

# ADDING VALUE

## FOR AIC MEMBERS

2020 | Working in support of modern, sustainable, commercial agriculture



Representing your business  
and delivering on your priorities

### ASSURANCE SCHEMES



# Welcome



This year will see AIC ensuring your business voice is heard on what matters; from future trade deals and new agricultural legislation to climate change challenges and sector-specific issues. Adding Value shows the depth and breadth of AIC's work across all sectors, confirming our members key role in a world leading food and farming sector.

We are reaching further than ever before on your behalf; hosting MP events in Westminster, encouraging greater interaction between MPs and Member businesses and engaging with MSPs and government departments.

A cornerstone of AIC's work will be mapping the supply chain's sustainability goals against the backdrop of new agricultural policy, the 25 year environment plan and a net zero carbon economy. With Member input we will develop "Roadmaps" against these goals for each sector. This will enable us to show Government where we think the "pinch points" will be and where assistance might be required.

Over the last year I am very proud of the work undertaken by the AIC on your behalf. With sector chairs guiding the priorities on behalf of Members, our sector heads and technical managers have achieved a great deal. For the feed industry we have helped avert significant cost to the supply chain, we have led the discussions on industry needs post-Brexit at numerous events, and we've strengthened the support granted by our training and assurance schemes.

As members, we hope that you will work with us in helping to shape our industry's future. This can be through sharing your input to guide government policy, to communicating with your MP about the importance of the supply industry to agriculture. Together we can shape the business environment for UK agribusiness.

Our collective future rests on the way in which we work better together and with those in government, wherever we are based. There are challenges ahead of course, and I'm sure Brexit will still be the cause of some uncertainty for many, however, we are here to support you.

May your business have a prosperous 2020 and we look forward to working with you.

*Robert Sheasby*

AIC Chief Executive

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# Policy

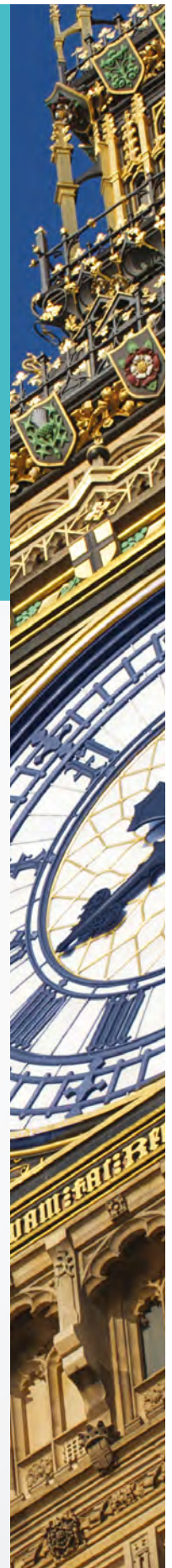
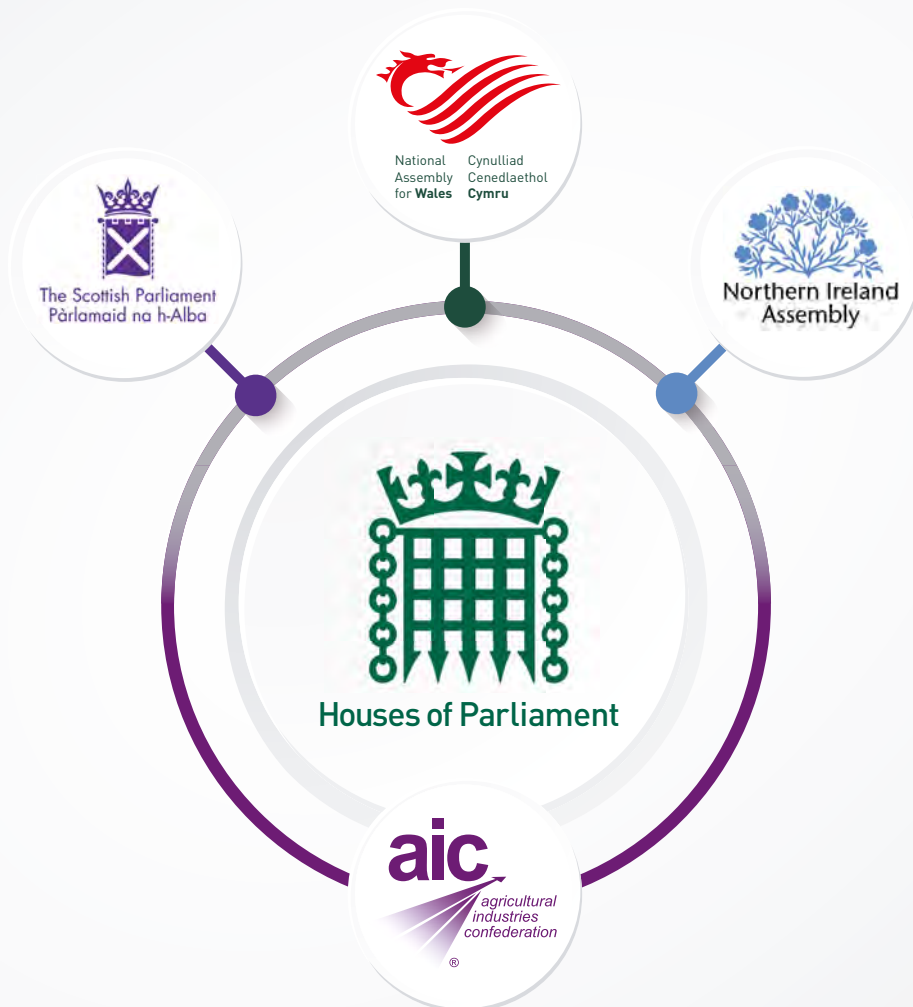
## The Agenda for 2020

