety, security, and traceability of fertilisers via the system of voluntary assurance of FIAS audits and certification.

Following Beirut, FIAS and the fertiliser sector continue to build on the systems in place to maintain public safety and security.



AIC adds value by



LOBBYING within the UK and Europe on behalf of the supply industry.



TECHNICAL ADVICE FOR MEMBERS on a sector by sector basis.



PARTNERSHIP with relevant organisations on common issues.



RAISING professional standards in trade assurance and advice.

*Working in support of modern,
sustainable, commercial agriculture*