

Driving a step change in the value of the levy

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Agriculture & Horticulture Development Board

Good progress.....

Much more to do

Fitter for the future

But we still have challenges....

- Getting farmers/growers to engage
- Driving change in industry
- Making a positive impact

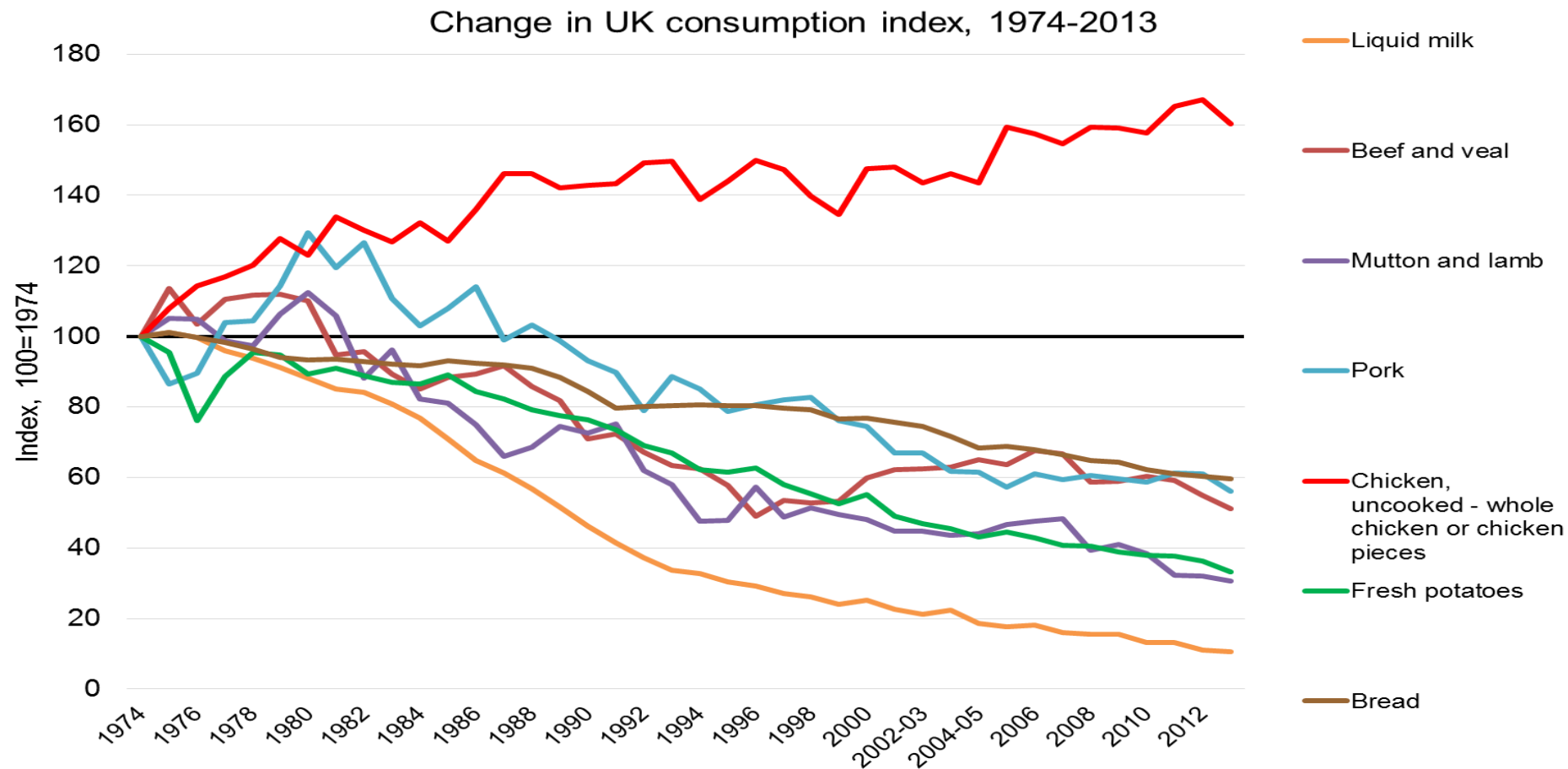


AHDB is unique.....

