



United Oilseeds

THE LEADING BREAK CROP SPECIALIST

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The OSR Reboot Starts with United Oilseeds

July 2024

Dear valued members,

Today I ask you to take 10 minutes to read this important update, the content of which will form the backbone of a new initiative to give OSR in the UK a reboot. **United Oilseeds will be leading this initiative from the front**, leveraging our industry network, **for the benefit of all**.

As well as explaining the current situation and how we've arrived here, later on you can see how your farming cooperative and the wider industry is taking action and importantly how together we can make a real difference.

It's almost one year since I took the reins at United Oilseeds; a year in which I've had the fascinating opportunity to speak to many of you, our dedicated and supportive members, across the length and breadth of the UK, as well as many of our partners, including breeders, processors, retailers and industry bodies. During this time, a story has been playing out, and it's something that we as an independent farmer cooperative need to talk about.

Here are a few of the headlines that set the current scene for OSR in the UK:

"The UK has the worst-performing OSR yields compared to all 27 EU countries"

"The area of oilseed rape grown in the UK for harvest 2024 will be the smallest since 1984"

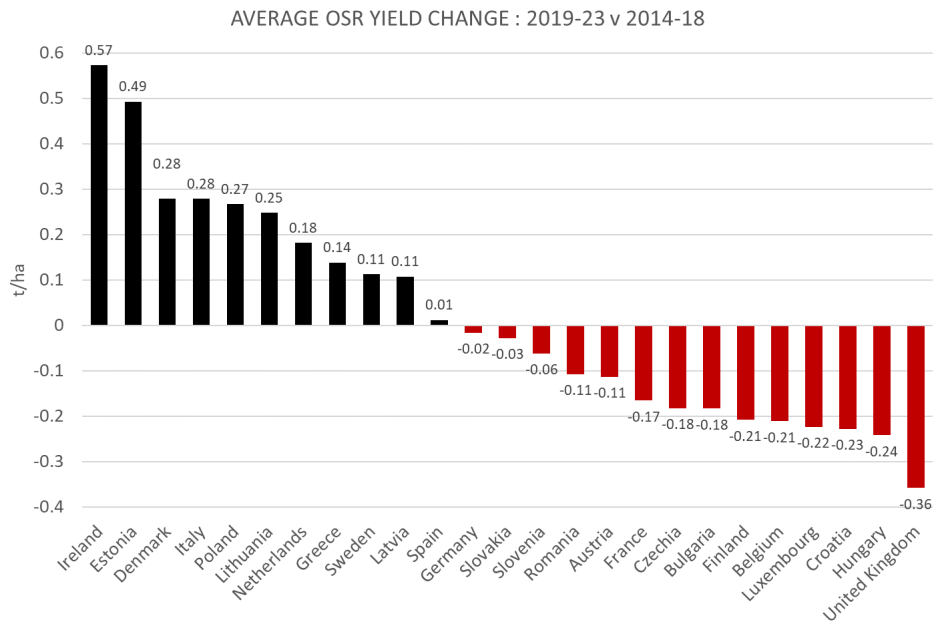
"UK food security on edible oils is down to just 20%"

"The UK will import more OSR than it produces for the first time ever!"

Starting with the statistics - of all EU27 (plus the UK) Member States, the UK has been the single worst performing country in terms of average yields. Average OSR yields in the UK have dropped 10%, or 0.36t/ha during the most recent 5-year period when compared to the previous 5-year average. That reflects a pre and post neonicotinoid (neonic) world.