One inevitable consequence of the signing of the EU Withdrawal Bill is that increasing regulatory and policy responsibilities will fall on domestic politicians in areas which have, for nearly 50 years, been the preserve of the EU Commission. Early submission of the Agriculture and Environment Bills back into Parliament alongside recommendations from the Committee on Climate Change means the policy train is moving at a significant pace. Increasing engagement with politicians in London, Edinburgh, Cardiff and Belfast, is therefore a key focus for AIC. In practical terms, this should also be a main focus for AIC Members as well. Make the most of this chance to engage with your local politicians and take an active role in shaping the agenda.

Whilst AIC has engaged in a number of specific meetings with Parliamentarians and Ministers, both in England and Scotland, the focus will remain equally targeted at Members of the UK Parliaments and Assemblies. These politicians will be taking decisions directly related to Member businesses and we know engagement with agri supply trade expertise will be welcomed.

A key objective for AIC is ensuring politicians can not only build their understanding and knowledge around agriculture, horticulture and the supply industry, but also know they have an expert resource available to them. We have always sought to forge strong links with Government, but in 2020 this will be more crucial than ever.

AIC's target Members of Parliaments and Assemblies throughout the UK



## Recent AIC Actions

### Parliamentary Dinner

The AIC Board held a Parliamentary Dinner in early September as part of this engagement process. A very successful event, helping to underline to Board Members the importance of the relationship between Politicians and their Constituents whether as individuals or businesses, and the need for agri-supply chain businesses to engage if they want to be heard.

### AIC Manifesto

The AIC Manifesto, published ahead of the 2019 General Election, was specifically intended to have a life well beyond the campaign period and Members have been encouraged to use it as part of their engagement with constituency MPs through meetings and visits.

The manifesto sets out a list of aims and priorities for the agrifood-supply industry. Intended as a guiding document for government and other key stakeholders, the manifesto outlines a framework for future initiatives and a basis for collaboration to build a sustainable and productive future for all.

In particular, there remains a need for the production of healthy and nutritious food, whilst addressing wider issues such as climate change, productivity, waste management, and resource protection in line with consumer expectations, regulatory demands and business needs.