- Funded by the industry for the industry - £56m levy income
- Unique blend of services and capability
- Servicing six sectors -72% of UK agricultural output
- World class expertise in science and export marketing
- A workforce of 400 talented and committed specialists
- An unrivalled network of international contacts

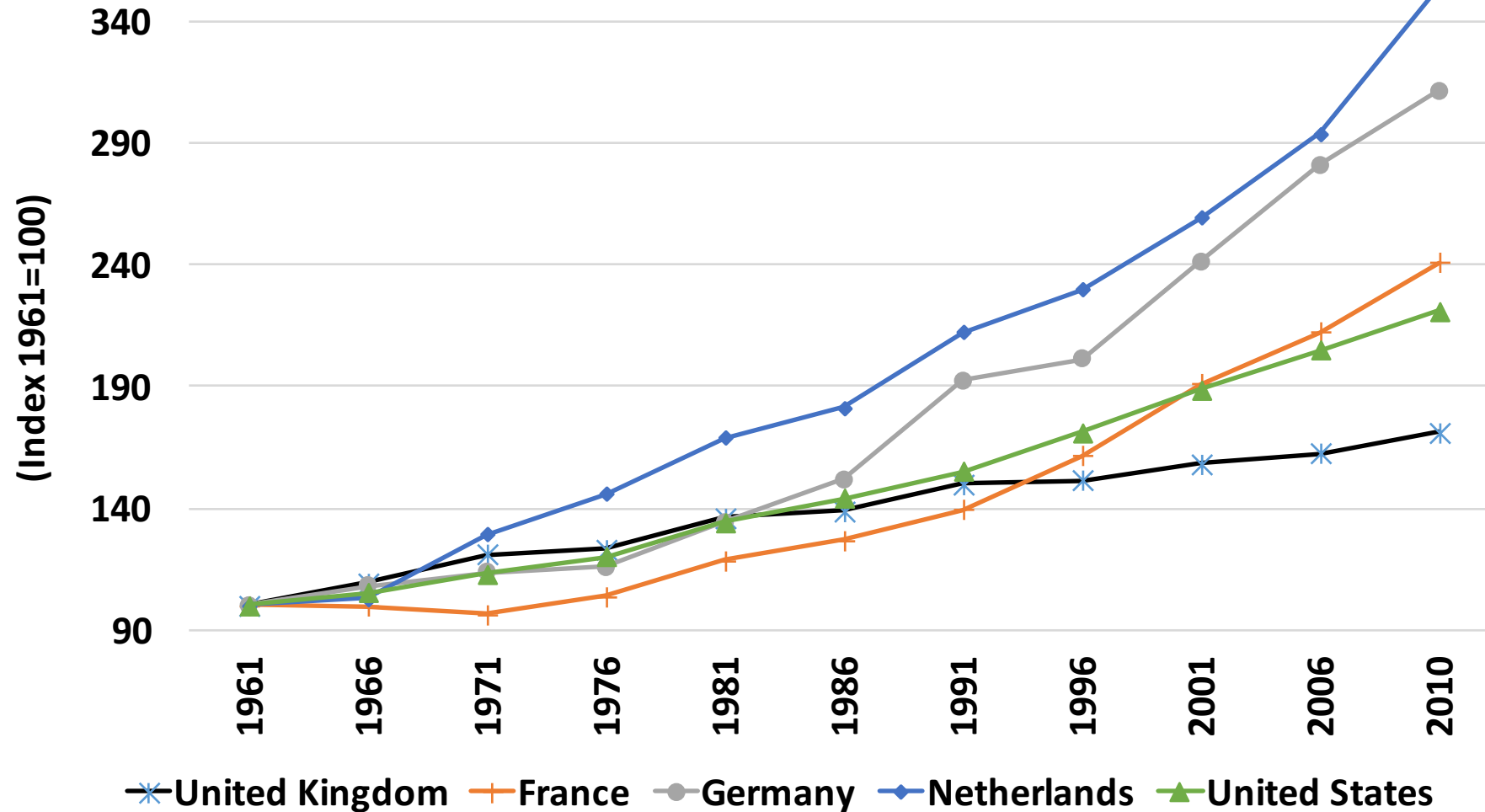
..... but we have to build reputation and trust at a defining moment for the industry

