



Summary Notes from the first meeting of the Market Development Working Group

Wednesday 30th January, 12.00 – 15.00, CMS Cameron McKenna, Edinburgh

1. Welcome and introductions

2. MDWG Terms of Reference

- a. The draft Terms of Reference (ToR) circulated to the Group by REAL was discussed.
- b. The discussion included consideration of MDWG representation, identification of key stakeholders, nominations for future representatives or observers on the committee, and aspirations for how many contact days per year the MDWG should serve.
- c. It was agreed that the post of Chair/Vice Chair could be advertised or as an independent post. We need to be able to remove the Chair and elect a new Chair.
- d. The name of the Group was re-considered as it had been previously suggested to name it 'Market Confidence Working Group' but it was agreed that use of the word 'confidence' can imply there is a problem to resolve. 'Market Development Working Group' is most fitting.
- e. An update on REA's new working group for digestate was presented. Their work covers 'waste' and 'non-waste' digestate. The Group does not want to duplicate the work that REAL is doing. Updates will be provided to the MDWG on relevant developments of the DWG.
- f. REAL and the REA will aim to produce an organogram to show the relationships between different organisations and committees in this field, which will help to avoid confusion in the industry but could also be useful to identify work that would fall to each group.

3. Specific issues

Key issues for Research Hub

- a. A discussion took place on how the MDWG could put ideas forward to the Research Hub. Concerns were raised over the prioritisation of projects; if scheme participants do not vote on proposals from the MDWG then the time spent doing the work could be wasted.
- b. Although, the MDWG could build the technical knowledge to develop/build new markets.
- c. The link between the Hub and MDWG will be added to the Research Panel meeting agenda.
- d. This link will also be added to the MDWG ToR – the MDWG will come up with project proposals to be considered for the Hub as an output from each meeting.

Impacts from influx of food waste

- a. The Environment Agency's update at the last Technical Advisory Committee meeting was presented at the MDWG meeting; the UK is likely to produce 10 million tonnes of food waste, most of which will be anaerobically digested. This sudden increase will cause a risk to the land bank and potentially undermine confidence in digestate.
- b. Although, it was noted that the mandatory food waste collections may not come into force as the Resources and Waste Strategy is subject to consultation.
- c. The implications of this for the MDWG were discussed. In summary, there are two issues: impact on digestate quality and sheer volumes impacting on land bank availability. It was suggested that we look at what happened in Scotland when they mandated food waste collections for businesses and it was stressed that we should prepare now.
- d. It was agreed that work to tackle the concerns over the spreading of product digestate did not fall under the scope/remit of the MDWG but instead under that of other groups. It was reported that the Agency is planning to withdraw its briefing note on manure/crop-fed plants, but the industry would argue that manure/crop-fed digestate is not waste.
- e. It was also reported that the Agency is pushing for PAS 110 and quality assurance; therefore, there will be new markets and new products with crop-fed plants joining the scheme. NNFCC's biogas/AD database will be looked at to explore variation in plants and feedstocks.
- f. REAL published its scheme rules for the BCS and CCS to introduce option for operators to join the schemes for quality assurance purposes only (without the need to attain end-of-waste status). REAL will circulate a note from the MDWG on the new categories of certification and send to various environmental publications to reach the markets.
- g. The Agency is concerned over the lack of controls with spreading PAS 110 digestate but the Farming Water Regulations is a statutory instrument – digestate must be applied for crop need. This is a legal requirement and ensures spreading of digestate for agronomic benefit.
- h. REAL will reach out to the NFU as they are working on guiding farmers about the quality of materials and what to accept. We will introduce the MDWG and our aims.

Feedstock quality

- a. An overview of the work that has been carried out or is being carried out to improve feedstock quality was presented, including work carried out by the Food Waste Recycling Action Plan (FWRAP), Quality Action Plan (QAP), and the Renewable Energy Association.
- b. The REA has produced a library of information – a central resource on best practice and templates for input specs and info on the schemes. These have been linked together in one document for the QAP and FWRAP, which may be shared with the MDWG.
- c. MDWG members discussed the potential to produce a similar library of research documents related to market development to identify what we already have e.g. WRAP reports/market specs. The Research Hub could fund this work to develop a library of existing research and undertake a gap analysis to identify areas for future market development research.

Soil Association and Organic Certification

- a. An overview of the issue related to certified compost and the Soil Association (SA) was presented. The SA removed PAS 100 compost from their certification scheme but will continue to allow its use on organic land in some cases.
- b. An overview of the issue related to certified digestate and organic certification was presented. AD operators cannot supply digestate to organic farmers. There are several complications with the certification scheme and Defra's regulatory requirements.
- c. To reopen/open these markets for certified compost and digestate, the MDWG will aim to set up a meeting with Defra to discuss the organic regulatory requirements. It is not clear what will happen with Brexit but we need more clarity on the European standard.
- d. We discussed whether the Research Hub could provide us with marketing information for Defra. The Hub could provide the resource and briefing note to inform our discussions with Defra. This will be discussed at the Research Panel meeting.
- e. We should come equipped with information using e.g. WRAP's risk assessment and Zero Waste Scotland. This should be a series of meetings. We first need to know from Defra what the regulatory requirements are then we can approach each organic certification body. We could share the individual certification bodies' rules with scheme participants.
- f. We discussed who in Defra we should approach. Members of the MDWG will contact various individuals to seek this information. We will firstly find out what the organic requirements are as there are different interpretations; the certification bodies might have their own rules additionally, or they might interpret the requirements differently.

Inclusion of compost and fibre in topsoil manufacture

- a. The markets for manufactured topsoil are threatened because manufactured topsoil can no longer be supplied to the amateur horticulture market e.g. to garden centres. These are the rules in the Agency's Regulatory Position Statement (RPS) RPS 190. This includes manufactured topsoil comprised of PAS 100 certified compost and various soils.
- b. MDWG members will set up a meeting with the Agency directly to discuss this.

4. AOB

- a. It was announced that the Quality Protocols will be reviewed, and this will be discussed at the next meeting of the MDWG. This will also be discussed at the operator Forum meetings.
- b. The MDWG may invite operators to the next meeting with ideas for new markets.
- c. REAL informed everyone that there will be a survey issued to all operators soon to discuss with industry whether there is a need for a revision to PAS 110.
- d. ZWS will be carrying out market development work so will feed back to this group.

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