

Frontier impact report

harvest 2025



Frontier



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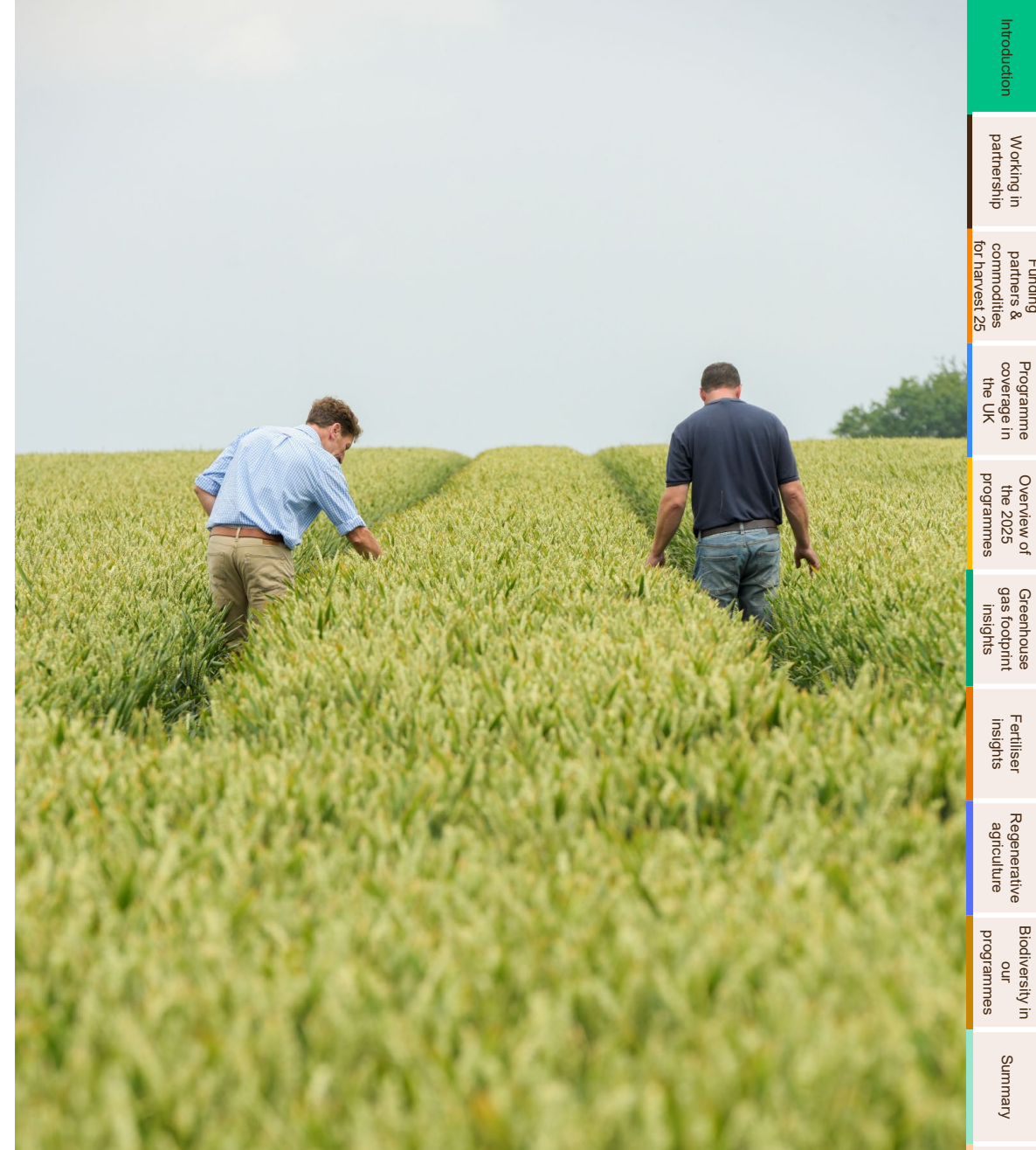
Welcome to Frontier's impact report

The UK agricultural sector is in a period of **profound transition**. Climate volatility, evolving regulation, rising input costs on farm and increasing demands from consumers are reshaping arable farming in the UK. For Frontier, sustainability is no longer a peripheral consideration; it is becoming central to long-term commercial resilience.

As both a supplier of crop inputs and a purchaser of grain, an agricultural merchant occupies a unique position of responsibility and opportunity in delivering sustainable agriculture. The resilience of future grain supply depends on the long-term productivity of UK arable farms and Frontier sees **supporting sustainable farming practices** as critical to strengthening the entire supply chain, from field to processor, brand, retailer and ultimately the consumer.