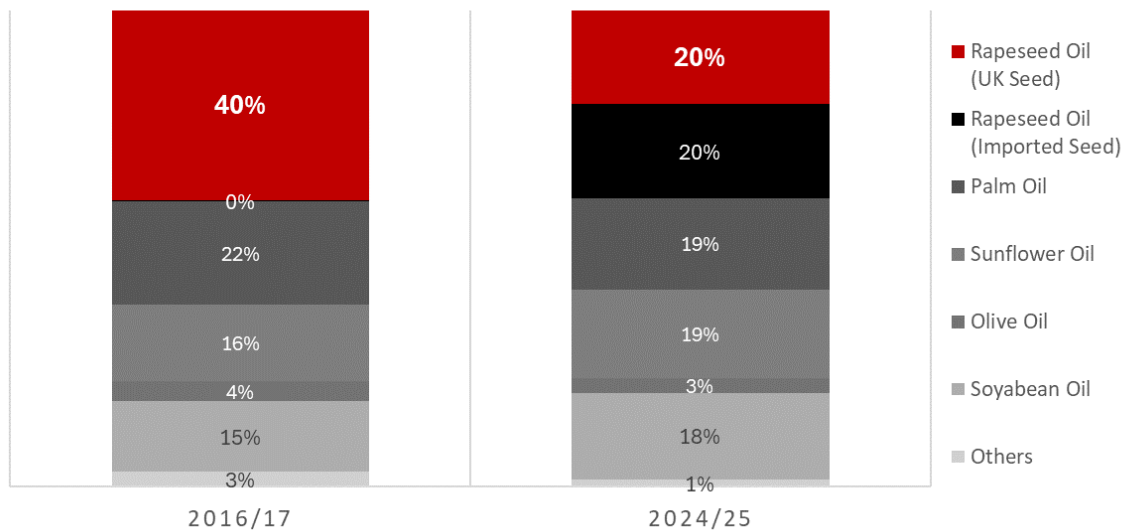


Hubbards
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If you look at food security – rapeseed oil is by far the most consumed edible oil in the UK, accounting for 40% of total oil demand. For context, it’s 13 times more important than olive oil. Of all of the major edible oils (rapeseed, sunflower, palm, olive, soy), OSR is the only one that is commercially viable to grow in the UK. We used to be self-sufficient in OSR, meaning we had 40% food security on edible oils (which is already quite low!). However, after the decline in UK OSR production we have seen in recent years, today we produce just 20% of domestic edible oil consumption, relying on imports for the rest. **This should be viewed as an emergency position from a food security point of view.**

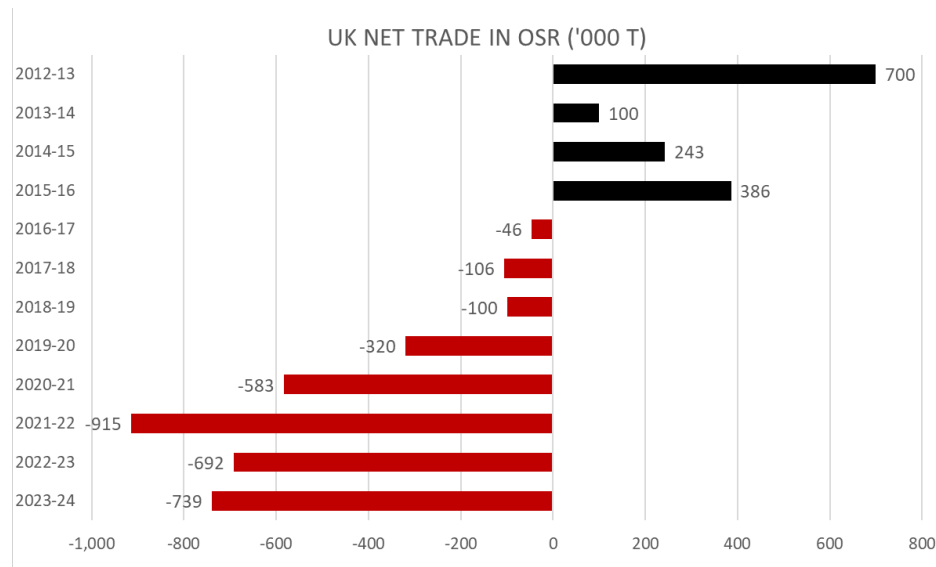
UK VEGETABLE OIL CONSUMPTION BY TYPE



Just wind the clock back to 2012, while the nation was in the grips of hosting the Olympic Games and celebrating the Diamond Jubilee of the late Queen Elizabeth II. You, our members, joined farmers across the country to harvest over 700,000 hectares of oilseed rape, a bumper crop that has been in decline ever since.

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At our peak in the 2010's, **the UK was the 5th biggest exporter of OSR in the world.** A decade on and we are now a large importer. The move from exporter to importer will **cost a massive £1 billion to the UK economy** this year; comparable to the amount pledged in the current Labour manifesto to provide 40,000 more NHS appointments every week; or approximately one-third of the total UK government spend on direct payments to farmers in 2023 (or akin to the predicted revenue generated by the current Taylor Swift UK tour!)



How times have changed. With the predicted area now down to 280,000 hectares, there's one thing that every one of our partners in the industry agrees on; OSR is a hugely important crop.

Why is Oilseed Rape so important to the UK?

To take a simplistic view, next time you are in the kitchen why not take a look at the ingredients of some of the everyday products we all use? For example, **mayonnaise, where a huge 78% of its composition is rapeseed oil.** Or next time you use spreadable butter on a piece of toast, check the ingredients, no doubt a significant percentage will be rapeseed oil (and the butter itself would have been from a dairy cow likely fed with rapeseed meal). It's an important ingredient in salad dressings, crisps, soup, cereal bars, spreads, and biscuits, to name but a few. Not to mention it's also the most widely used oil for cooking.

