NFU Cymru Consultation Response

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NFU Cymru Response:
Welsh Government Consultation –
Draft Climate Change Adaptation Plan for Wales

NFU Cymru welcomes the opportunity to respond to the Welsh Government consultation on the draft Climate Change Adaptation Plan for Wales which sets out actions to help Wales adapt to the impacts of climate change.

NFU Cymru champions Welsh farming and represents farmers throughout Wales and across all sectors. Our vision is for a productive, profitable and progressive Welsh agricultural industry and our aim is to establish the background conditions in which farm businesses can be profitable and develop.

The importance of the farming industry in rural Wales cannot be over-stated. Welsh farming businesses are the backbone of the Welsh rural economy, the axis around which rural communities turn. The raw ingredients that we produce are the cornerstone of the multi million pound Welsh food and drink industry which is Wales' largest employer, employing over 222,400 people.

Welsh farmers also play a key role maintaining and enhancing our natural environment – Wales' key asset. Farming activity supports a diverse range of species, habitats and ecosystems, provides a range of ecosystem services including flood alleviation, carbon sequestration, climate change mitigation; and delivers the backdrop for Wales' tourism and recreation sector worth an estimated £2.5bn annually.

Overall Welsh farming makes a unique contribution to the social, economic, environmental and cultural well-being of Wales in line with the Well-Being of Future Generations Act summarised in Annex 1.

There is a need to recognise that as farmers manage 80% of the land area of Wales, they are key drivers within rural economies and communities. They are also key deliverers of a broad range of goods and services for society including food. It is, therefore, vital that the views put forward within this response are adequately 'weighted' to reflect this fact.

It is also important to recognise that the farming sector's interest in the Climate Change Adaptation Plan can broadly be categorised as twofold. Farmers will have a direct interest in adaptation measures where risks are expected to farming and food production as a result of changes in climatic conditions. Given that farmers manage 80% of the land area of Wales, farmers will also have a key role supporting other sectors and wider society to adapt to climate change impacts, for example, flooding.

We note the UK Committee on Climate Change (UKCCC) has produced a report summary for Wales which sets out a national assessment of risks and opportunities from climate change impacting on Wales from now until the end of the century. The highest risks are summarised as follows:

- Risks to infrastructure from all sources of flooding

- Risks to public water supplies from drought and low flows
- Land management practices exacerbating flood risk
- Risks to ecosystems and agricultural businesses from changes in climatic conditions

NFU Cymru would make the following comments:

- Risks to infrastructure from all sources of flooding

NFU Cymru would highlight that agriculture is often at the mercy of extreme and changeable weather. We recognise that agriculture has a role to play in flood risk management, but the future approach must be more coherent and planned to better protect agricultural land, rural communities as well as urban areas. Where farmers provide a service in mitigating flood risk to help protect others they must be fairly compensated. Compensation must reflect the true costs of crop damage, lost production as well as full remediation.

Current funding mechanism prioritises people, property and infrastructure and as a result funding for rural areas and farmland is limited. As a consequence of this prioritisation rural communities and farmers experience a lack of maintenance of watercourse and coastal channels, banks and fluvial assets and as a result more frequent, more extensive and longer duration flooding. This is an unsustainable and inequitable outcome.

In our view, at present farmland and rural communities are too often being sacrificed as the lowest priority when determining investment decisions. We would highlight that some of our highest quality agricultural land is vulnerable to flooding. The contribution of Welsh farms should not be ignored if the nation is to become less dependent on food imports. The farming sector is also major employer as set out in Annex 1.

The future approach needs to rebalance the priorities towards the true value of agriculture, rural areas, communities, environmental benefits and critical infrastructure. The Climate Change Adaptation Plan should ensure that farmland is properly valued in terms of its long term benefit to society; critically, consideration must be given to the future value of agricultural production.

The Climate Change Adaptation Plan also needs to recognise that reducing flood risk may not be possible. It is likely to become increasingly difficult to reduce flood risk when flooding is expected to be more frequent and more extreme.

- Risks to public water supplies from drought and low flows

The Climate Change Adaptation Plan should also recognise risks to agriculture from drought and low flows.

The summer of 2018 demonstrated how farming is on the front line of climate change impacts, with drought conditions impacting all sectors. Whilst the record breaking heatwave may seem a distant memory, many farmers are still struggling with the aftermath. The drought conditions impacted grass yields and quality, also limiting the available for forage stocks for the winter. Private water supplies were impacted limiting the availability of water for livestock; in the arable sector farmers experienced variable crop yields as well as impacts to quality. The ability of farmers to meet their contractual obligations under agri-environment schemes was also challenged with crops establishment failures for wildlife and bird seed mixed as well as new farm woodland.