Across the UK, farmers are already experiencing the impacts of changing weather patterns; wetter winters, prolonged periods of dry weather, high-intensity rainfall events, temperature extremes and increasing seasonal unpredictability. This affects crop establishment, yields, soil health and grain quality. These pressures create significant commercial risks throughout the supply chain, including reduced grain availability, greater supply volatility and increased financial strain on farm businesses.

Strengthening resilience at farm level is essential to maintaining a stable, productive and sustainable grain supply.



Our approach

Frontier's sustainability programmes are designed to support growers in building resilient, productive and environmentally sustainable farming systems. The programmes focus on delivering practical solutions on farm while providing the flexibility needed to work across different farming businesses and local conditions.



To strengthen climate resilience, Frontier's approach is centred on three key areas: **climate mitigation**, **climate adaptation** and **on-farm biodiversity enhancement**. Together, these practices help future-proof arable farming, enabling the production of high-quality crops and resilient yields while reducing environmental impact.

Frontier is also committed to ensuring that the data presented within these reports is both accessible and meaningful. Information is translated into clear, robust metrics that support sustainability reporting requirements throughout the value chain. Verification processes provide confidence that incentivised actions have been implemented on farm and that reported outcomes are evidence-based.

This report outlines how Frontier's sustainability programmes are helping the company to deliver its commitment to advancing agriculture, highlighting the actions being taken on UK farms, the outcomes achieved to date, and the opportunities ahead to create long-term value for growers, customers and the wider agricultural supply chain.



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Frontier Agriculture

- Formed in 2005
- 50:50 owned by ABF and Cargill
- Independently operated
- £1.72 billion revenue
- 1,200+ employees

Our people are our greatest asset

Health and safety



- Number one priority
- 'Stop-Think-Be Safe'
- Look after/empower employees
- Respect people across all interactions we have

Expertise



- Partners to our customers
- Broad range of solution knowledge
- Learning and development investment

Wellbeing



- Employee Assistance Programme (EAP)
- Employee surveys
- Employee network groups
- Support local communities

Where we operate

We operate across Great Britain, close to major trunk roads, ports, crop-growing centres and manufacturing hubs to provide added-value services for our customers.

Topcliffe / Yorkshire

Home to an industry first in the UK – a hybrid grain dryer, following a £1.3 million investment.

Invergordon / Scotland

Our most northerly site, supporting farmer customers as far north as Wick.

Head office / Witham St Hughs, Lincoln

Home to c. 170 employees.

Wimblington

One of our first grain stores to install the Javelot temperature monitoring and automation system

