

FARMING – BRINGING WALES TOGETHER



An illustration of how Welsh agriculture delivers the Well-being of Future Generations Act



FOREWORD



Agriculture's contribution to the economic, environmental, social and cultural well-being of Wales is unrivalled. Farming's impression on Wales' landscape, heritage and sense of place over generations is unsurpassed. Through this document, NFU Cymru is proud to showcase every aspect of what farming means to Wales - the significance of the sector to all aspects of Welsh life.

Framed around the seven well-being goals enshrined in the *Well-being of Future Generations Act 2015*, NFU Cymru has sourced case studies from within its membership, each demonstrating the specific contributions the industry makes to the well-being of the people of Wales and further afield, now and in the future.

These real life, everyday examples of innovation, commitment and sheer hard work taking place on farms and in rural communities across Wales, highlight the importance of a vibrant, dynamic, profitable agricultural industry within Wales and the need for it to thrive.

Welsh farmers contribute significantly to the economy of Wales, both directly as primary producers, forming the foundation of the £6 billion food and drink industry, and indirectly, as the cornerstone of the rural economy. This skilled effort of farmers in managing over 80% of the nation's land, helps to care and enhance the quality of the natural environment, and safeguards our key natural

resources, providing the stunning backdrop – our treasured Welsh landscape – for the tourism and recreation sector in Wales, worth over £2.8bn.

Welsh farmers are also the essence of Wales' culture and community. The prevalence of the Welsh language within the farming sector is higher than in any other sector, keeping the language alive in many rural populations across Wales. Members of the agricultural industry are often at the heart of many rural communities across the country, as part of community groups, or in voluntary or leadership roles throughout rural Wales.

Through '*Farming- Bringing Wales Together*', NFU Cymru provides a snapshot of the important work done by farmers across Wales and their contribution to the economic, environmental, social and cultural well-being of Wales. It is a contribution NFU Cymru is immensely proud of and it demonstrates the wide reaching and fundamental importance of having a productive, profitable and progressive agricultural industry within Wales.

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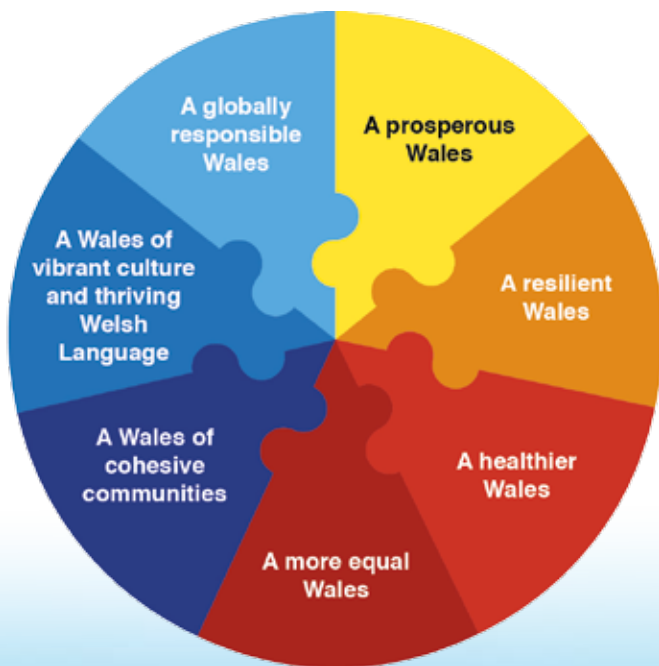
Stephen James
President
NFU Cymru



INTRODUCTION

The decision to leave the European Union presents us with a unique opportunity to set out a clear vision for the future of agriculture in Wales. It provides us with the chance to shape and develop policies that will enable us to realise our ambition of a productive, progressive and profitable industry, developed within the framework of the Well-being of Future Generations Act 2015.

This key piece of legislation focuses on 'improving the social, economic, environmental and cultural well-being of Wales' and establishes a duty on public bodies to work to achieve the vision for Wales set out in the seven well-being goals.



This legislative framework allows for the establishment of a new deal with society – a consensus on what farming can deliver for the economy and consumers; for the environment and our treasured Welsh landscape; for our Welsh culture and heritage; and for communities across Wales; now and in the future.

This process begins with developing our understanding of what farming means to Wales and exploring its future potential. In this document NFU Cymru showcases 14 case study examples that effectively 'bring to life' how the agricultural industry is a key contributor to all seven well-being goals in a way that is unparalleled by any other sector.