The IPCC UKCIP18 climate projections are clear about the risk of hotter, drier summers in future. Our future climate will be one of extremes and more extreme extremes. Even if additional resilience is built into our farm businesses and farmland, both will be challenged in the future in a way that is outside our collective experience. From our current position of relative ‘comfort, we should not

underestimate how difficult food production and environmental protection could be in a world that will be at least 1.5 degrees C warmer.

Learning the lessons of the past is critical to ensure food supply remains resilient and farmers can better manage volatility. Future policy should incentivise investment in farm reservoirs and water efficiency measures. Policy measures are also required to support farmers in managing the impacts of weather and market-related volatility. In a changing climate, with more extreme extremes we also ask how Welsh Government proposes to embed this flexibility into future scheme design. The risk of not meeting contractual obligations due to climate conditions is a key concern to our members and a potential barrier to uptake of future schemes. The inherent volatility embedded into a results-based public goods scheme is also a concern to our members given many outcomes are impacted by weather conditions which vary year to year and expected to become more variable and extreme in the future.

Water for food production must also be a strategic priority for Welsh Government and reflected in the Climate Change Adaptation Plan.

For example, NFU Cymru would emphasise that the arable and horticulture sectors are small but important in Wales. The Welsh Government Strategic Action Plan for the Welsh Horticulture Industry, for example, identifies that *'The need for food security and greater self-sufficiency as well as the global effects of climate change are likely to increase pressures to produce greater yields of food crops in Wales using technically efficient, low-energy, sustainable and environmentally benign methods'.*

We would highlight that in England and Wales, farmers and growers use less than 2% of total water abstracted, so water allocation for food production is minor compared to the public supply and energy sectors.

By contrast, the world's agricultural production contributes 92% to the global water footprint, with about one fifth of that footprint relating to production for export[1]. Of the UK's total water footprint, 75% is attributed to 'external' sources, or imported goods[2].

Meanwhile, global climate change means that the UK will need to increase its home food and water security to offset potential disruption of food imports from countries that face even more extreme weather events and conditions than us.

There are, therefore, persuasive reasons to encourage the home production of horticultural products to displace imported goods with a higher water footprint, from countries which face greater climate change pressures than the UK. This aligns with the new Well-Being of Future Generations (Wales) Act 2015 and the goal of being a 'Globally Responsible Wales'.

To conclude NFU Cymru believes it is vital that the Climate Change Adaptation Plan recognises the need for water for food production as well as public supply in this context.

NFU Cymru is also clear that water is a key natural resource of strategic importance to Wales. We note the Welsh Government, through the Water Strategy for Wales has committed to undertake research to identify and understand the future economic value of our water, and the benefits and opportunities that it can provide nationally and globally. We look forward to the findings of this work.

- Risks to ecosystems and agricultural businesses from changes in climatic conditions

[1] National water footprints accounts: MM Mekonnen & AY Hoekstra 2011 Water footprint report
[2] National water footprint explorer

As above, the challenging weather conditions of 2018 demonstrate clearly that farmers are on the frontline when it comes to climate change. As we anticipate changes in weather patterns, measures must be put in place that support farm businesses in managing volatility, encouraging investment and building resilience. This is vital when it comes to UK food security in a world where food production will be increasingly challenged by more volatile weather.

Proposals for climate change adaptation and decarbonisation for agriculture must also be framed within the Paris Climate Agreement 2015. This recognises the fundamental priority of safeguarding food security and ending hunger, and the particular vulnerabilities of food production systems to the adverse impacts of climate change. The Paris Climate Agreement includes a commitment to strengthen the global response to the threat of climate change in a manner that does not threaten food production.

In our view the commitment of the Paris Climate Agreement is not adequately reflected in Welsh Government proposals for 'adaptive nature and the rural economy'. Safeguarding food security should be a key test given that the challenges to our global food production system over the same timescales. These are now well documented (see for example the Foresight Report, 2011). Challenges include climate change, growing UK and global populations, dietary changes and increasing demand for protein together with scarcity of resources globally including land and water.

Given our climate and rainfall, Wales is predicted to be an area favoured for agricultural production in the future. It is important to note that whilst the climate may well get warmer, the topography and soil types in Wales means that a broader range of arable and horticulture crops may be grown, although, we foresee that livestock systems are likely to continue to predominate in future. It is vital that the importance of agricultural production and maintaining our agricultural productive capacity in Wales is recognised and secured through the Adaptation Plan.