### What does this mean for your business?

Member businesses will see future regulatory and policy developments now under UK rather than EU control. Engaging with policy makers is therefore crucial in establishing a landscape which allows businesses to operate successfully. For individual Members, the benefits of establishing direct engagement with your local parliamentary representative is invaluable to developing greater input into the decision-making arenas.

This progressive engagement alongside AIC's continually growing traction with legislation and key influencers will ensure our Sector's voice is a powerful source of exposure and guidance as we steer our way to a brighter more sustainable future.



David Duguid MP



Angela Smith MP



Sir Henry Bellingham MP



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# Industry Sustainability Roadmaps

AIC is working with members to plan a direction of travel

**With Government setting out its commitments for the long-term – in the form of net zero carbon by 2050, an industrial strategy driving technological innovation and the cross party signed, 25 Year Environment Plan – AIC is equally keen to stretch its own proactive approach from a 5 to 25 year span.**

Our Members know that sustainability has to be understood in its widest sense: not solely focused on the environment in isolation but appreciating the links with the economy and social expectations – and the vital need for natural resources in sustaining life.

As we begin this next decade, we will therefore start to shape our longer-term vision sector by sector with a view to an overarching plan linking with the goals of those we work with and support in the farming community.

Our roadmaps will be based on the principles of the wider UN Sustainable Development Goals, but focusing on the following seven goals which are especially relevant to our industry.

Sector committees are currently considering how the roadmaps can serve as a basis for all Members to find their part, plan for the challenges ahead and grasp the opportunities that change inevitably brings. The following two pages show the backdrop for our work.