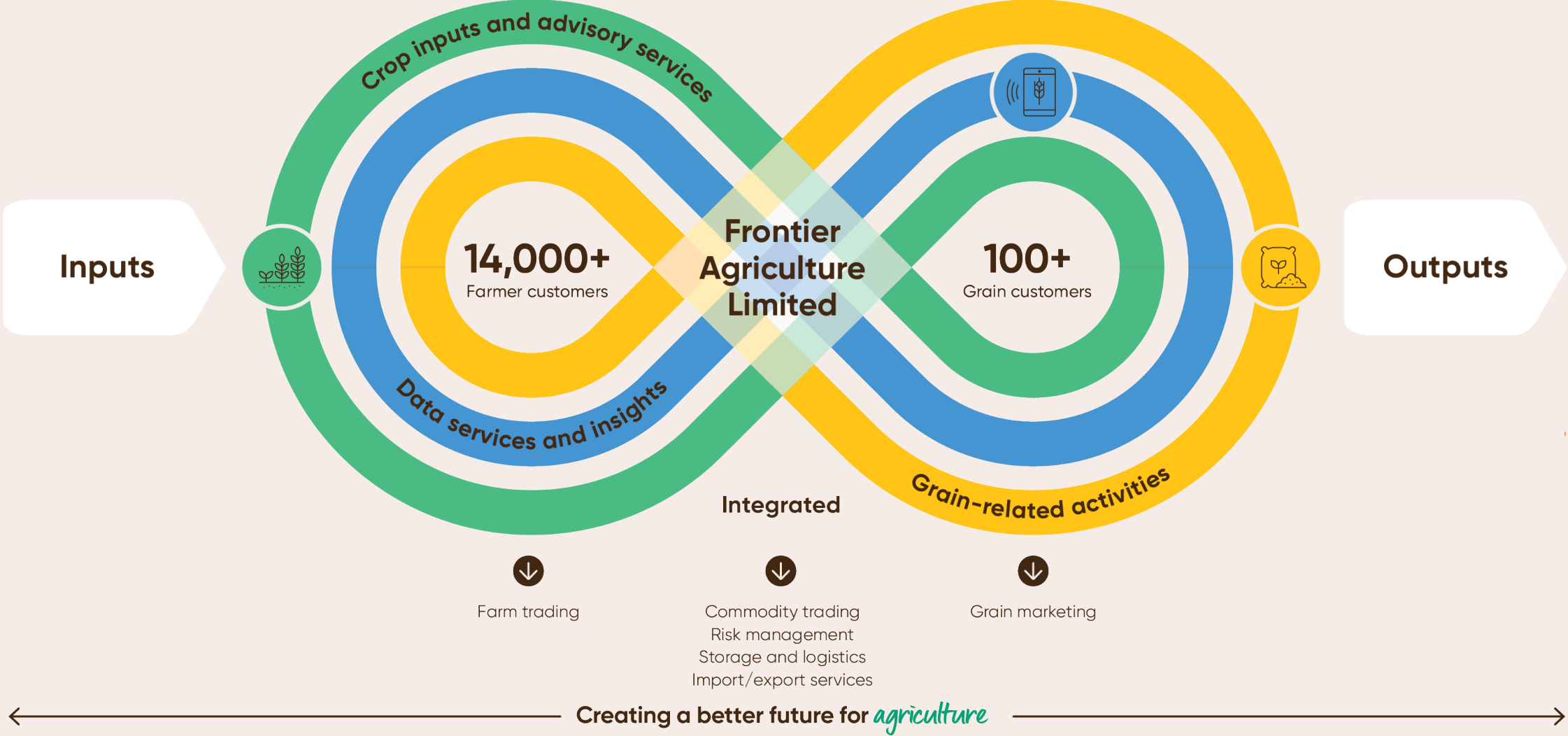
Eastern Docks / Southampton

Access to one of the UK's largest grain shipping terminals

- Head office (1)
- Main office (12)
- Grain storage and drying facilities (13)
- Seed plants (4)
- Crop protection facilities (21)
- Contracting services (3)
- Mobile seed treatment and cleaning (5)
- Shipping terminal (1)
- Processing (2)

8 replicated trial sites and 9 demonstration sites (not plotted)

Business model



Investing in continuous improvement and innovations

Our trials programme is the most expansive network of demonstration sites in UK agriculture.

Year-round, our researchers conduct replicated trials across **13,000** plots, spanning **30** hectares, actively seeking the best solutions for the challenges growers face.

We host **18** open days in June and July at trials sites across the UK, with over **2,100** attendees.



Frontier sustainability team

Frontier has a dedicated sustainability team comprising 12 experts with specialist knowledge in carbon accounting, sustainable and regenerative agriculture, and the design, implementation, evidencing and maintenance of sustainability programmes.



The team is further strengthened by access to Frontier's wider network of technical, agronomic, environmental and research specialists, enabling a multidisciplinary approach to developing and delivering sustainability solutions for customers.

This expertise is supported by an extensive research and demonstration infrastructure, including eight trial sites and nine demonstration sites covering 30 hectares. Together, these facilities host more than 13,000 replicated trial plots, providing a robust evidence base for sustainable agricultural practices and innovation.





Legacy

Since **harvest 2020**, Frontier has been supporting growers to recognise and reward sustainable practices that make a measurable difference to the carbon footprint of crop production. Over this period, we have experienced a range of challenging seasons, providing valuable insight into the impact of seasonal variability on farm performance.

To date, Frontier has generated carbon footprints for more than **one million tonnes of grain**, covering all major UK combinable crops. This experience and evidence base places **Frontier at the forefront** of supporting growers in the adoption, measurement and recognition of sustainable farming practices.

Working in partnership

Cool Farm Tool

The carbon calculation engine used to create the carbon footprints assessed across the supply chains in which we operate.

An industry-recognised tool providing robust, science-based and credible carbon footprint assessments.



YAGRO

Our data partner for producing the insights presented in these reports.

Responsible for cleaning, validating and processing data through the carbon calculation engine, ensuring accurate and consistent results at scale.



Downforce

Measures soil organic carbon stocks to provide an additional reference point for tracking changes resulting from programme activities.

Monitoring changes in soil organic carbon helps evidence carbon sequestration and supports one of the most scalable approaches to carbon removal in agriculture.



Funding partners and commodities for harvest 2025

This season, we’ve worked with ten industry partners across nine programmes covering:

OSR	Wheat	Barley
63,618t	250,631t	59,651t

Programme coverage in the UK

Number of farms in our sustainability programmes

807 farms



Overview of the 2025 programmes

Grain footprints measured

In 2025, we've measured the footprint of **373,900t** of grain.

This gives us deep insight into what really drives carbon emissions on farm.

Area covered

We measure more than the footprint/tonne of grain produced.

We also look at the footprint/hectare of crop produced, covering **223 square miles**.

Total number of farmers supported

Growers are key to the success of these programmes.

We've worked with **807 farms** supplying grains and oilseeds into nine different supply chains.

Financial rewards to farmers

Working with our industry partners, we have helped secure **£4,057,775** for growers, in recognition of the actions taken through these programmes.