We would further highlight that Welsh Government has a duty to ensure this through the Well-Being of Future Generations Act and the globally responsible goal. It would not be a sustainable or, indeed, a 'globally responsible' position for Welsh Government emissions targets for the sector to be achieved through displacement of food production in Wales to other parts of the world and an increased reliance on imports through 'off-shoring'.

Overall, Welsh Government should ensure it has the right policies in place to enable home food production, and the Welsh farming industry, to achieve its potential producing safe, high quality affordable food whilst meeting the climate change challenge.

Turning specifically to the urgent risks identified under the 'Adaptive nature and the rural economy' chapter of the adaptation plan, NFU Cymru would make the following comments:

- Risks to habitats due to inability to respond and opportunities from new species colonisations

The Climate Change Adaptation Plan needs to recognise that the baseline is moving and that things in the future will be different because the climate is changing. For example, an increase in biodiversity should not be expected to mean more numbers of the same species or more species which the habitat might be expected to support currently, rather the species and numbers might be completely different in the future.

- Risks and opportunities from changes in agriculture and forest land suitability

A changing climate is likely bring about new opportunities as well as risks to food production systems in Wales. Whilst grass based production systems are likely to continue to predominate, there are likely to be new opportunities for a range of crops arising from a changing climate. We note the Welsh Government Land Capability, Suitability and Climate Programme which is due to report by

June 2020 is expected to produce agricultural capability maps and assess the suitability of crops under different climate change scenarios.

Overall it is vital, given the predicted challenges to our global food production system, that Wales's agricultural productivity is maintained and enhanced over the long-term and that agricultural land is protected both from development and land use change.

We are clear that climate change will bring opportunities to many farm businesses in Wales. The Land Capability, Suitability and Climate Programme described above will be useful at a strategic level in establishing what these opportunities are likely to be. We suggest there is also a task in identifying and working with farmers to identify what the benefits are at a farm level to support adaptation and allow farmers to embrace new opportunities. We are clear, regulatory and other barriers should not be put in the way of farmers moving forward.

NFU Cymru noted with interest the approach taken with the "10 Million Trees" tree-planting project in Mbale, Uganda, which receives ongoing funding under Welsh Government's Wales for Africa programme. It says that it *"showcases pioneering work in providing incomes for farmers and families through fruit and coffee crops and bee-keeping, shade for animals and people, soil stabilization, as well as providing a carbon store for emissions"*.

We do query why the Welsh Government approach to this programme appears to be so different to proposals for Wales where large scale afforestation appears to be the preferred Welsh Government route. The proposals in the Welsh Government Low Carbon Pathway consultation (2018) is for a doubling of the emissions sink arising from forestry by 2050. This, it is proposed, will be delivered largely through afforestation (90%) with some contribution from agro-forestry (10%). This is suggested to equate to approximately 66,000 hectares of new planting. To put this scale of land use change into context, we understand the Welsh Government Woodland Estate extends to approximately 126,000ha currently. The average farm size in Wales is 48ha. To achieve afforestation on the scale proposed will require the complete afforestation of some 1400 farms in Wales.

No assessment of impact has been provided on those farming families affected, rural communities, the rural economy or indeed, food as one of Wales's foundation sectors, the Welsh language or environment. However, we reiterate our concerns from previous consultation responses – a change on this scale is likely to be highly emotive. Farmers in Wales as managers of 80% of the land area of Wales recognise the very significant role we have to play in contributing to the decarbonisation agenda, but we are clear the burden of decarbonisation must not fall unequally on the farming sector, or indeed on rural Wales.

With respect to proposals for agro-forestry, we would highlight that many farmers in Wales recognise the multiple benefits of woodland on-farm including improved productivity through shelter and enhanced biosecurity; biodiversity, soils and water as well as the provision of timber and wood fuel which have the potential to both reduce costs and deliver additional diversified income.

In line with Welsh Government strategy, NFU Cymru is supportive of measures that facilitate and adequately reward farmers for additional woodland planting and ongoing management on farms in Wales. It has been our experience that many farmers are prepared to consider farm woodland at an appropriate scale including small scale shelter belts, field corners and parcels with a mixture of deciduous and evergreen species of both trees and shrubs together with hedgerows and streamside corridors that contribute to improved connectivity at the landscape scale.