## AIC business links to Sustainable Development Goals

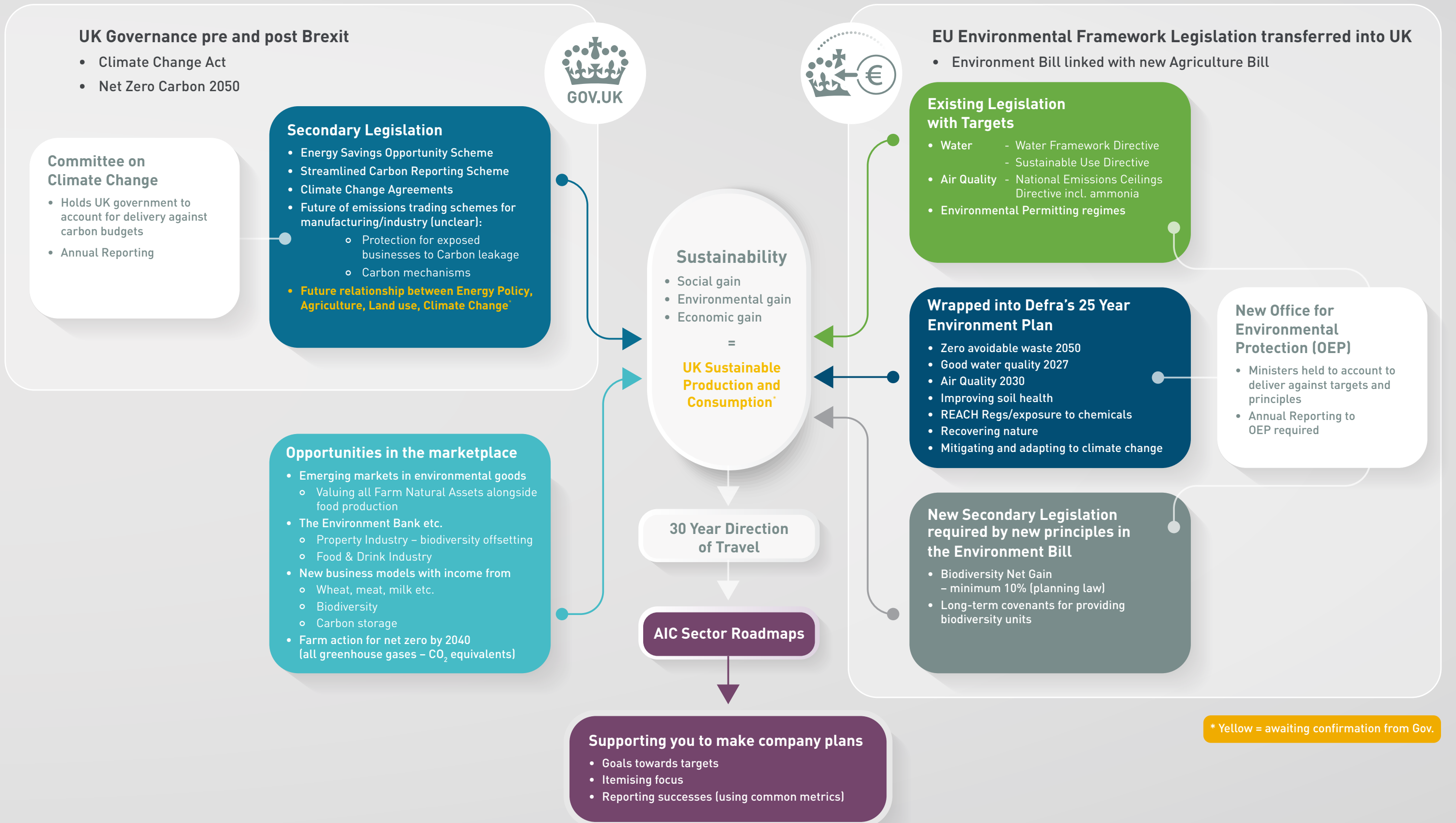


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Ref: UN Global Sustainable Development goals



# A picture of the future – helping you to plan ahead



# Animal Feed

## 2020 Outlook

In 2020 we will see the continued rise of social movements critical of agriculture, and the urgent need to both achieve and demonstrate sustainable sourcing. The successes we've had this year demonstrate the transformative power the industry can wield when it comes together for a common cause. The important thing is that we rise to these challenges and remain an active participant. As with our work on the Maleic Hydrazide (MH) issue, collaborative and proactive responses will be required. I'm confident that 2020 can be a strong and prosperous year if we work together and make our voices heard.



**Angela Booth,**  
Sector Chair Animal Feed



## Objectives for 2020

- 1 Developing the Feed Sector sustainability roadmap. Members can support this by demonstrating their sustainability actions and credentials
- 2 Creating and communicating a library of facts and figures alongside stakeholders for Members in the Sector to better defend the challenges from media and NGOs on meat and livestock products and feed
- 3 Make key government stakeholders aware of the Sector's priorities, opportunities and challenges in the light of Brexit, new agriculture & environment policy and forthcoming trade deals
- 4 Develop a communications forum for younger feed industry professionals

## Key achievements 2019

AIC had many successes in 2019 but we highlight one in particular to demonstrate the value of working together. This relates to potato production and the renewal of Maleic Hydrazide (MH) a crucial active to control sprouting in potatoes.

### AIC in Action

When the dossier for Maleic Hydrazide (MH) was submitted to renew EU approval, there was insufficient data for the European Food Safety Authority (EFSA) to complete a risk assessment on the safety of feeding treated potato products to livestock. As a result the Chemicals Regulation Division (CRD), proposed that any MH products sold from 1 November 2018 should carry a label stating that treated crops should not be fed to livestock, until approval holders had undertaken trials to generate the data required.

AIC provided data to a UK impact assessment that showed up to 1 million tonnes of potato products being lost to landfill, representing a value of £55,820,000 per annum. In addition, the UK feed industry would need to find replacement feed materials to make up this nutrient shortfall calculated at an additional cost of £8 million per annum.

An economic impact assessment and infographic showing the diversity of entry points for potato products entering the animal feed manufacturing supply chain was shared with the Maleic Hydrazide approval holders and presented to CRD and Defra by AIC and UKFFPA representatives. It was also shared with FEFAC and stakeholders in several member states as a template for preparing impact assessments for their home markets.