Greenhouse gas footprint insights

In this next section, we look through the greenhouse gas (GHG) footprint of wheat crops in our harvest 2025 programmes. We will breakdown the sources of emissions from wheat production and identify the most significant contributors of GHGs when growing wheat in the UK.

Nitrogen fertiliser will be highlighted as the main source of emissions when growing wheat. Given that effective use of nitrogen is a key requirement for producing high-yielding wheat crops of sufficient quality, we will look at current and emerging options to reduce emissions from the use of nitrogen without comprising on crop yield or quality.

Context for harvest 2025

2025 growing season

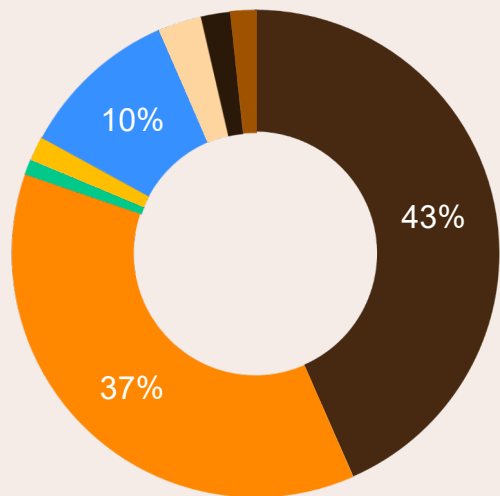
Weather conditions had a significant influence on the 2025 crop. While autumn and winter rainfall totals were close to the national average, high rainfall during September across much of England delayed autumn crop establishment and resulted in crops being drilled into wetter-than-normal soil conditions. The remainder of the season was generally drier than average, with a dry winter followed by the warmest spring on record and the driest spring for more than 50 years¹. Spring temperatures were 1.4°C above the long-term average. With three of the UK's warmest springs occurring within the last eight years, these conditions highlight the increasing variability of the UK's climate.

UK context 2025 - wheat

Average UK wheat yields in 2025 were 13% lower than the ten-year average². This was primarily due to drought conditions across the main arable cropping regions of the UK³. The combination of lower yields and drier harvest conditions will influence the harvest 2025 carbon footprint.

Wheat emissions

Average wheat footprint make-up



- | | |
|--|--|
| Nitrogen fertiliser manufacture | Operation fuel use |
| Nitrogen fertiliser N ₂ O emissions | Seed |
| Manure N ₂ O field emissions | Plant protection products |
| Crop residues | Non-nitrogen fertiliser |

The emission sources for wheat across our programmes are predominantly from:

- Nitrogen fertiliser manufacture (43%)
- Nitrous oxide (N₂O) emissions from the use of fertiliser in the field (37%)
- Operations fuel use (10%)

This is not surprising and is what we would expect to see from UK arable production. Spring 2025 was exceptionally dry, which affected both crop yields and the sources of on-farm emissions. Drier conditions typically result in lower nitrous oxide (N₂O) losses from fields. As a result, emissions associated with nitrogen manufacture make up a larger proportion of the overall footprint in this crop. We would expect this to change next season, with a more balanced contribution from nitrous oxide emissions and nitrogen manufacture.



Fertiliser insights

Nitrogen fertiliser is one of the largest sources of greenhouse gas emissions associated with arable crop production, but it also plays a vital role in global food production and is estimated to support around half of the world's food supply⁴. The emissions associated with nitrogen fertiliser can be broadly divided into two categories: fertiliser **manufacture** and fertiliser **use in the field**.

Fertiliser manufacture generates emissions through the energy-intensive production of ammonia, typically using natural gas as both a feedstock and energy source. As a result, the carbon footprint of fertiliser manufacture is receiving increasing attention. The Carbon Border Adjustment Mechanism (CBAM) will require importers to report, and ultimately pay for, the embedded emissions. This aims to drive investment in lower-carbon fertilisers, including those produced using blue and green ammonia technologies.



In the field, nitrogen fertilisers are converted into plant-available forms that crops can use. During this process, a small proportion of the applied nitrogen is released as nitrous oxide (N_2O). Typically, around 1% of applied nitrogen is lost in this way, although this varies with soil, weather and management practices.

While these losses are relatively small, N_2O is a highly potent greenhouse gas, with a global warming potential approximately 273 times greater than carbon dioxide (CO_2). As a result, N_2O emissions can make a significant contribution to the overall carbon footprint of crop production.

Lower carbon fertiliser options

One of the simplest ways to reduce emissions on farm is to switch to a lower-carbon fertiliser. While the product applied to the field may be the same, the emissions associated with its manufacture can vary significantly.

