



Regulatory Re-Imagined : Navigating the Dynamic Plant Protection Products Landscape Post-EU Exit

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Key Messaging

CHANGE & UNCERTAINTY

Period of change and uncertainty in GB regulation.

OPPORTUNITY

Opportunity to do things differently.

TOOLBOX PRESSURE

Toolbox (being depleted) faster than delivery of new conventional Chemistry.

NEXT 2 YEARS

Presentation will bring in elements of change and impact over the next 2 years.

New Great Britain (GB/NI) Pesticides Regime



**31st January 2020:
BREXIT**

Start of the Transition Period

The UK is no longer involved in EU wide active substance, product and MRLs evaluations BUT, new decisions taken under the EU regime apply in UK.

1st January 2021:

An independent pesticides regulatory regime is in operation in GB (England, Scotland and Wales) responsible for →:

Active substance
& plant protection
product (PPP)

*Reg (EC) N.
1107/2009*

REACH
*Reg (EC) N.
1907/2006*

Maximum Residue
Level (MRL)

*Reg (EC) N.
396/2005*

Classification, Labelling
and Packaging

Reg (EC) N. 1272/2008

Reputational excellence of CRD added balance to EU Committee discussions and decision making.

Positives

Open communication applicants

- Pre-submission discussions
- Training offerings (CRD Industry)

Positioning Global influence and consideration of **evaluations from other jurisdictions**

- Drones and Codex

Regular dialogue with trade association CropLife UK

- Updates and solutions of the emerging regime



GB DIVERGENCE FROM THE EU

SINCE EU EXIT - 1st JANUARY 2021



Common Understanding


Cabinet Office

Policy paper

**UK-EU Summit
Common Understanding
(HTML)**

Updated 19 May 2025

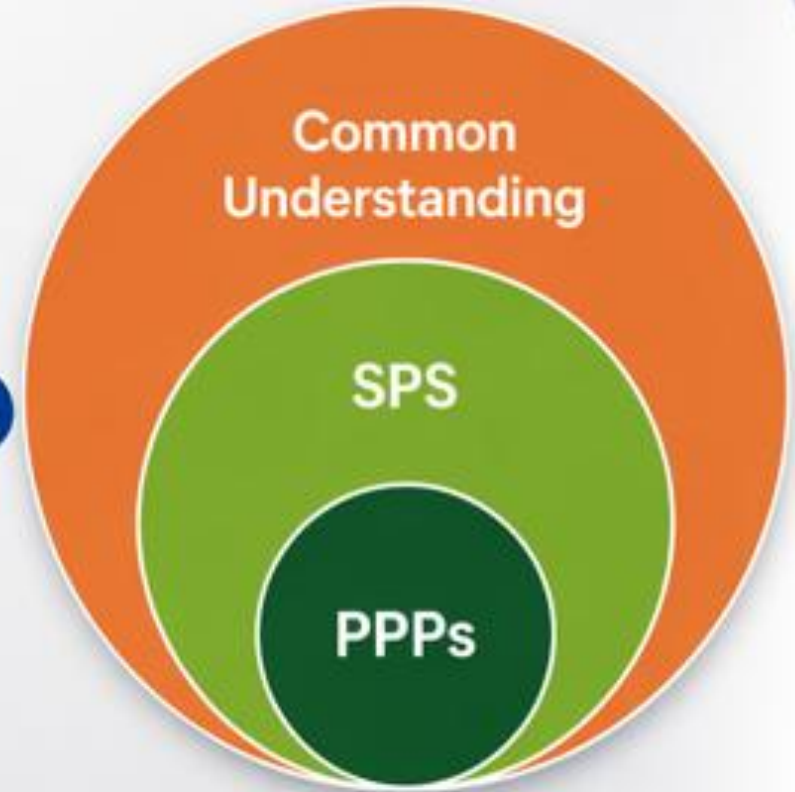
 Sets out the political commitments and shared priorities agreed at the UK-EU Summit.




EUROPEAN
COMMISSION

Council Decision
COM(2025) 408 final
Brussels, 16.7.2025

 Authorises the opening of negotiations on the Common Understanding between the EU and the UK.