Whilst farmers are likely to strongly resist afforestation on their best, most productive agricultural land, there are possible parcel scale opportunities on marginal land and farmers would possibly be prepared to consider afforestation on a bigger scale with appropriate levels of long-term support.

Few farmers can afford to wait 40 years for a crop of timber to mature for their income; nor can the local businesses who are dependent on farmers for their income currently.

It is important to recognise that once planted this land is permanently lost from agricultural production and the market price devalued accordingly. Regulation prevents land use change back to agriculture and the extent to which this is a sustainable position for Government, farm businesses or indeed society given the predicted challenges to our global food production system is far from clear.

We would also take this opportunity to refer to renewables. NFU Cymru would highlight that with over 80% of national land area managed by farmers, we have a significant interest in land-based renewable energy production. We believe more credit should be given for agriculture's potential to decarbonise the rest of the economy through land-based renewables.

With power generation dominating GHG emissions in Wales, there is scope to make rapid progress in clean electricity production from a variety of land-based as well as offshore renewables. We recognise that onshore wind power and solar are now the lowest-cost new sources of electricity, deliverable on a timescale of a few years. The planning system in Wales needs to accommodate increased deployment of these sources, reinforced by co-located battery storage systems. Developers, whether local enterprises or third-party investors, require a 'route to market' in the form of long-term off-taker guarantees or underwriting.

Between now and 2030, we anticipate new opportunities in the near future for further growth in AD biomethane plants, displacing fossil fuel gas in the gas network, and supplying up to one-third of domestic heating needs.

We would highlight that agriculture has a potential opportunity to offset some of its intractable GHG emissions from food production, some through 'natural' carbon storage in soils and vegetation (in collaboration with the land use and forest sector), but on a larger scale through other greenhouse gas removal mechanisms. These include a variety of forms of bioenergy with carbon capture, as well as greater use of bio-based products and materials, in industry and the built environment – all of which are likely to present possible opportunities to the agricultural sector.

- Risks to carbon stores and sequestration

The extent to which Welsh peatlands actually actively sequester carbon needs to be understood.

- Risks to agriculture and wildlife from water scarcity and flooding

You are referred to earlier comments relating to flooding and availability of water for food production.

- Risks to freshwater species from higher water temperatures

We would highlight that whilst farming activities have been in sharp focus with respect to water quality and pollution incidents in Wales, the evidence is clear that there are a range of factors influencing water quality in Wales, agriculture is just one. This is not always clear in how water quality issues in Wales are portrayed and in the future, risks to freshwater species from higher water temperatures and other climate change impacts (including low flows) need to be properly understood and communicated to all concerned. NFU Cymru is clear that a focus on one sector alone is unlikely to deliver the water desired quality improvements now or in the future under the range of climate change scenarios. We are also clear that practical measures that farmers are required to take prevent or minimise the impacts to freshwater species of higher water temperatures and other impacts must be properly incentivised and fairly rewarded.

- Risks and opportunities from long-term, climate related changes in global food production

The risks to the global food production system are referred to above. Overall, Welsh Government should ensure that Wales's agricultural productive capacity is maintained and enhanced and not diminished through the actions set out in the Climate Change Adaptation Plan.

In addition NFU Cymru would suggest that emergency response to and support for recovery from extreme weather events needs to be included within the Climate Change Adaptation Plan. We would stress that adaptation is not just about getting better prepared for slow gradual changes to climatic conditions.

We would also highlight the role of research and development, development of innovative tools, technologies and practices and knowledge exchange, all of which will be critical to addressing climate change challenges that Welsh farmers face.

The draft adaptation plan identifies that other risks are being addressed through current actions. This includes risks to agriculture, forestry, landscapes and wildlife from pests, pathogens and invasive species. NFU Cymru would question the extent to which there is ongoing work being undertaken specifically on risks to animal health and welfare as a result of changing weather patterns and new and emerging diseases. This should be a key priority within the Climate Change Adaptation Plan given the importance of food and farming to the Welsh economy and the temporal scale over which adaptation may be required to take place.

With respect to risks to agriculture, forestry, wildlife and heritage from a change in frequency and/or magnitude of extreme weather and wildfire events, NFU Cymru would take this opportunity to stress that current actions are inadequate to address wildfire events and our capacity to adapt to increasing risk of such events in the future. To the contrary, experiences of current agri-environment schemes suggests that there has been reduced ongoing active management with hefted flocks and Wales's native livestock breeds in key areas at risk of wildfire such as common land. Under-grazing and not overgrazing is now a key issue. We would highlight that whilst the 2018 'Brexit and our Land' consultation referred to reducing flood risk, however, little mention was made of management to reduce fire risk as a public good in a future land management scheme.