The key ingredient in nitrogen fertiliser is ammonia, which is traditionally produced using natural gas in an energy-intensive process. This conventional approach is often referred to as **grey ammonia**. New technologies are now emerging to reduce the carbon footprint of ammonia production.

Blue ammonia uses the same production process as grey ammonia but captures and stores much of the carbon dioxide (CO₂) generated during manufacture. The captured CO₂ is liquified and stored in geological formations, reducing manufacturing emissions by 30% to 50%. As it can be integrated into existing production facilities, blue ammonia is often considered an effective transition technology.

Green ammonia is a fossil-fuel free process of producing fertiliser instead using renewable electric to produce the fertiliser. This can reduce fertiliser manufacturing emissions by 90% or more. While green ammonia offers the greatest emissions reduction potential, production capacity is currently limited as the technology continues to scale.



221.4t of low carbon
fertiliser delivered in 2025

Driving nutrient efficiency



14,251ha of variable rate nitrogen directly supported by our programmes.

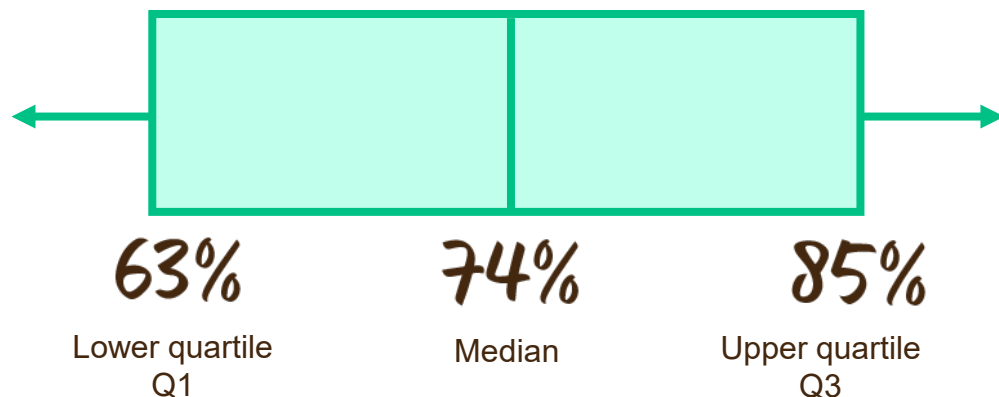
40% of growers in our baseline data collection reported using variable rate nitrogen.

One of the best ways to reduce the GHG footprint per tonne of crop produced is to use fertilisers efficiently. This is referred to as nitrogen use efficiency (NUE). By using the least amount of nitrogen to create the most amount of crop, there are less emissions per tonne of grain produced.

The starting point is a Nutrient Management Plan (NMP) on farm. This assesses crop nutrient requirements based on expected yield and quality, then accounts for nutrients already available from the soil, previous crops and organic manures. The remaining requirement is supplied through fertiliser applications. In the UK, nutrient planning supports both regulatory compliance and optimum economic performance.

Nitrogen applications can be targeted more precisely using satellite measurements of crop biomass. Areas with greater biomass receive less nitrogen, while areas with lower biomass receive more, helping to create a more uniform crop canopy. This approach can increase yields by 3 - 4% while ensuring nutrients are applied where they are most needed.

Nitrogen use efficiency across programmes



Wheat nitrogen use efficiency (NUE)

Nitrogen use efficiency (NUE) measures how effectively the nitrogen applied to a growing crop is converted into nitrogen removed in the harvested crop. It is calculated using both grain yield and grain protein content to estimate the amount of nitrogen removed from the field.

A practical target range is **75-90%**. Below **75%**, nitrogen is generally being used less efficiently, increasing both costs and emissions. Above 90%, crops may begin to rely on soil nitrogen reserves, potentially reducing soil fertility over time.

With a median NUE of **74%** and some growers achieving significantly higher efficiencies, 2025 saw reasonable performance but there remains considerable scope for improvement here overtime.

To support improvement, we provide growers with our Field Grain Analysis service, which helps quantify NUE at field level and identify opportunities to improve performance in future seasons.

Fertiliser improvements – inhibitors

Across the programmes, we have encouraged the use of fertiliser inhibitors to reduce nitrogen losses in the field. These losses occur during the natural processes required to make nitrogen available for crop uptake.

There are two main types of inhibitors: urease and nitrification.

Urease inhibitors

Used with urea-based fertilisers, urease inhibitors slow the conversion of urea to ammonium (NH_4^+). This reduces ammonia (NH_3) losses to the atmosphere, helping to retain more nitrogen for crop growth, improve nitrogen use efficiency (NUE), and reduce indirect greenhouse gas emissions.

Urease – 4,202ha

Nitrification inhibitors

Nitrification inhibitors can be used with a range of nitrogen fertilisers. They slow the activity of soil bacteria that convert ammonium into nitrate. By slowing this process, nitrous oxide (N_2O) emissions are reduced and more nitrogen remains available for crop uptake, improving NUE and lowering greenhouse gas emissions.