It is important to note that many of the wider benefits that farming, and the presence of a vibrant and dynamic Welsh agricultural industry, provides are not always recognised in conventional markets, and do not attract a return from the marketplace. They are, nonetheless, central to the well-being of the people of Wales. Through this publication we aim to highlight the extensive benefits that agriculture provides to the wider economy, society and environment, as well as the strategic importance of the sector to Wales at this most pivotal time in the history of our nation.



A PROSPEROUS WALES

The Welsh agricultural industry is a key generator of wealth and employment for the people of Wales.

First and foremost Welsh farmers are food producers, producing top quality produce to world leading environmental and animal welfare standards. Welsh farmers are an integral part of the UK's largest manufacturing sector, the food and drink industry. Farming underpins the food and drink supply chain worth over £6bn to Wales and the country's biggest employer. The industry employs 17% of the workforce- over 220,000 people, with around 58,000

employed full or part time on farm holdings in Wales.

Welsh farmers also create the backdrop for the tourism industry worth over £2.8bn. As well as being key destination providers through a range of on-farm diversification enterprises; they are also fundamental to the shaping and the ongoing management of Wales' spectacular landscape and scenery which attracts thousands of visitors from around the world each year. There can be no doubt that farming and tourism are inherently interlinked.

The Welsh agricultural industry is a key generator of wealth and employment for the people of Wales



£1.5 BILLION

Welsh agriculture's gross output



A PROSPEROUS WALES

NAME: Kate Beavan

REGION: Abergavenny, Monmouthshire

SECTOR: Beef and sheep



The Beavan family farm across two holdings in a family partnership producing prize winning stock and some of which is retailed through the local family owned butcher's shop in nearby Abergavenny, six miles away. The farm has been in the Beavan family for generations and is worked in partnership with Kate's husband Jim, his brother Huw and their parents. The business currently supports three generations of the family, employing across all the enterprises. The next generation of the family are showing interest in both the agricultural and retailing aspects of the business.

Kate balances farming around her other commitments, which include lecturing animal health and welfare at Coleg Gwent, Usk Campus and running Kate's Country School which offers courses on rural skills and animal husbandry. She also has a passion for

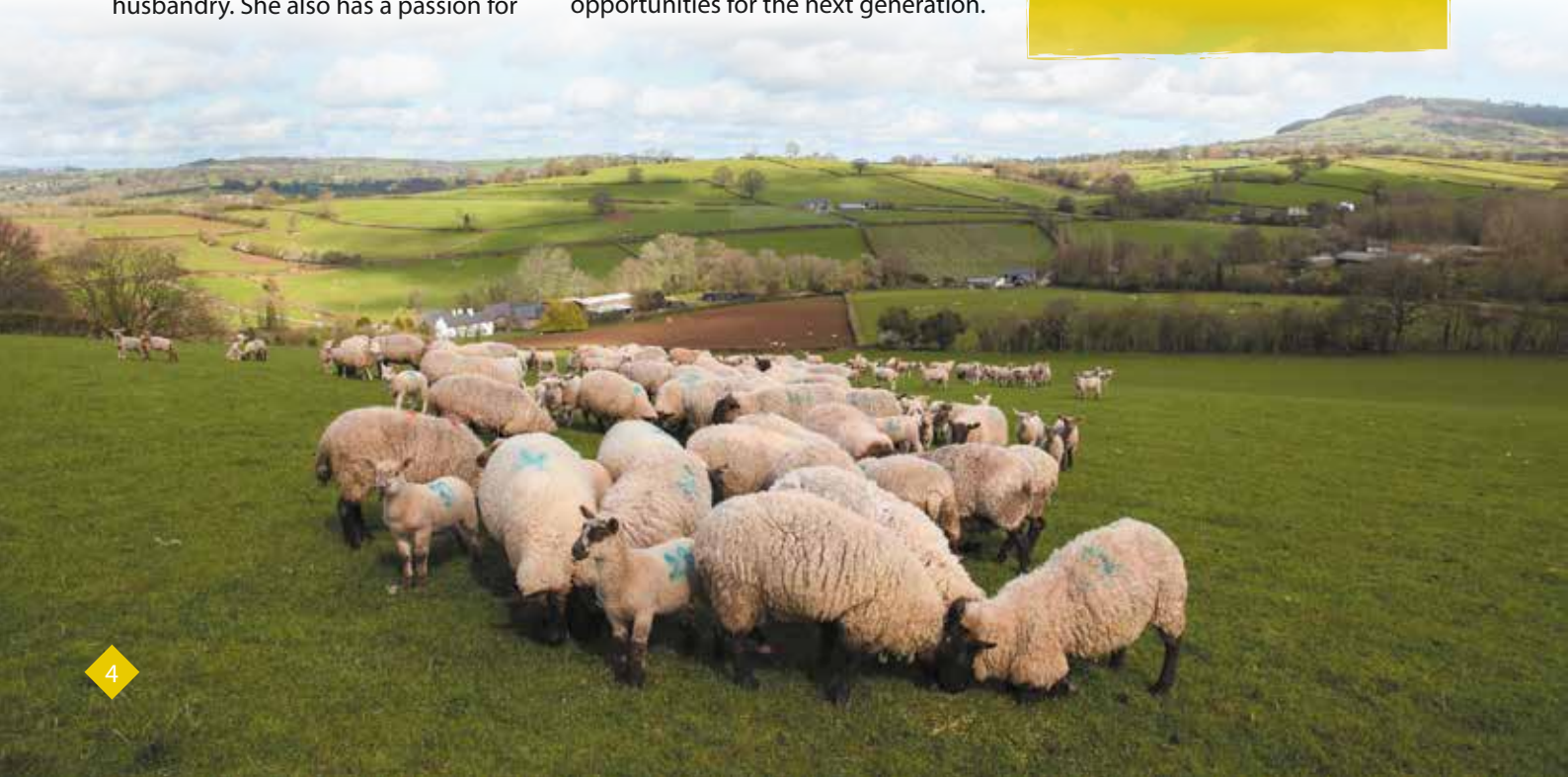
caring for the environment.