● **PPPs** sit at the core of SPS within the broader agreement.

Scope

Regulations & GMO's and NGT's

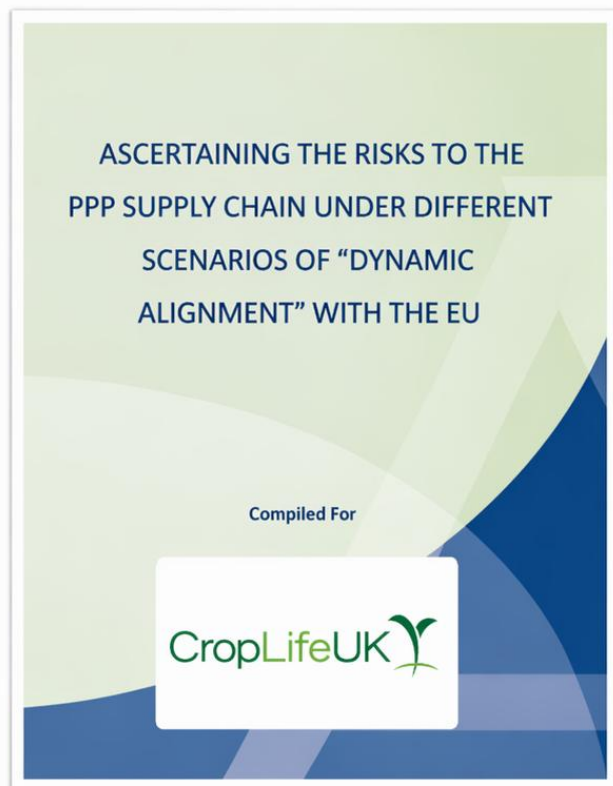
- EU legislation in scope of negotiations, and the GB equivalent legislation is likely to change as a result:
- ✓ Regulation 1107/2009 – Authorisation of plant protection products
- ✓ Regulation 396/2005 – Maximum pesticide residue levels
- ✓ Regulation (EU) 2017/625 - Official controls across food, feed, plant and animal law
- ✓ Regulation 528/2012 – Making available on the market and use of biocidal products
 - Included March 2026!

X REACH or CLP

Implications



Impact Assessment



3 potential scenarios

1

Gradual dynamic alignment

2

Time-limited dynamic alignment

3

Immediate and retrospective alignment

Government pushing for option 3!

Often referred to as the '*cliff edge*'.

No impact assessment by DEFRA (policy makers).

Focus on economic impacts for PPPs !

Results

Note:

Regulator (CRD) will have no voice in SCOPAFFs

involved in decision shaping **but not decision making.**

RESULTS

- First-year loss of UK farming GVA under Cliff-Edge Retrospective Alignment is estimated to be 3-6%
- Total Income from Farming (i.e. industry profit) is calculated to fall by between £500m and £810m (7-11% of the current 3-year average)
- A shift from winter combinable crops to spring cropping
 - more grass and fallow overall
- **Decrease in overall food production** - wheat volumes could fall by 9-16%, potatoes by 4-6% and apples by 3-7%
- **Medium term loss of GVA in the food and drink manufacturing sector ≈2%**
- **Delay Scenario just pushes losses back two years** – but more time to adjust
 - losses may be partially lower if GB/EU decisions converge – EU approves Actives
- **Managed Alignment sees the majority of losses offset** (in the short-term)

Risks vs. Benefits on Alignment



Improved market access to the EU and Northern Ireland from Great Britain, opening up new markets.

Lower business costs, with no requirement for SPS checks or export health certificates (saving approx. £200 per consignment).

Reduced complexity for exporters and importers through harmonisation of standards (MRLs, contaminants, and marketing standards).

Access to plant protection products (PPPs) approved for use in the EU, which are not currently approved in Great Britain.



Dynamic alignment with the EU active substance list.

Loss of influence on key decisions (SCoPAFF).

Transition periods, especially where there is (EU and NI) and GB divergence

Limited scope for exemptions.

What is the Industry Advocating for ?