Nitrification – 2,245ha

Innovative fertilisers

A key lever for reducing emissions from crop production is selecting fertiliser products that deliver the lowest carbon footprint per kilogram of nitrogen available to the crop.

In 2025, Frontier evaluated two alternative fertiliser options, with additional products currently under development.

Nutrino Pro

Nutrino Pro is a foliar-applied fertiliser containing slow-release nitrogen. Due to its formulation and application method, lower rates of nitrogen can be applied compared with conventional fertiliser programmes. Typically, 7kg of nitrogen from Nutrino Pro can replace around 30kg of nitrogen from conventional sources, delivering significant emissions savings without compromising yield.

Nutrino Pro – 3,854ha



CCm Growth® fertiliser

CCm Growth® is a climate-positive organo-mineral fertiliser produced from low-value organic waste materials. During manufacture, carbon dioxide that would otherwise be released to the atmosphere is captured and stabilised within the fertiliser. The result is a slow-release nutrient source with a substantially lower carbon footprint than conventional fertilisers.

CCm Growth® – 66ha



Summary of fertilisers

As we've shown, nitrogen fertiliser plays a significant part in the carbon footprint of a crop, due to both the manufacturing of the fertiliser and its use in the field.

We have focused on **supporting growers to optimise this crucial crop input**. The aim is simple: to apply the right amount of nitrogen. The execution is more complicated: to produce the most crop with the least amount of carbon emissions, as well as reduce the amount lost to the landscape and its impact on biodiversity.

We are looking at the future role of technologies for fertiliser manufacture and fertiliser use in the field to reduce GHG impacts. Thanks to our relationships with fertiliser manufacturers, we have been able to trial emerging technologies and begin incorporating low carbon fertilisers and inhibitors into our sustainability programmes.

Both of these areas; optimising nitrogen use efficiency and incorporating technologies that lower carbon emissions, will remain key parts of our programmes in the future. Improvements will not only reduce the environmental footprint of nitrogen use but will also provide efficiencies to farmers.



Regenerative agriculture

Regenerative agriculture is not a one-size-fits-all approach. Different farms, soils and cropping systems require different solutions, which is why we focus on four key principles, outlined overleaf.

Many of the practices that support these principles are already being used by growers. Through our programmes, we aim to encourage wider adoption and help growers build on existing good practice.

While some benefits can be seen relatively quickly, others may take several years to develop. In some cases, adopting new practices can initially affect farm performance or increase operational challenges before longer-term benefits are realised.

We recognise that growers need practical and financial support to manage these short-term risks and transitions. By working together, we can help deliver lasting improvements in farm resilience, productivity and environmental performance.

Regenerative agriculture principles

In our sustainability programmes, we recognise and support practices that align with the core principles of regenerative agriculture.

These principles are:



Reducing soil disturbance

This refers to physical, chemical, and biological disturbances to the soil. Reducing the shocks caused by these disturbances helps improve soil function and boosts soil organic carbon levels. The most effective step is to move the soil less during tillage.



Keep the soil covered

Soil is fragile when exposed to rain, wind and direct sunlight. Keeping it covered with plant leaves, such as cover crops or with surface residues like chopped straw, helps protect the soil.



High diversity of crops, edge features and livestock on farms

Increasing the diversity of species on a farm is a key principle for improving system resilience. A greater variety of species enhances the ability of the system to cope with challenges, whether through disease management, financial stability, environmental support, or other benefits.



Keeping living roots in the soil year round

Roots are essential for maintaining healthy soil. They hold the soil together, provide food for soil biology, and take up nutrients for the plant. The longer living roots remain in the soil, the greater the benefits.



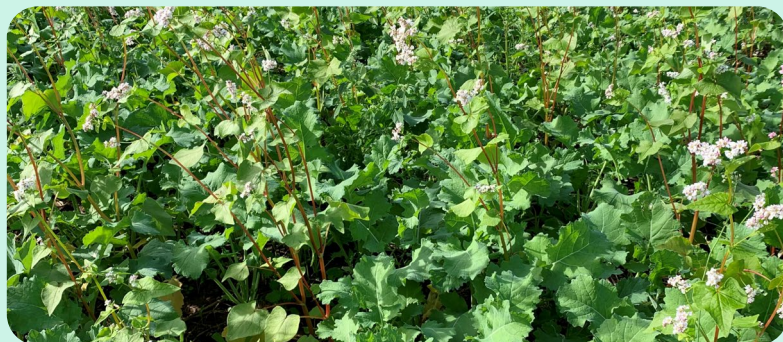
Sustainability practices we've incentivised

Cover crops

Cover crops are grown in the programmes to cover the **ground over winter between cash crops**.