AIC went on to lobby Defra, CRD and ministers to delay implementing this restriction until necessary studies to fill data gaps had been reviewed by EFSA. At the end of June, CRD concluded, on the basis of data recently acquired from the approval holders and the risk assessment, that applying the restriction was not appropriate.



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# Crop Marketing

## 2020 Outlook

The impact of the bad weather of autumn 2019 is yet to be truly known, but clearly 2020 harvest will be reduced. Whilst there is more political clarity in the UK, this is not necessarily the case for overseas customers, meaning there could be confusion about what information the UK does and does not need to provide. Changes in mycotoxin legislation at EU level are expected, so vigilance will continue about what this means for grain marketing, and globally innovations around gene edited crops (seen by the European Union as GM) could become relevant to the supply chain.



**Mark Worrell,**  
Sector Chair Crop Marketing



## Key achievements 2019

AIC has long been a strong supporter of a digital grain passport, and in 2019 AIC, alongside nabim and the NFU, took a lead in revisiting the project. The Arable Marketing Committee believe that a system of paper passports and stickers is not fit for purpose in delivering to the requirements of a modern industry.

This industry collaboration alongside NFU, nabim and MAGB has led to the agreement from the Cereals Liaison Group to look into the detail of how to take it forward. The main goal is to replace the paper passport with an electronic version providing the flexibility to offer more options in the future. This work will continue through 2020.

Constant scrutiny is required on contaminants legislation, and regular input of data and concerns from Members is both needed and welcomed as pressure from legislators continues to focus on a reduction of contaminant levels in grains and processed products. As it is an evolving situation, AIC regularly communicates the changing requirements and legal limits to Members. This vigilance is important to stop problematic issues becoming embedded. For example, in an early draft of legislation a limit for ergot alkaloids in unprocessed grains appeared. AIC spotted this and lobbied hard and successfully for its removal.

The logistics of managing the significant 2019 cereal crop brought challenges, but harvest 2020 looks set to be very different.



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## Objectives for 2020

- 1 Engaging in the opportunities and challenges presented by the Agriculture Bill and Brexit
- 2 Progressing the Digital Grain Passport
- 3 Considering trade implications of crops from new plant breeding techniques
- 4 Continuing to engage on grain contaminant (eg. mycotoxin) levels and implications for Members
- 5 Continue engagement in optimising the assurance schemes



# Crop Protection & Agronomy

## 2020 Outlook

The focus on the use and impacts of plant protection products (PPPs) will continue to attract media attention. It is clear that the direction of travel within the EU Commission is to reduce the use and risks of PPPs. Closer to home, UK Government has indicated a desire for PPPs to be used more judiciously as part of an Integrated Pest Management (IPM) strategy. The year ahead will be one of steering opinion, providing sector members the opportunity and materials to steer opinion, by demonstrating all the work that AIC Members do to ensure PPP use has minimal impacts on the environment.



**Chris Clayton,**  
Sector Chair Crop Protection  
& Agronomy



## Objectives for 2020

- 1 Develop messages, materials and infographics in conjunction with the Communications Group to explain the work of sector members and how that contributes to responsible use of PPPs
- 2 Liaise with relevant UK Ministers and competent authorities to describe how UK legislation can be more effective and efficient following EU exit
- 3 Increased liaison with consumer facing industry stakeholders along the supply chain to help them better understand PPPs recommendations from an agronomist perspective
- 4 Promote and champion the work of the revised Voluntary Initiative for Pesticides (VI)

## Key achievements 2019

AIC Members perform an important role in the safe storage and supply of 90% of PPPs to UK farmers and growers. In addition, AIC agronomists supply high quality technical advice to their clients to ensure that they farm in a profitable and environmentally sustainable way.

During the year significant numbers of CRD and Defra staff have been invited to visit AIC Members distribution stores to see first-hand the professionalism and expertise of a typical distribution business. This included an overview of the roles of storekeepers and delivery vehicle drivers and the extensive training undertaken by these individuals to ensure that plant protection products are stored and delivered in a safe and secure way.