GREAT
BRITAIN



EUROPEAN
UNION

- **Managed transition to alignment with EU PPP list so that the supply chain has sufficient time to supply and use stocks of withdrawn PPPs.**

*Allows time for cost-effective alternative approaches to be available and trialled on farm.
Avoids PPP disposal costs and unnecessary PPP use.*

- **Managed transition to EU MRLs so that GB MRLs continue to be valid until treated produce moves through the processing / food chain.**

Avoids disposal costs of treated produce which could be in breach of an MRL and resulting trade friction.

- **UK to be included in decision making – attendance at and vote in SCoPAFF meetings**

GB conditions of use are considered at PPP approvals and renewals.

- Managed alignment could have minimal impact vs Immediate retrospective alignment is not a one size fits all

Collaborations

- ✓ AIC
- ✓ NFU
- ✓ CropLife UK

All - Engaging with DEFRA

Is it meaningful?

Government just want to get the deal done!

New Active Substances (GB)

CINMETHYLIN

Luxinum® Plus

BASF
We create chemistry



Luxinum is a trademark of BASF
ISOFLUCYPRAM

VIMOY®



Vimoy is a trademark of Bayer

PYDIFLUMETOFEN

 **Miravis® Plus**
ADEPIDYN™ technology

syngenta

Miravis Plus is a trademark of Syngenta

In Contrast to EU –

CRD deliver approvals of
active substance, MRL's and
representative formulation all
within a month!

GB
V
EU

Approved in GB
but not EU...



Herbicides



Approved
in GB



Not approved
in EU

Cinmethylin**
Flufenacet
Metribuzin
Triflusulfuron-methyl
S-metolachlor



Fungicides



Approved
in GB



Not approved
in EU

Benthiavalicarb
Dimethomorph
Dimoxystrobin
Isoflucypram**
Pydiflumetofen**
Mepanipyrin
Penthiopyrad
Prochloraz
Isopyrazam
Ipconazole



Insecticides



Approved
in GB



Not approved
in EU

Clofentezine
Spirotetramat

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New ai's

'In Flight' Evaluations with CRD



Flumetylsulforim/ADF-16 (Adama)

Corteva – G1C-1-185 In flight!

GB Mirroring – EU-UK Reset (Alignment with EU regulation)

Background

- New EU partnership on trade and movement of plants, PPP, animals, animal products, feed and food
 - Negotiations started in 2025, expected to conclude later in 2026 with in force targeted from mid-2027

Today

- A new administration is now in place led by Prime Minister Burnham July26
- Previous chief negotiator with EU replaced by Hamish Falconer
- EU summit due to take place in July is now likley to happen in October/November.

The implementation date of July 2027 for EU reset is looking highly ambitious!

GB Mirroring – EU-UK Reset (Alignment with EU regulation)

Next steps

- Meeting in July to discuss operational considerations with the regulators was cancelled by CRD in July.
- Trade association (CropLife UK) proactively push to CRD the key consideration from industry as collated by the Policy and Regulatory group.
- This includes but is not limited to:
 - Aligning with EU decisions,
 - MRL's,
 - Article 21,
 - New actives approved in GB but not EU, inflight evaluations e.g (G1C-1-185 and Flumetylsulforim),
 - Guidance adoption as well as the need for meaningful transition periods.
- CropLife UK openly advocating for trilateral discussions between Industry (Crop Life UK), the regulator (CRD) and the policy maker (DEFRA).

Dynamic time with political agenda

Active Substance EU approvals, how does this work?



Dossier publication several months/years after submission
→ Representative formulation and GAP

dDAR published for commenting
→ Initial understanding of potential issues

Minutes published a few weeks/months after
→ Highlight key issues

Conclusions published
→ Clear understanding on registrability and data gaps for PPP

Several discussions in Scopaff – Agenda and minutes published
→ Understanding on potential complexity

A few months between vote and application

New AS – Where are they in the EU? – Sept 2026



Flumetylsulforim/ADF-16 (Adama) – Submitted in 2023
Ipflufenquin (UPL) – Submitted in 2019