The farm is a Farming Connect Demonstration Farm, trialling the latest technology and innovation in agriculture, with the aim of trying to improve efficiencies in farming. The family are passionate about farming and keen to highlight the many roles within the agricultural industry that develop skills and expertise, working with people of all ages to help them learn about the industry.

The Beavans, like many farming families across Wales, produce top quality Welsh meat to world leading environmental and animal welfare standards and they take great pride in what they produce. Farming underpins the food and drink supply chain and the rural economy, creating employment and prosperity for Wales as well as providing employment opportunities for the next generation.

"As a farmer, food production is our primary role. At our family farm we produce top quality meat, some of which is retailed through the family butcher's shop."

Three generations of the Beavan family currently live and work on the farm



A PROSPEROUS WALES

NAME: Rhys Lougher

REGION: Bridgend, Glamorgan

SECTOR: Dairy



Rhys Lougher farms a traditional Welsh family dairy farm, Tŷ Tanglwyst Dairy, on the Bridgend coast. He is one of the three generations of the Lougher family who live and work on the 150 acre farm. The farm runs 110 pedigree Holstein cows which are milked three times a day, with all the cows having been born on the farm.

The Lougher family process all the milk they produce in a purpose built modern dairy on the farm, just metres away from the milking parlour. There the family bottle milk and produce cream and butter. The high production standards mean that each cow's milk is regularly, individually quality tested. Tŷ Tanglwyst Dairy produce is then retailed locally, mainly within half an hour of the farm, to cafés, nurseries, and pubs, as well as on a traditional milk round, building a strong brand that is associated with a quality product. The family believe that their locally produced food benefits the

environment through reducing food miles, as well as ensuring effective traceability and increased consumer awareness of where their food comes from. The farm now employs 14 people, working in a variety of roles such as production, administration and delivery drivers.

Connecting with the customer is a key objective for Tŷ Tanglwyst Dairy. Rhys participates in Open Farm Sunday every year, also hosting school visits and local community group visits to the farm.

The Lougher family dairy farm demonstrates the role high quality Welsh produce has in supporting the local community and rural economy. Their desire to sell locally means their farm has a direct link to the local supply chain which strengthens the local economy. This, in turn, supports employment and underpins Wales' largest manufacturing sector, the food and drink industry.

"Food production is my main aim as a farmer. Through producing high quality milk, cream and butter and supplying local businesses I support the rural economy and create a sustainable business to pass onto the next generation."