Cover crops provide many benefits to the soil by protecting it over winter from heavy rainfall, maintaining soil structure, soaking up and capturing nutrients in the field and providing habitat and food for soil biology.

3,345ha



Catch crops

Catch crops are **grown in summer between harvest** and an **autumn established cash crop**.

Similar to cover crops, they make use of late summer sunlight, one of the most productive periods for crop growth in the UK. Their rapid growth allows them to produce large amounts of biomass in a short period, helping to capture residual nutrients, protect the soil surface and support soil health.

1,908ha



Sustainability practices we've incentivised

Organic manures

Organic manures supply a range of nutrients to the crops both when they are applied and throughout the rotation afterwards.

3.6% of the nitrogen required by the crops in 2025 was readily available from organic manures applied.

Applying bulky organic manures is also one of the best ways to improve soil organic carbon and soil health.



Legume companion crop

Legume companion crops are grown alongside the cash crops and fix nitrogen from the atmosphere, helping to meet the crop's nitrogen needs naturally.



They are terminated during the crop's lifecycle, releasing nitrogen for the cash crop to use.

This can reduce the need for mineral nitrogen fertiliser and lower the crop's carbon footprint.

3,995ha

Biodiversity in our programmes

Biodiversity is most simply the diversity of living things that are found in one area - the variety of animals, plants, fungi and micro-organisms like bacteria.

- These living things work together in ecosystems which help to maintain and support life.
- A more biodiverse farm is likely to support a more resilient farming system.



Agriculture is dependent on biodiversity and impacts it

- Pollinators are needed for flowering crops and beneficial insects are needed to hunt pests in crops.
- A soil's ecosystem is vital to support soil health, nutrient accessibility and crop production.
- Trees, scrub and hedgerows help to absorb rainfall.
- Aquatic plants, bacteria, snails, freshwater shrimps and fish help to keep water clean.
- Biodiversity offers a natural defence against the impacts of climate change on crop productions (climate adaptation) and an opportunity to help with the reduction/removal of GHG emissions (climate mitigation).

What does biodiversity need?

We asked farms in our programmes about the six key actions that will protect and enhance biodiversity:

1. Manage existing habitats
2. Manage boundary features
3. Maintain and manage wet features
4. Flower rich habitats
5. Seed-rich habitats
6. Sympathetic management of the farmed area

Managing **10%** of marginal or edge land for the environment will significantly enhance biodiversity. This can be further strengthened by farming the cropped areas sympathetically to the environment, to protect natural resources.

What does biodiversity need?

Our data shows that more than **68%** of farmers have over **4%** of their land in seed-and-flower-rich habitats, a key threshold for supporting farmland wildlife.

Farmers are already providing valuable habitat for wildlife. Continued support is needed to help them manage these areas effectively and maintain them in the long term.

Across our programmes, more than half of participating farmers manage over **7%** of their farmland specifically for environmental benefits.