Inpyrfluxam (Sumitomo) commenting started 9-Feb 2026
Fluoxapiprolin (Bayer) – commenting started 15-Dec 2025

Isoflucypram (Bayer) –new data requested submitted in 2025

Metyltepraprole (Sumitomo / BASF)
✓ EFSA conclusions discussed in Scopaff

Pydiflumetofen (Syngenta)
✓ Draft regulation discussed in Scopaff

Regulatory Focus – New molecules – Sept. 2026

❖ Discussion in Scopaff

● Pydiflumetofen

- Commission propose approval. Multiple discussions in Scopaff

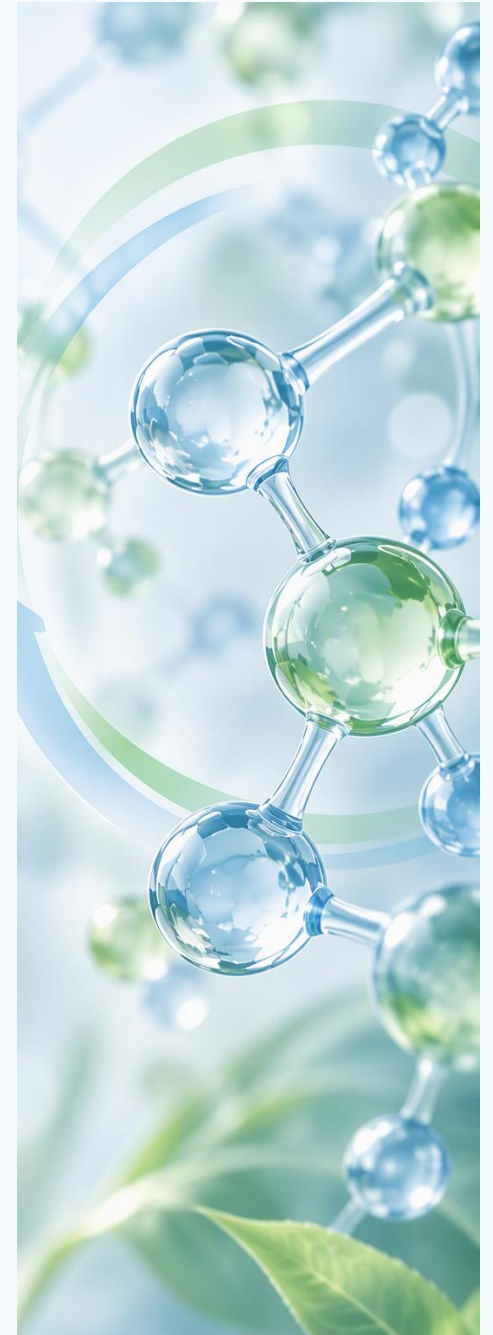
● Metyltepraprole

- EFSA conclusions Apr 26
 - Several data gaps, including unconclusive on ED for ecotox
 - Several hurdles foreseen for AS approval and PPP

❖ Ongoing process before EFSA conclusions

● Inpyrfluxam

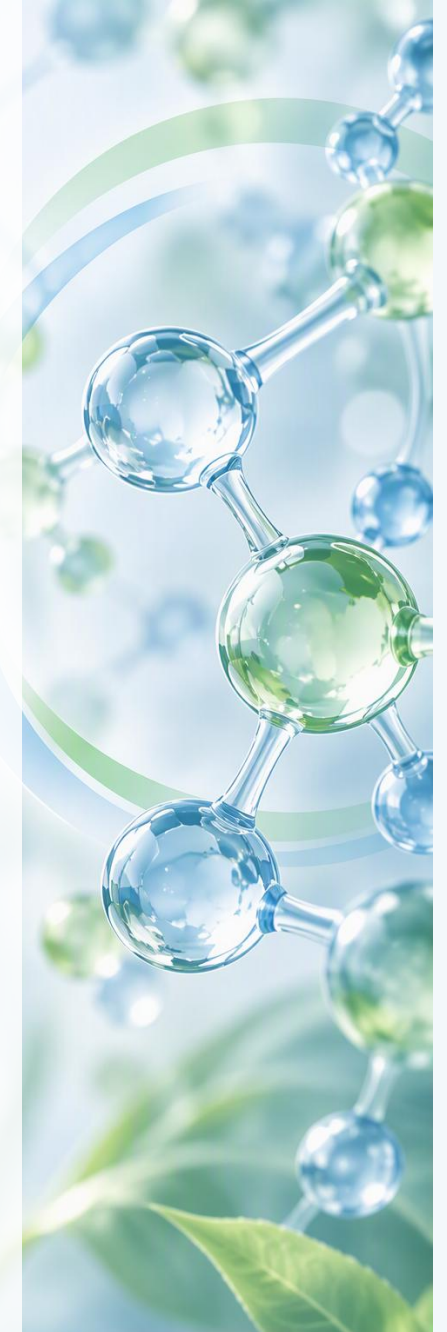
- Commenting period started 9-Feb 26
- No apparent big hurdles