Long-term changes in consumer behaviour are impacting on our industry



Source: Defra Family Food Survey

Stagnation in productivity growth



AHDB's vision

A world-class food and farming industry inspired by, and competing with the best



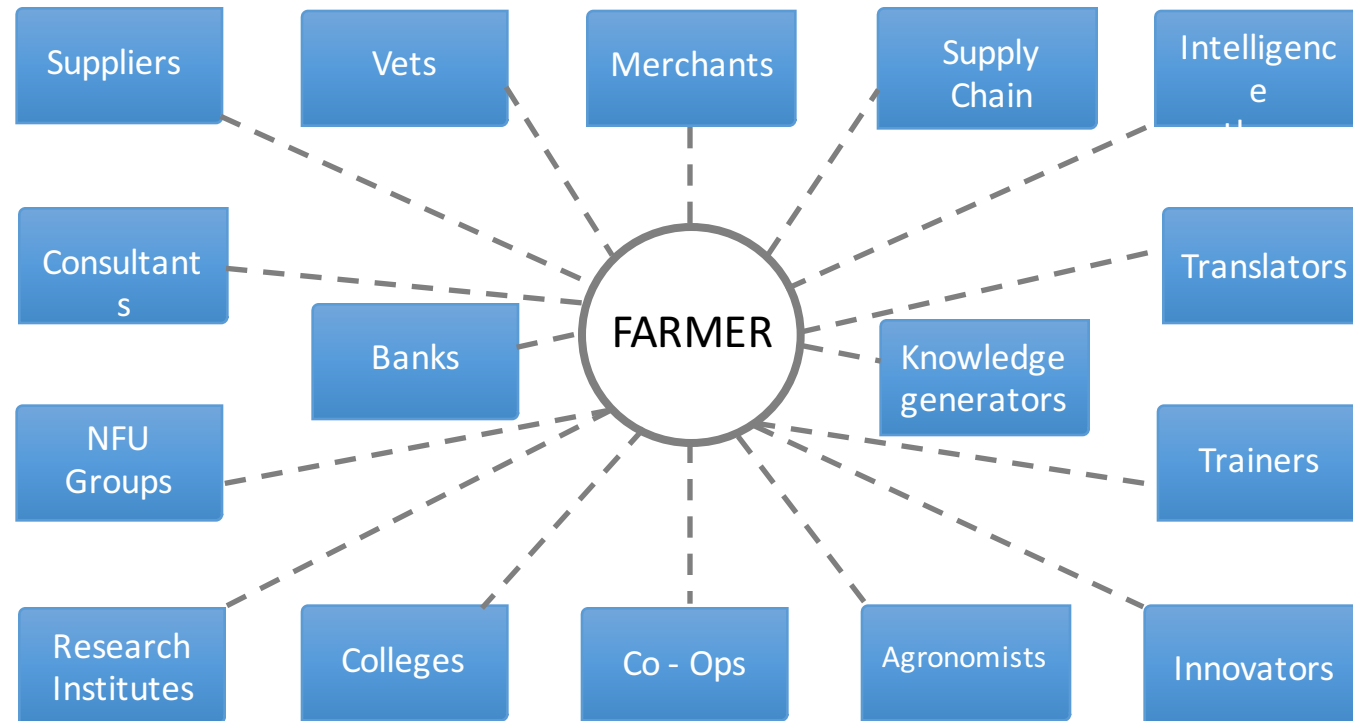
AHDB'S four strategic priorities

Working as one organisation we will:

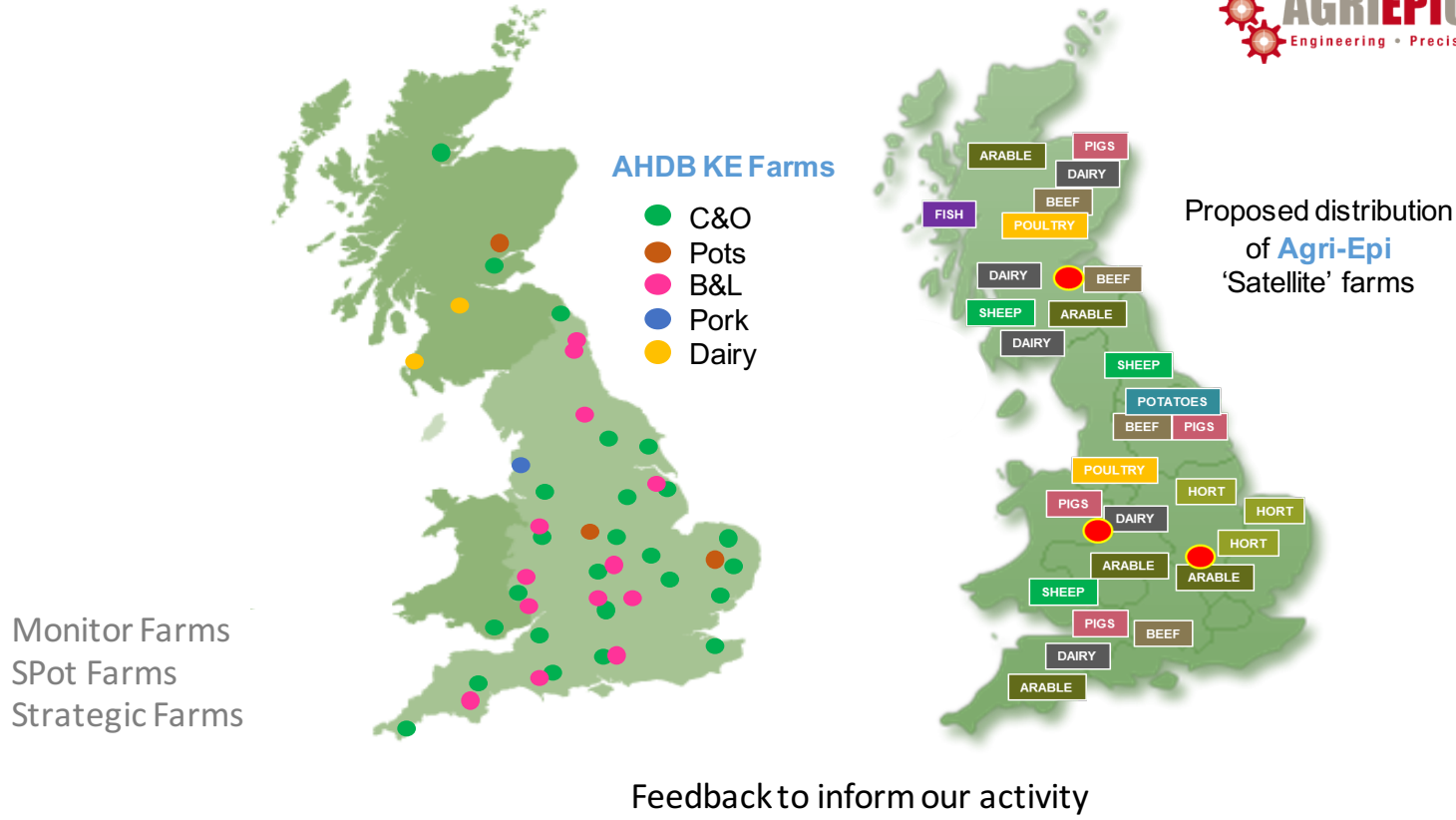
- Inspire British farming and growing to be more competitive and resilient
- Accelerate innovation and productivity growth through co-ordinated R&D and KE
- Help the industry understand and deliver what consumers will trust and buy
- Deliver thought leadership and horizon scanning



Leadership in a fragmented landscape



Farm Excellence Platform



Our ambitions in R&KE

- Close the gap between research & application on farm
- Greater coordination and investment in Knowledge Exchange
- Identifying and focussing on the gaps
- Work in partnership with farmers, growers & industry
- Build on excellence and best practice

Place the farmer and grower at the heart of everything we do

Big push in face to face and digital delivery



Inspiring Farm Excellence

Development of business leaders who inspire improvements for the whole industry



Accelerated uptake of technical tools linked to increased productivity

Increased numbers benchmarking and using it to drive business improvement



Targeted improvement in key areas of technical importance

Our Farmer Network

New This year!

- 13 Beef and Lamb Strategic farms
- 6 Monitor farms and 1 C&O Strategic farm
- 9 Scottish Monitor farms (joint with QMS)
- 1 Dairy Strategic farm
- 2 Strategic Horticulture centres
- 1 Pork Strategic farm
- 2 Strategic Potato (SPot) farms

Planned for next spring

- 6 new Monitor farms including Wales and Northern Ireland
- 5 new Dairy Strategic farms linked to Optimal Systems
- 2/3 new Pork Strategic farms



It all starts with knowing farm business costs



Whole farm approach. Easy to use.
Now live for Beef & Lamb, Cereals & Oilseeds
and Potatoes. Dairy to come later.