NFU Cymru is clear that this should be considered and valued as a public good very relevant to Wales. Evidence shows, between 2000 and 2008 there were over 55,000 recorded grassfires and nearly 550 forest fires in South Wales. This equates to eight times more per unit area than the UK as a whole. South Wales Fire and Rescue Service estimate an annual cost in their service area of around £7m due solely to wildfires. There are, of course, other costs with risks to property, human health, as well as increased water treatment costs where fires occur in catchments with abstraction points.

Prevention strategies must not only focus on public awareness and reducing ignitions but also active management through grazing livestock to reduce fuel build up. This should form a central strategy in Wales's Climate Change Adaption Plan.

In recent years, bigger fires have occurred as fuel levels have been allowed to build up largely coinciding with reduced levels of beneficial forms of active management such as grazing by hefted flocks. Active management by farmers has been increasingly challenged or indeed, discouraged through agri-environment approaches such as Glastir and a future Public Goods scheme will need to address this for its tangible value to society.

Whilst this may be perceived as primarily an issue for the urban fringes, we would highlight that active management through grazing provides benefits in the form of reduced fire risk across Wales and in more rural areas – for example on sites where military training occurs such as the

Sennybridge Training Area. The recent case of the fire on the Common on Llantysilio Mountain affected local tourism businesses with closures that lasted over a week.

Overall it is important to recognise that reduced farm viability will be associated with the loss of traditional practices and diminishing levels of active management in areas vulnerable to fire hazard. Future policy needs to ensure that these practices are safeguarded and form a central action within the future Climate Change Adaptation Plan.

The ongoing actions within the draft Climate Change Adaptation Plan are noted. Our comments relating to woodland creation are made earlier in this response. We would agree that future land management policy should recognise the public goods delivered through existing farm woodland and include measures and support to bring existing woodlands into favourable management.

Through consultation with our members, many highlighted concerns with respect to invasive non-native species. Increased habitat connectivity will be a key adaptation action that farmers will be expected to deliver in meeting climate change adaptation goals, however, it is important to recognise that such connectivity also facilitates movement invasion of non-native species. Farmers should not be expected to bear the cost and burden of dealing with INNS and more comprehensive eradication strategies are required.

NFU Cymru comments with respect to flooding and drought in agriculture have been highlighted above. We note that work established under the Climate Smart Agriculture Mitigation and Adaptation Framework is being taken forward through the next phase of the Sustainability Brand Values Programme. This programme will identify the values needed to underpin a sustainability brand for Welsh farming, climate change mitigation and adaptation will be important components.

Overall NFU Cymru is clear that farmers in Wales operate to world leading standards and there is considerable scope to gain a marketing advantage through positive and proactive marketing of Welsh produce.

Finally with respect to specific potential actions, we note Welsh Government propose to provide post-Brexit support in the form of a land management programme that contains a public goods scheme and economic resilience scheme that delivers climate change adaptation. The full NFU Cymru response to the Brexit and Our Land consultation is available here.

Overall, NFU Cymru would take this opportunity to highlight that future land management policy will need to deliver and balance a far broader suite of outcomes and multiple benefits for society than decarbonisation and climate change adaptation alone.

Welsh Government has a duty under the Well-Being of Future Generations Act to improve economic, environmental, social and cultural well-being in Wales. We are clear that appropriate measures to support farmers to adapt to climate change impacts should form part of future land management policy. Measures that fairly reward farmers to wider climate change adaptation actions should also be included. NFU Cymru would reiterate that an appropriate balance must be struck and Wales's agricultural productive capacity should be maintained and enhanced.

We would also express concern about the rate of change from existing to new schemes and the very short time they provide to farmers to allow to adapt not only to climate change impacts, but to other structural changes such as market access and support regimes.

We would also highlight that Chapter 7 of the Welsh Government 'Brexit and our Land' consultation referred to the future regulatory baseline. NFU Cymru is clear that future regulation should be evidence led, proportionate and outcome focussed. In line with the principles of SMNR, regulation will also need to be adaptive to changing conditions. We would stress that blunt regulation can lead

to negative unintended consequences for both farming and the environment. For example, the farming by calendar approach to nutrient management proposed in the new water regulations for farming do not in any way recognise that the climate is changing nor do they provide farm businesses with any potential to adapt. This is highly concerning given the projections set out earlier in this response.