Visitors were also given an opportunity to view delivery vehicles and the safety features required to ensure loads are secure during transport.

Finally, BASIS qualified agronomists explained how they helped clients to maintain a profitable and sustainable business, whilst looking after the environment.

Visitors recognised the work done by Members and acknowledged that they were now better placed to make informed decisions about the need for further checks or controls around the storage and supply of and provision of advice on plant protection products.



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# Fertilisers

## 2020 Outlook

In 2020 a key focus will be on the UK's commitment to achieving net zero carbon by 2050 – something to which our Sector is particularly involved.

We will be ensuring Government departments and BEIS and Defra ministers understand the need to urgently review carbon emission trading mechanisms, to avoid UK and European nitrogen production being disadvantaged running the real risk of unintended carbon leakage.

We will also be developing our Sector roadmap supporting sustainability goals for business, society, and the environment. Essential to this will be setting out the means by which we monitor and report success. This will dovetail our efforts alongside the farming community to reduce farm greenhouse gas emissions, through increasing Nitrogen Use Efficiencies and a fresh focus on soil health.



**Peter Scott,**  
Sector Chair Fertilisers



## Objectives for 2020

- 1 Continue to engage with Government on the development of policy for air quality, nutrient management and mineral fertiliser use and secure opportunities for the Sector in meeting environmental credentials
- 2 Continue relevant input into the development of the Agriculture Bill, Environmental Land Management (ELM) and to the delivery of the 25 Year Environment Plan
- 3 Invest time in improving our communications and develop assertive but positive promotion of the Sector and its Members
- 4 Review our sector structure to ensure that it is fit for purpose and to make the most of the opportunities and challenges ahead.

## Key achievements 2019

We began work on improving how we tell our story to a wider audience.

We have set up focus groups to look at special interest topics for Members, including blenders and liquid fertiliser interests. These have been well received.

We are also working hard within the regulatory and standards setting agencies to ensure that AIC Members' views are fully represented. AIC took on the chair of BSI as part of a long-term strategy to consolidate influence. We will be hosting the European Standards Agencies in 2020 as a move to strengthen our ties with European colleagues post-Brexit. We also look forward to taking the Chair of EFBA (European Fertiliser Blenders Association).

We further developed our online statistics processing for participating Members. If you're a producer member and not already on board, please get in touch so you can benefit from these monthly market statistics.

### AIC in Action

This year we opened our doors to Defra officials from both the fertiliser and air quality team, to work with AIC's Agriculture & Environment Committee. The aim – to drive down both ammonia and nitrous oxide emissions from mineral fertilisers without pollution swapping.

This year's FACTS training theme on reducing emissions to air and carbon footprints is a timely example of how policy expectations are being delivered on the ground by over 3,000 FACTS Qualified Advisers, working with farmers to deliver productivity and emission reduction goals.



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# Seed

## 2020 Outlook

The priority this year will be to guide members through changing requirements brought about by both Brexit, and the Smarter Rules for Safer Food regulatory package. Whilst 'equivalence' is essential to the export of seed to the EU, what the seed industry needs to do outside the EU will continue to evolve. To that end, engagement will continue with Defra and APHA to highlight industry realities. The loss of major seed treatments could be felt keenly this year, but new plant breeding technologies and opportunities will continue to evolve and be supported and, as always, what happens with the weather will remain a challenge for all.



**Chris Guest,**  
Sector Chair Seed



## Key achievements 2019

A no-deal Brexit would mean that it would not be possible to export seed to the EU without regulatory equivalence, a fact AIC ensures Defra understands. At the same time AIC has continued to advise Defra that the UK must continue to recognise EU certified seed - reflecting the commercial realities of seed imports and exports.

On the issue of erucic acid in vegetable oil, AIC were very active in providing expertise and industry engagement on the importance of using certified seed at drilling 2018. The messages around this success, in terms of testing seed, or using certified seed with its erucic level available on request, was promoted again in 2019 and drove positive uptake.