International comparisons available soon



Let's not sleepwalk into Brexit

- Change is coming
- Too risky not to prepare
- Helping farmers ask themselves key questions.
- Mobilising industry to provide the toolkit that's needed



The scenarios

Evolution

- Free Trade
- Agreement with EU
- Agriculture support, labour costs and regulation unchanged

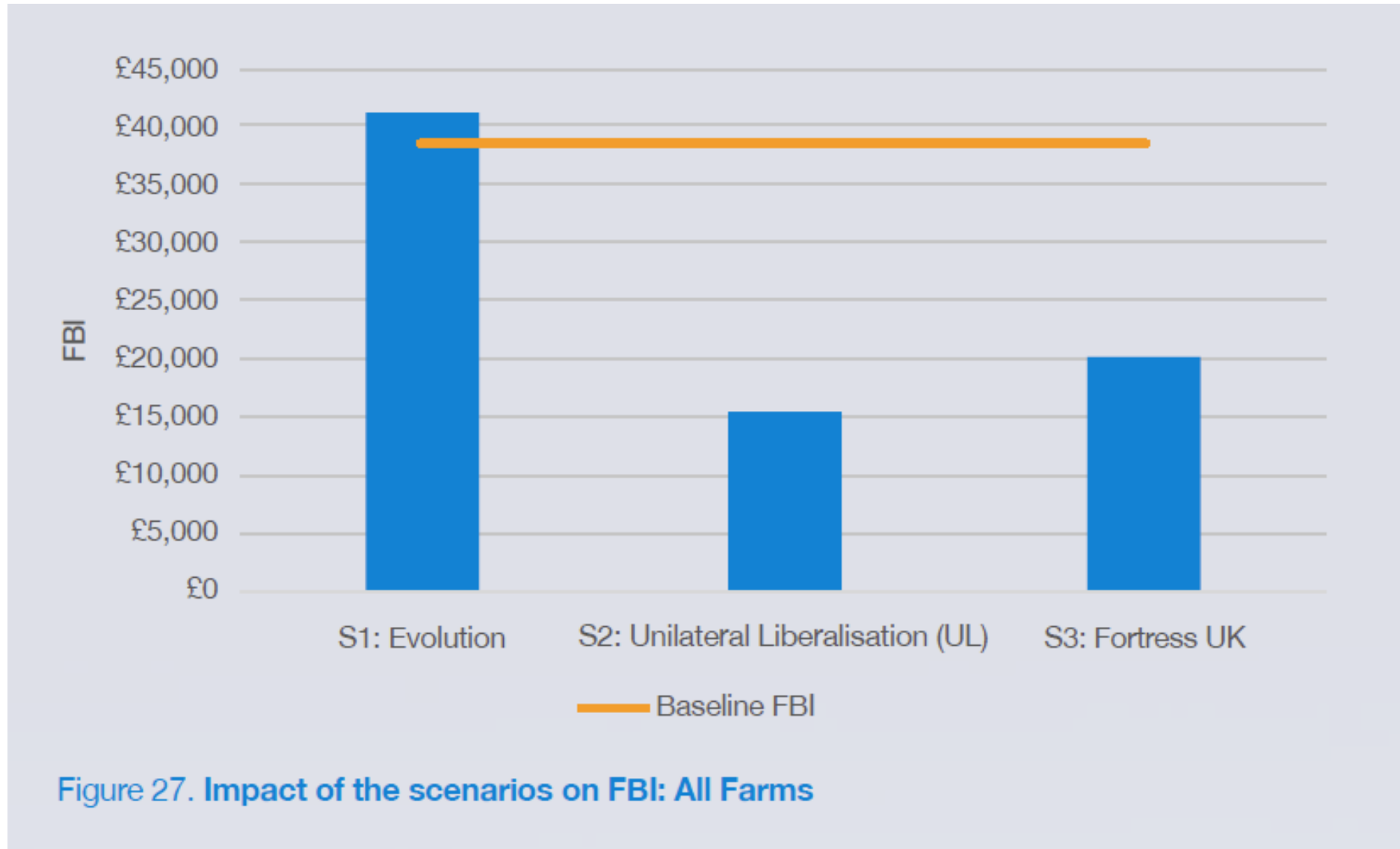
Unilateral liberalisation

- No EU trade deal, but UK lowers all tariffs to zero
- 50% cut in support
- Labour costs rise

Fortress Britain

- No EU deal
- WTO tariffs apply
- 75% cut in support
- Labour costs rise

Farm Business Income across all farm types



Market development and market access



Gear change required



1. Outlook filled with uncertainty. Focus on competitiveness
2. Productivity is key. Requires structural change & joined up R&D + KE
3. Domestic and global opportunities for UK products
4. Government has a role but won't provide all the answers – AHDB and industry need to align to identify solutions

Thank you for listening....

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