Finally, NFU Cymru notes that climate risks will be integrated and considered in all future policy and business planning within Welsh Government by 2020. This will include the integrated impact assessment and updating the statutory guidance.

We express disappointment that Welsh Government has opted not to publish an impact assessment or any cost-benefit analysis alongside the consultation. Welsh Government through its Climate Change Adaptation Plan should aim to strike an appropriate balance of adaptation actions alongside meeting wider economic, environmental, social and cultural objectives. As above, NFU Cymru recognises that adaptation to changes in climatic conditions will be central to the success of farm businesses going forward. Farmers also have a key role, given they manage 80% of the land area of Wales, to contribute to climate change adaptation for wider society. We are clear that this should be achieved in a way that does not threaten food production in Wales.

Annex 1 - The Contribution of Agriculture to the Well-Being of Wales

The Welsh Government Well-Being of Future Generations (Wales) Act 2015 is designed to improve the social, economic, environmental and cultural well-being of Wales. The Act establishes seven goals that all public bodies, including Welsh Ministers, must work to achieve. The contribution that farming makes to achievement of all seven goals is unparalleled by any other industry, as highlighted in the following below:

Well Being of Future Generations Act: **Well-being Goals**	**NFU Cymru: Agriculture is the Answer**
A prosperous Wales	• 60,000 employed full or part time in farming in Wales • £1.5bn Gross Output • Farming underpins a food supply chain worth over £6bn • Over 220, 000 people in Wales are employed in the agri-food sectors – that's 17% of the workforce and Wales's biggest employer • The Welsh countryside managed by farmers provides the backdrop for the tourism industry worth over £2.5bn • **The Welsh agricultural industry is a key generator of wealth and employment for the people of Wales**
A resilient Wales	• Farmers care for 81% of total land area of Wales – that's over 1.84m hectares • 600,000 ha of environmentally designated areas • Almost 560,000 ha managed under Glastir Entry Sustainable Land Management Scheme designed to combat climate change, improve water management and maintain and enhance biodiversity • Farming supports a diverse range of species, habitats and ecosystems • Farmers provide a range of ecosystem services including carbon sequestration and management, water quality and water quantity management for flood alleviation • Low carbon, local energy installations have the potential to meet 57% of Wales's electricity consumption and the evidence shows a large proportion of projects are located within Wales's rural local authorities • GHG emissions from agriculture have declined by 20% since 1990 and further decreases are being achieved through production efficiency measures • **Welsh farmers play a key role maintaining and enhancing our natural environment and supporting the provision of a full range of ecosystem services**
A healthier Wales	• Welsh agriculture is a key provider of safe, nutritious, high quality Welsh food which plays a fundamental contribution in supporting the physical and mental well-being of the people of Wales • Welsh farmers are known to operate to some of the highest standards of welfare and production in the whole world • Welsh farming also delivers a significant proportion of Wales's access provision which includes 16000 miles of footpaths, 3000 miles bridleways, 1200 miles of cycle network, and 460,000 ha of open access land • **Welsh farming makes a key contribution to the physical and mental well-being of the people of Wales**
A more equal Wales	• Rural Wales is home to 33% of the Welsh population. • The vitality and potential of rural areas is closely linked to the

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	presence of a competitive and dynamic farming sector. The NFU Cymru 'Why farming Matters to the Welsh Economy' shows that each family farm is typically economically linked to some 40-80 other businesses in the region • **Through direct and indirect employment in rural communities, Welsh farming underpins the rural economy and contributes to a more equal Wales**
A Wales of cohesive communities	• Local communities in rural Wales are heavily dependent on agriculture for financial and social prosperity. • Leadership and voluntary roles in rural communities • **Welsh farmers make a key contribution towards the provision of attractive, viable, safe communities in rural areas**
A Wales of vibrant culture and thriving Welsh language	• Agriculture has the highest proportion of Welsh speakers of any sector. • Farming is the bedrock of rural communities across Wales which have been shaped by farming activity spanning hundreds of years. Farmers continue to maintain these traditions, preserving rural culture and sense of place • **Welsh farmers are key promoters and protectors of our culture, heritage and the Welsh language**
A globally responsible Wales	• Current levels of self-sufficiency at a UK level are at 62% • Future challenges to our global food production system include climate change, a growing UK and global population, water scarcity. Given its climate and rainfall, Wales is predicted to be an area of favoured production in the future • **Welsh farmers have a key role to play feeding the people of Wales and in contributing to global food security now and in the future.**