From a **farmer's perspective**, there are plenty of reasons to want OSR in the rotation. It offers a **true break from cereals in both pests and diseases and benefits subsequent first wheat yields.** It improves soil structure, enables an early start to harvest, helps control problem weeds, and offers the potential for early cash flow at the most expensive time of year. And from an animal feed perspective, it offers the UK farming industry a highly nutritious alternative to soy.

From an **environmental perspective**, the presence of a nutrient dense pollen and nectar source early in the season offers a kickstart to the year for **beneficial insects such as bees and hoverflies.** You may not be keen on OSR honey but for insects that depend on pollen and nectar to proliferate, not having OSR in a rotation results in a significant deficit in food sources just as colonies are either establishing, in the case of bumble bees, or increasing in size, in the case of honeybees.

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How did we get here?

As we all know, oilseed rape is very susceptible to crop damage & losses from Cabbage Stem Flea Beetle (CSFB), against which neonics, a group of pesticides, previously offered good protection. In 2013, the **three main neonicotinoids were banned** for all OSR uses both in the UK and the EU (at least in theory), and in all from crops (again in theory) from 2018 onwards.

To date, CSFB has most impacted the southern half of the country, but it has slowly been migrating north, with a sharp increase in issues being seen in the Yorkshire and Humber region this past year. To date, the Northeast and Scotland have been only marginally impacted, with pest population numbers low in those areas so far. But for how long?

As a result, the increased risk experienced by farmers growing the crop is two-fold. Firstly, **getting the crop established** in the autumn under heavy pest pressure is becoming more and more difficult and secondly, **yield losses** caused by poor establishment and larval load during crop maturation.

Alongside the practical risks posed by the neonic ban, it has also set the foundation for a **very unlevel playing field**, something I've regularly discussed with members over the past year, and which you are **rightly angry about**. It's a classic case of offshoring. The ban on neonics was implemented by the EU/UK with admirable intentions, but all we have achieved is a reduction in the crops we grow in the UK and that supply has been replaced by crops grown elsewhere. If we look at the imports into the UK over recent years, the largest origins are Australia, Ukraine, Uruguay, all of which have access to neonics. Perhaps even more frustratingly, imports have also grown from EU countries (Latvia, Lithuania, Estonia, Romania) which, despite the ban, have been able to use neonics in recent years (completely legally, I must add) due to emergency authorisations & derogations. We banned neonic usage here, but just now import from elsewhere. **We haven't reduced neonic usage, we have just off-shored it.**

So, let's take a look at potential solutions to get OSR back on its feet and growing again

As many of you will know, I spent several years living abroad, away from the UK market. Upon my return, I have been somewhat surprised by the lack of concerted effort, collaboration, and focus on improving outcomes for OSR across the UK industry. There have been some studies, research, etc. but I would describe efforts as somewhat patchy and piecemeal. Clearly, we can no longer drill and pray; **we have to change our approach** if we are to make the progress that we all desperately want to see.

Firstly, and most importantly, **Neonicotinoids are not coming back**, and saying anything else is counterproductive to any activity we might undertake with other stakeholders and certainly policy makers. We therefore need to move the conversation forward rather than dwelling on the past.

Having surveyed the **agchem companies**, it is also clear that there is not any chemistry that will replace the neonics. There is **no silver bullet**, but I believe that there are a **series of marginal gains** that will help get us into a more stable situation. United Oilseeds are going to re-double efforts in this area, investing time, as well as capital from our balance sheet, to move things forward.

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So, what are we doing?

OSR needs a reboot and United Oilseeds are looking to **lead the industry in finding a new path forward**. As part of this, we have been looking to leverage our **industry partners to put together a consortium/advocacy group** to help collaborate with each other with the sole purpose of helping the UK farmer have the ability to grow a stable, profitable OSR crop.

Our domestic demand for rapeseed, driven by the UK food consumer, equates to around 1.8 million tons, which would require **a stable area of around 400-500,000 hectares**. This should be the industry's goal.

We have engaged an independent 3rd party consultant, initially **funded by United Oilseeds**, to lead and chair this and to ensure that this remains focused on the simple goal above, rather than any commercial benefit or conflicts. The intention of this group will be multi-faceted, a cross functional group, working in areas such as **measuring & monitoring, agronomy, IPM, chemistry, genetics, policy & advocacy**.

Below are just some of the things that United Oilseeds are supporting and would like to highlight.