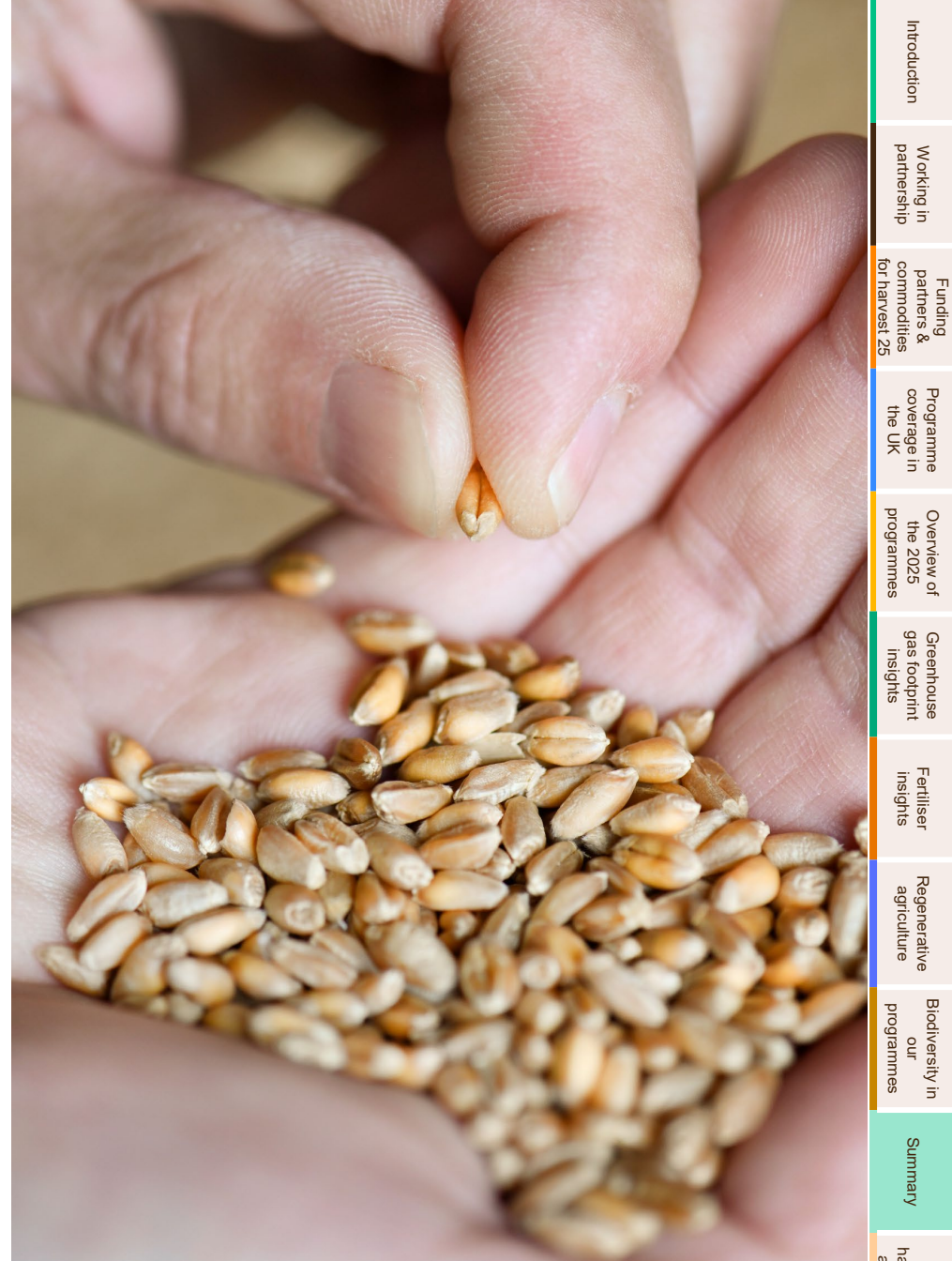
Summary

The UK grain supply chain is being reshaped by climate volatility, evolving sustainability requirements and growing pressure on agricultural productivity. For grain buyers, securing supply is no longer just about tonnage and quality, but also resilience, traceability, environmental performance and the long-term viability of farming systems. The **challenging 2025 season underlined** the need for more resilient farming systems.

As both a major supplier of crop inputs and purchaser of grain, Frontier is uniquely positioned to turn sustainability ambitions into **measurable on-farm impacts** through large-scale programme delivery. Frontier supports growers in adopting practices that improve soil health, optimise water management and enhance crop productivity in the face of increasing climate pressures.

Since harvest 2020, Frontier has generated carbon footprints for more than **one million tonnes** of UK combinable crops, creating one of the **largest datasets of its kind** in the UK. Analysis shows nitrogen fertiliser manufacture and field emissions account for around 80% of wheat's carbon footprint, making nutrient management the single greatest opportunity for emissions reduction. By combining evidence, scale and practical action, Frontier is helping to build the resilient farming systems needed to secure the future supply of sustainable UK grain.

Maintaining this momentum will be critical for both growers and the wider supply chain. The following page outlines how Frontier's sustainability programmes will continue to evolve next season, with a focus on driving further environmental improvements, strengthening farm resilience and delivering measurable outcomes at scale.



Looking ahead to harvest 2026 and further

Building on the success of existing sustainability programmes, Frontier's harvest 2026 portfolio will continue to deliver measurable environmental and commercial outcomes at scale, supporting growers while providing supply chains with resilient, traceable and lower carbon grain.

Harvest 2026 at a glance

- Eight food and drink supply chains
- 850 growers
- 64,000 hectares enrolled
- Approximately 425,000 tonnes of wheat, barley and oilseed rape
- More than £4.5 million in grower funding

Speak to us to find out more.

Expanding our offer for harvest 2027

As sustainability requirements continue to evolve, Frontier is developing the next generation of programmes to deliver even greater impact.

1. Targeted emissions reductions

A new programme offer focused on reducing carbon emissions through the adoption of the latest low-carbon fertiliser technologies.

Designed to be simple, targeted and effective, the programme will help growers make meaningful reductions in the largest contributor to crop carbon footprints.

2. Whole-farm impact

Building on the success of single-crop programmes, Frontier will be implementing a whole-farm approach to work alongside these offerings.

By supporting change across multiple crops and farming practices at the same time, this deeper level of engagement has the potential to deliver greater environmental and productivity outcomes.

Shaping the future together

Frontier remains committed to developing practical, scalable solutions that help growers, processors and food businesses meet their sustainability ambitions while strengthening the resilience of UK agriculture.

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