Regulatory – Focus – Renewals – Sep 2026

❖ Discussion in Scopaff

- **Prothioconazole**
 - Moved 1 step further. Several delays
- **Cyprodinil**
 - Non-renewal proposed due to ED. Under discussion
- **Fludioxonil**
 - Non-renewal proposed due to ED. Under discussion
- **Flutolanil**
 - Non-renewal proposed. Under discussion
- **Tebuconazole**
 - New mandate open due to R1B classification.



Actives Under Renewal - Sept 2026

Active	Under renewal	Applicants	RMS	Estimated outcome timing
Amisulbrom	Yes	Nissan	EL	>2028
Azoxystrobin	Yes	ADAMA, CIECH, Sharda, SIPCAM OXON, UPL, Syngenta	AT	>2029
Benzovindiflupyr (Solatenol)	Yes	Syngenta	FR	>2028
Cyazofamid	Yes	ISK	FR	>2027
Cyflufenamid	Yes	Nisso	DE	>2028
Cyprodinil	Yes	Syngenta	FR	>2027
Difenoconazole	Yes	Globachem, Syngenta	ES	>2028
Dithianon	Yes	BASF	AT	>2029
Fluazinam	Yes	Adama, Finchimica	AT	>2028

Actives Under Renewal – Sept 2026

Active	Under renewal	Applicants	RMS	Estimated outcome timing
Fludioxonil	Yes	Syngenta	FR	>2027
Fluopyram	Yes	Bayer	AT	>2028
Flutianil	Yes	OAT Agrio	DE	>2030
Flutolanil	Yes	Nihon Nohyaku	NL	>2027
Fluxapyroxad	Yes	BASF	FR	>2028
Fosetyl-aluminium	Yes	Bayer + Generics	FR	2026
Mefentrifluconazole	No	BASF	ES	-

Actives – Sept 2026

Active	Under renewal	Applicants	RMS	Estimated outcome timing
Metalaxyl-M	No	Syngenta	BE	-
Metconazole	No	BASF	BE	-
Propamocarb	Yes	Bayer, Arysta, Lifescience	PT	>2028
Prothioconazole	Yes	Bayer	PL	2027
Pyraclostrobin	No	BASF	DE	-
Tebuconazole	Yes	Bayer, Adama, Nufarm,...	DK	>2027
Tetraconazole	Yes	Isagro	FR	>2028
Trifloxystrobin	No	Bayer	-	-

Food & Feed Omnibus

EU simplification



Indicative Timeline



Wrap Up

- Negotiations ongoing on EU alignment
- Details and impacts will be better understood on publication of primary and secondary legislation (late 2026) post EU summit
- New fungicides products exist in GB not approved in EU
- Non-renewed EU actives exist in GB which are no longer approved in EU
- Industry are actively seeking trilateral discussions with DEFRA (the policy maker) and CRD (the regulator) on operational policy considerations
- A lot of SCOPAFF activity on renewals and new actives ongoing in EU which will adjust the future landscape for fungicides
- EU actively discussing aspects to reduce regulatory burden and speed up market access under 'The Food and Feed Omnibus'



WATCH THIS SPACE

FOR FURTHER DEVELOPMENTS ON
EU & UK ALIGNMENT!