1. Today, **we are launching a campaign to ask growers to consider doing a post-harvest cultivation** on rapeseed fields. Huge credit has to go to Colin Peters and his team at NIAB for some really exciting work on this. Their [early-stage study](#) shows that a shallow but thorough cultivation immediately after rape harvest can reduce CSFB adult emergence from the soil by between 50-90%, by disrupting the lifecycle. **This will then benefit the following years rapeseed crop, maybe on your neighbouring field, or possibly even on your neighbours fields**. There is certainly an altruistic part to this - we are encouraging our farming community to come together, in part for the benefit of their neighbours. I have to stress, that this research is only in its infancy, and Colin to his credit is reluctant to overplay the results. Our take is that as the action itself - **a post-harvest cultivation - is relatively straightforward, then why not?** Let's not hang about, let's give it a go. Every little helps and time is of the essence. United Oilseeds are actively in discussion with NIAB to understand how we can move forward based on this initial research, including accessing additional grant funding for it.
2. Incidentally, a light cultivation may be a good way of creating a decent **seed bed for your Summer Sown Cover Crop (SOH3)** and claiming the associated SFI payment (For those in England), which seems only viable following on from OSR. More details are available on our flyers and website.
3. Some of the gains will also be through embracing new technologies. In recent weeks, we have begun a marketing partnership with Bayer for the **roll out of the MagicTrap**. This is a water trap with AI camera technology which can identify pest pressure (CSFB, Weevil, Pollen Beetle) and feedback real time information. We have already set up a network across the country with the intention of sharing that information with our membership so we can track pest pressure regionally. I would encourage our growers to join and add to that network to even better improve its effectiveness. **Monitoring pest pressure is going to be an important step forward** as it can help our growers be informed about the current situation and potentially adapt drilling dates accordingly.
4. **Drilling dates** have also been an important topic of discussion lately. Chris Guest and his team at seed breeder, NPZ (formerly LSPB), have done really interesting work on planting dates and yields. Hopefully, you will have seen the article in our most recent [Growing Break Crops publication](#) (Page 14), but simply my biggest takeaway from the research I've discussed with

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NPZ is that **flexibility around sowing date** is key. I think knowing the pest pressure situation and understanding that actually we have more flexibility in the drilling window could really help, with some of the best outcomes now coming from crops drilled well into and even past the middle of September. Chris suggests that '**Ditching the date**' and drilling at the right time based on the conditions, rather than by calendar date, is now the best strategy for growers to follow given the changing climate and the pest pressure.

5. Likewise, **Magic Trap will be useful to measure CSFB numbers**. Data will continue to become more and more important in the future, across all things in life, with actions like future (bio)pesticide approvals no exception. In order to get approvals for new chemistry expedited, measurable statistics will be important. Likewise, their use will likely be restricted unless there is a certain threshold of pressure and live data collection will be crucial to that.
6. Talking of chemistry – United Oilseeds are also just putting in place a funding program to support some further research into a really exciting early-stage study which can **significantly increase the effectiveness of some existing plant protection products**. This has the potential to boost sustainable production, whilst reducing potential environmental harm. Further news on that will come in due course.
7. One thing that is often less talked about is the impact of CSFB on final yields. We know establishment risk is a major problem, but the larval load and the drag that has on yields has also been a major contributor to the challenges our growers face. It's obvious, but yield is incredibly important, which is why **United Oilseeds will again this year be sponsoring the ADAS run, Yield Enhancement Network (YEN) for Oilseeds**.
8. Further down the line, there are of course other longer-term gains to be made. For instance, we have been in touch with the John Innes Centre who are working on some **exciting mRNAi research**, whilst the seed breeders are working tirelessly to develop **varieties with resistance and/or resilience** to CSFB and we continue to fully support those projects.
9. The consortium/advocacy group mentioned above will also be **important from a policy point of view**. A collaborative voice that will advocate the importance of OSR for British farmers, the UK economy and for our food and feed security. A combined effort to speed up processes where necessary and push for favourable changes in policy & legislation that will support our members; we believe that Government policy should switch to encouraging better oilseed food security, and we propose working with the new Government to make sure that happens.

By way of conclusion, I want you, our members and the wider industry to know that United Oilseeds will carry this fight forward. Plenty of people have asked me whether I am worried about the future for OSR in the UK. My answer is no, I'm not. Yes, there is plenty of work to do, and the current situation is not ideal, but with **United Oilseeds leading the way**, I'm completely confident that we can find the solutions needed to return to better self-sufficiency with our homegrown OSR crop. Grown successfully, it's great for farmers, great for the economy, and great for the environment, and demand for its products has never been stronger.

Thank you.



James Warner,
Managing Director, United Oilseeds

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