We continue to work with the British Society of Plant Breeders, and the European body Euroseeds, which promotes the interests of plant breeding and lobbies on the importance of seeds treatments. The ESTA scheme covers quality assurance for seed treatment and treated seed, and cross industry support is needed to ensure we properly manage those we have left and support the applications for new products. By the end of 2019 there were 25 ESTA approved sites in the UK demonstrating the strong commitment in our industry to safety and quality.

Globally the speed of gene-edited crop development and hybrid breeding is racing ahead. AIC Members deserve the right to take advantage of these advances. AIC will continue to engage in supporting the development of these for UK use.

## Objectives for 2020

- 1 Protecting and enhancing the reputation of certified seed
- 2 Supporting advances in seed breeding, in policy and practice
- 3 Working with Defra and the Animal and Plant Health Agency, ensuring that AIC Members views are fully represented and policy makers understand the realities of the seed industry
- 4 Engaging in the opportunities and challenges presented by the Agriculture Bill and Brexit



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# Membership & comms

## 2020 Outlook

As we enter a new decade, it is more important than ever that industry unites to face the challenges – and opportunities – that await us. We have a significant programme of events and communications throughout 2020 culminating in our Agribusiness conference in November. Our website is being re-developed following feedback from Members to improve its content, usability and ensure it provides the right messaging for our wider audiences.

## Key achievements 2019

During October and November, AIC held seven Regional Feed Sector meetings throughout Great Britain and Northern Ireland.

The meetings were designed to build engagement and offer a full industry update from AIC, together with updates on a number of our trade assurance schemes.

If you would like AIC to arrange a regional meeting within your Sector or location – or if you have any further ideas on how we can increase engagement on a more regular basis – please do let us know.

### Membership Visits in 2019

In 2019 I visited over 40 businesses. Having the opportunity to meet with members has been an amazing experience resulting in many very open and honest conversations. All feedback has been taken on board and, together with my colleagues we will seek to implement the changes and ideas that have been shared during this process.

### Agribusiness 2020 Conference

This year's Agribusiness Conference in Peterborough saw multiple industry experts address some of the biggest questions facing UK agriculture. The message was clear that a robust agriculture and food strategy that delivers increased productivity and environmental protection is essential for the future prosperity of the industry.

Stuart Roberts, Vice President of the NFU, outlined the scope of the challenge: *"In the next 30 years, we have to produce the same amount of food we've produced in the previous 10,000,"* said Mr Roberts. *"It's a massive challenge, but a massive opportunity for British agriculture. Our high standards are critical for the future of British agriculture. We must be part of the solution, not seen as the problem."*

Allan Wilkinson, Head of Agriculture at HSBC, praised the industry's strength while issuing a call for greater progression. *"We are in slightly troubled times, but the economy has been remarkably resilient,"* said Mr Wilkinson. *"We face an enormous change in our operating level and have to help all businesses understand where they are and how to improve. The industry is going to face a lot of change. What an opportunity we have to get it right."*



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## Assurance Schemes

### AIC Services 2020 – new decade, new opportunities

Hot off the heels of a busy year in AIC Services, the organisation is looking forward to a productive 2020, as the environment changes in a post-Brexit UK. We work hand in hand with AIC to ensure that any new policy decisions are reflected in both current and future services offered by the organisation.

2020 will see the start of the NEW unannounced/short notice audit programme in the feed schemes. This is in response to stakeholders' requests to ensure that the schemes are more robust and able to detect any areas that may compromise feed and food safety. This programme will begin from Q1 2020.

FAR will be launching the feed adviser register from March 2020. This will significantly boost the profile and accessibility of FAR companies with farmers being able to find their nearest feed adviser quickly and easily.

TASCC and FIAS will also be undergoing reviews of their scheme standards to ensure that they remain fit for purpose. This programme will be led by the AIC Technical Managers, with full industry and stakeholder support.

Lastly, sustainability will be at the forefront of our minds this year, as a major focus for both AIC and AIC Services. To support this, AIC Services launched the Palm Oil Credit Scheme last year. Feed Members are urged to use this service and support the use of sustainable palm oil within the Feed Sector.

