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MEMBERS' WEEKLY MARKETING COMMENTARY



Weekending 27 November 2026

With last weeks various 'agreements' or not, in Brussels I'm waiting to see what the fallout may look like. As I have said many time since Brexit, the movement of arable crops has been relatively painless. Cereals have always had a special place in the process, probably due to the years of restrictions and licences that were in place, while oilseeds have little or no restrictions mainly due to the need for imports such as soya, and over the last five or so years OSR / canola.

The date for enforcement of the SPS agreement is March 2028, but what does that mean for you as farmers, and us as the industry moving goods to destination? Currently the only advice I believe anyone can give is:

1) Think what percentage of the 2027 harvest you would expect to still have on farm in March 2028, what chemistry you used, and what toxin levels it has at harvest.

2) Think about what you plan to plant for harvest 2028, think about which inputs currently don't a line with EU policy, and follow which between now and then may be approved.

If we deal with both points separately it may become clear.

What tonnage do you not tend to move off farm until post March 2028? The rules are currently not 100% clear, but the EU may insist that any commodities on 'swich over day' will have to comply with EU legislation, this will include toxins at EU levels, i.e., Don for food consumption at max 1000ppb rather than the GB current level of 1250ppb. Then the new toxin for GB - T2 and HT-2 which for wheat for human consumption will be 50ppb, malting barley 200ppb, barley non malting but for food 150ppb, and Oats for Human consumption with husk at 1250ppb. i.e., clean crops, and the industry will have to learn to test for these new toxins – they may even appear on the passport!

At this point, I will also mention ergot, the legislative level will drop from 0.5g/kg to 0.2g/kg, remember the contractual levels for most grain in GB is nearly always zero, so this is a paperwork fact.

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Other than the above, toxins will remain as is unless something changes, and there lies the point… from now on anything that changes in the EU, we and you need to be on the ball.

So, any 2027 harvest wheat left until March 28 to market, to be 100% safe will have to meet the above terms for toxins. Similarly, any grain harvested in 2028 and onwards will have too as well.

The next part moves to chemical residues. I have mentioned before that there are a small number of chemicals that are approved in the UK, but not CURRENTLY in the EU. I feel it wouldn't be right for me to publish the list of products here because they are currently legal in the UK and could by March 28 be legal in the EU. One is an herbicide which I would like to guess would be approved in the EU as it's being used in a few EU countries and is awaiting approval, but there are a couple of fungicides that may cause some issues. What I'm politely saying is, please talk to your agronomist and keep close to any updates through the farming press. Similarly, if you buy chemistry maybe only buy what you need. I'm also convinced that an herbicide chemical is unlikely to show up on the grain if analysed, but a fungicide chemical may do…

The chemistry companies will be doing their best to sort out the current situation / imbalance as quickly as possible - ultimately, they can't afford to have a cliff edge situation, but as they always say 'buyer beware' and make sure you ask the questions every time you buy anything - is this approved for use in the EU? I'm sure we will be asked loads of questions by certain parts of the grain supply chain i.e., those that send product to the EU and may even be asked to supply grain that hasn't had certain chemistry but remember if it's not illegal in GB you can use it, especially if it's the difference between a crop that is commercially viable or not. Just know what you are doing and think how it may affect the way you market your crop, and more importantly keep records.

All of the above will create uncertainty because currently nobody knows if products will be approved in the EU or will just be removed from sale in GB, but on the latter the question will also be when, and I'm sure there won't be a chemical company that will walk away without a fight for compensation if they have to remove a product.

We also must be aware that the UK will have to take on the EU's approved GMO lists. This is probably an easier action as ultimately, the UK has always been on the drag with approvals, but again, does the UK government absorb the EU list before March 28 or not? Reality is, the UK didn't (from where I'm sitting) we never really duplicated the way decisions were made in the EU in many departments, but I do worry that we just become a follower again rather than a leader. One point will be how much being a follower will save us in cash, but then I assume the price of Eurostar tickets will rise as more civil servants start attending meetings in Brussels that they can't add any input into…

I'm also wondering where the SPS agreement leaves us with regards to CBAM and the EUDR. You all understand CBAM, but EUDR is also starting on the 30 Dec 2026 for those in the EU. The plan is to ensure certain goods are produced only form land that hasn't been a forest since Dec 2020. It's a great idea, and it will come into force in GB at some point but as of end December, Northern Ireland

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will have to follow EUDR rules for wood, cattle, cocoa, coffee, palm oil, rubber, and soya. The problem is that there is currently a lot of uncertainty and anger in the EU around the start of the EUDR. My inbox has been full of letters and similar, between Member States and the EU authorities. There are a few countries that just don't have staff / regulations in place to deal with the implementation, and now there are major concerns around the working or not of the 'systems' that are in place to record the information being asked for. Not only are there threats of financial fines, but added official controls in ports, and even sanctions against companies that have issues, and that's before you read the document about the contingency plans that are supposed to be followed if the 'systems' go down.

Honestly, it all seems very nasty and slightly concerning. The latest email discusses at what point you leave livestock to go hungry because the authorities have said no to discharging and using a ship full of soya because the computer says no., I do understand the need to improve the way we have done somethings in the past - yes, the world needs protecting from us as humans, but at what point do the patients rule the asylum? And at what point does a system rule us just because it was built and therefore must be used…

The world is currently far from a quiet peaceful place, and I do worry that we will face a food security issue at some point, aligning with the EU SPS agreement is not the worst thing in the world. It allows us, and them easier access to foodstuffs if something God forbid went majorly wrong, but we need to make sure we do hold on to our own ideas and freedom to do what we need to do when we need to. The world is full of companies and governments wanting more and more data on systems, but there must always be a contingency plan for issues. In a funny way, the paper grain passport has served the UK industry very well and probably always will! If anyone wants a digital version, all they need to do is ask the end receiver to add the intake specs and weight to it and scan a copy into a system that then redistributes it to those who need it! Cost - a scanner at every destination, a computer, and not extra IT work for anyone else in the supply chain! It's time to think simple and minimal, after all, nobody has any spare cash these days for 'vanity' projects.

Don't forget to engage with your agronomist, and keep close to any updates, March 2028 will come round sooner that anyone will think meanwhile, I have started adding SPS information in the same email file as the one labelled Brexit… think we may be about to go full circle.

Finally, please take time to walk you stored grain, loads of bugs and vermin with four legs and long tails looking for a warm home for winter. If in doubt, stick your bare hand in the grain and leave it for a few minutes, bugs love the warmth and get caught in your hairs! 😊

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