Around 20,000 litres of milk are processed on the farm each week, which is then supplied to local businesses



A PROSPEROUS WALES

NAMES: Perkin and Janet Evans

REGION: Solva, Pembrokeshire

SECTOR: Arable and beef



Perkin and Janet Evans of Crug-Glas Farm, Solva, have adapted and developed their farming business to welcome visitors to their farm. Perkin is the second generation farming at Crug-Glas and has been farming since he was 16-years-old, with his two sons following in his footsteps. The family previously had a large dairy herd; however the time came when they had to make a decision: to either expand the amount of dairy cows or to adapt the business. Playing to their strengths - Janet's excellent hospitality and catering skills - and the outbuildings available on the farm, together with the beautiful location, the decision was made to adapt. Changing their farming model to an arable and store cattle enterprise, the family created a luxury country house hotel in the traditional farmhouse offering top quality Welsh hospitality with home cooked meals made with local produce.

The success of the country house hotel inspired the family to develop more of their farm buildings to set up The Cow Shed, a high quality wedding venue that can cater for up to 300 guests. This year's wedding calendar is full and the family are now taking bookings for two years in advance.

This continued expansion means the couple have around 40 local people on their books, as well as ensuring the business provides employment for their two sons on the farm. It also has a positive impact on the local economy - sourcing as much local produce as possible, as well as recommending other local businesses.

The farm and hotel businesses complement each other. Much of the draw for guests to the hotel is the fact it is located on a working family farm, and surrounded by beautiful countryside managed by the farm. Perkin explained that he often gets questions from visitors enquiring about the farm and the agricultural industry. The farm has had to adapt policies, and certain jobs cannot be done when functions are taking place, but the family work together.

The Evans family highlight the interlinking relationship with the agricultural and tourism industries in Wales. Many farm businesses now incorporate tourism and recreation enterprises to welcome visitors to experience the best of what Wales has to offer. The tourism industry in Wales is founded on our treasured Welsh landscape, shaped and managed by Welsh farmers.

"As farmers we manage much of Wales' land, providing a key draw for tourists. Many farmers, like us, have adapted their business to cater for the tourism sector to benefit their farm businesses as well as the wider rural economy."

Perkin and Janet have welcomed visitors from all over the world, including Japan, New Zealand, China and America

A RESILIENT WALES

Farmers are the primary caretakers of the land in Wales, managing over 80% of the land - over 1.84 million hectares which includes over 600,000 hectares of environmentally designated areas. Farmers are, and always have been, dependent on the land for their living so they have an inherent interest in maintaining and enhancing the condition of the environment.

The following three case studies exemplify the wide variety of ways that Welsh farmers maintain and enhance the quality of our natural environment, alongside their core food production role. This includes the provision of a range

of public benefits of value to society, including habitat creation and management, carbon storage, clean water and water storage to reduce flooding impacts.

Enhancing a healthy, natural, biodiverse environment is a key driver for many Welsh farmers. As custodians of much of the land within Wales, farmers want to leave the land and environment in a better condition for the next generation, a resounding and common motivation within the industry. The passion and drive demonstrated by farmers pan Wales, in all sectors and of all ages, is clear.

Welsh farmers play a key role maintaining and enhancing our natural environment and supporting the provision of a full range of ecosystem services



OVER 80%

of the land area of Wales is managed by farmers



A RESILIENT WALES

NAME: Hefin Jones

REGION: Betws-y-Coed, Mid Gwynedd

SECTOR: Beef and sheep



Hefin Jones is a third generation beef and sheep farmer with land in the Bethesda, Betws-y-Coed and Anglesey areas. Hefin farms various types of land, from mountainous unimproved land reaching up to 3,400 feet, productive lowland that has been improved, as well as severely disadvantaged area (SDA) land. Hefin lives in the area with his wife and young son, and explains how his passion and enthusiasm for farming began from a very young age. Having learnt his skills from his father and grandfather, Hefin acknowledges the need to adapt his farming policies with the changing times and his farm environment.

Hefin farms the native Welsh Mountain sheep on his mountain farm, as it's the only breed hardy enough to survive in the harsh conditions and landscape, along with Limousin cattle selling pedigree bulls for breeding.

As well as producing top quality stock, Hefin uses both his sheep and cattle as a management tool to care for the environment and manage the sensitive habitats reliant on the actions of grazed livestock.