We look forward to the new challenges and opportunities ahead, and pledge to continue our dedicated support for the agri-supply sector.



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#### Feed Sector: Launch of Palm Oil Credit Scheme

The UK government has a target of using 100% sustainably sourced palm oil by the end of 2020 – APOCS (AIC Services Palm Oil Credit Scheme) was launched in August 2019 to help the feed sector achieve this. The scheme purchases RSPO (Roundtable on Sustainable Palm Oil) Credits for palm oil on behalf of AIC members or assurance scheme participants, giving the feed sector evidence they are purchasing sustainable palm oil. RSPO is the major organisation working towards increasing the global supply of sustainable palm products. The funds go directly to supporting the development of sustainable production of palm oil.

Retailer and consumer awareness of the effects of uncontrolled palm oil production on land use, deforestation and biodiversity has significantly risen in recent years, with regular articles and documentaries in the media.

#### FIAS: Launch of Merchancing i-learning

2019 saw the launch of the latest FIAS i-learning module in the series. Developed for merchants, this easily accessible course covers general background and information on fertiliser legislation, security, safety and traceability requirements, as well as particular information for those involved in sales, trading and distribution of fertiliser products. The next module for fertiliser storage will be launched in early 2020.

The web-based courses can be accessed via desktop or smartphone. For further information, contact [uk.feed@kiwa.com](mailto:uk.feed@kiwa.com) or call **01423 878873**.





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**FAR Update**

As of the beginning of January, 294 feed advisers have successfully completed the “Maximum Permitted Levels” online training module and assessment. Users have until the end of April 2020 to complete the training. This training is with the new provider, VBMS, who are sending out regular reminders regarding completion.

In 2019, FAR attended livestock events across the country and will be present at many events in 2020.

The “Find a Feed Adviser” online tool allows farmers to search for a feed adviser by county and species. So far, 63 companies have provided feedback and are willing to take part. Regular reminders are being sent out and the tool is expected to launch very soon.



**Garry Rudd**

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**RED renewal**

RED is the EU Renewable Energy Directive which monitors inputs into biofuel/diesel production and came into force in June 2009. To facilitate this, AIC has had its new RED appendix within TASCC and UFAS approved by the EU until 30th June 2021.

**Launch of CPC TASCC Training**

In response to participant demand, AIC have announced the launch of a TASCC Driver Certificate of Professional Competence (CPC) course to be delivered by Kiwa Training. This is a legal requirement for all drivers. The course is designed to follow the TASCC Haulage Code of Practice as well as promote driver safety at intake/outloading sites. Completion of the TASCC CPC course may be used as training at the AIC audit. Courses can be organised at training venues near Member companies’ own premises.



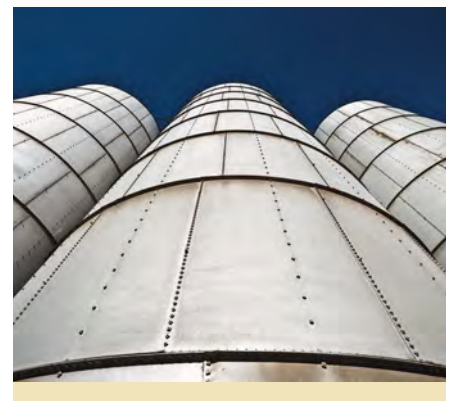
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**UFAS Update**

UFAS (Universal Feed Assurance Scheme) has a central role ensuring that feed safety is maintained, but also allows participants to demonstrate to authorities and other stakeholders that their product is safe. The UFAS Standard was redrafted during 2019 to ensure that it remained up to date with current legal and industry requirements, and in the process aligned the format and wording more closely with FEMAS (Feed Material Assurance Scheme). The approach was also updated to focus on “outcomes” rather than prescriptive requirements.

This approach by AIC will ensure that businesses are free to implement processes and procedures that produce safe feed while suiting their specific circumstances.





## 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 advice

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