Having been involved with schemes in the Snowdonia National Park, Tir Gofal and Glastir, Hefin explained that he used the schemes in combination with productive farming to deliver the best outcomes. Over the last 10 years Hefin's work has included building dry stone walls, laying hedging, shutting off streamside corridors and restoring buildings for agricultural use- working with the environment and enhancing the biodiversity on his farm.

The farm supports a wide range of habitats and species, from the endangered Twite bird to Sphagnum moss. Hefin is just one of many farmers across Wales successfully combining high quality commercial farming with the delivery of action to improve the quality of Wales' environment.

"As farmers we are the custodians of the land for future generations. Over the last 10 years, in association with environmental schemes, I have built around 3,000 square metres of dry stone walls, restored 2,500 metres of hedgerows, secured 1,000 metres of stream side corridors and planted 6,500 trees."

Of the 17 pairs of the Twite bird left in Wales, seven pairs are found around Hefin's farm

A RESILIENT WALES

NAMES: Alex and Jolyon Higgs

REGION: Tylwch, Montgomeryshire

SECTOR: Beef and sheep



Montgomeryshire hill farmers Alex and Jolyon Higgs place an emphasis within their business on environmental sustainability. At their 400 acre beef and sheep farm near Tylwch, the couple showcase many of the ways in which Welsh farmers are supporting Wales' transition to a low carbon economy.

In an attempt to use an abundant natural resource on their land - water - Alex and Jolyon invested in and built a 5.5kW hydroelectric scheme on the stream running through the farm with the aim of diversifying the business. Alex and Jolyon installed the facility in 2012 and have since generated 112,000kW of energy, some of which is exported to the grid. This output is sufficient to power their own energy needs, as well as up to four additional homes, allowing Jolyon and Alex to make savings on their electricity costs.

The Higgses have been farming together for over 35 years, and have a strong environmental ethos that is clear in many other areas of their business.

They are keen participants in agri-environmental activities and have planted trees to improve habitat connectivity for biodiversity and to store carbon. They are also focussed on the greenhouse gas emissions from their farming activity, seeking efficiencies in production as well as deploying the latest innovations in climate change mitigation, such as high sugar grasses.

Alex explained their motivation: "We see ourselves as custodians of the land, through aiding wildlife and trying to reduce carbon outputs we are leaving the land in a better condition for the next generation."

It is the aspiration of many farmers across Wales to produce energy and the couple strongly believe that there is further scope for more hydroelectricity production in Wales, using the nation's vast natural resource of hills, streams and high quantities of rainfall.

"Through green energy schemes such as our hydroelectric facility, planting trees and high sugar grasses, farmers like ourselves are actively supporting the vision of becoming a low carbon Wales."

Since 2012 Alex and Jolyon's hydro scheme has generated 112,000 kW of energy. The output is sufficient to power up to five homes



A RESILIENT WALES

NAME: Paul Williams

REGION: Llanwrst, Clwyd

SECTOR: Beef and sheep



Paul Williams is a fifth generation beef and sheep farmer working in the uplands of Llanwrst in the Snowdonia National Park.

15 years ago, as a result of change in climate and consistent heavy rain, rivers kept overtopping an embankment resulting in regular flooding of the town of Llanwrst and the village of Trefriw. Paul, along with other farmers and land owners on the floodplain, became involved in the Dyffryn Conwy Flood Alleviation Scheme, developed by the then Environment Agency. The scheme involved flood embankments being lowered at certain points in an attempt to increase the water storage capacity and temporary flooding of 200 acres of farmland adjacent to the River Conwy. This scheme has ensured that during high flows the water is now directed away from the more populated areas, such as Llanwrst and Trefriw, and homes have not been flooded since.

Paul is thankful that the scheme is successful and provides greater protection to people in the local town and village; however, there

are consequences for him and his business. In 2015, Paul experienced the distress of flooding when, as a result of a bow wave, 170 of his sheep were swept away, 70 of which were killed. He emphasised that there is little appreciation of the effects and consequences that flooding has on agricultural land, which is now becoming more frequent. Issues such as removal of debris, re-seeding, moving stock and the inconvenience of frequent flooding are issues that Paul now has to regularly deal with, as well as the degrading of the flooded land. Paul has now adapted his farming policy to adjust to the effects of the flood alleviation scheme, no longer grazing any stock on the land included in the scheme from November until February. This is a significant change as this is his best agricultural land.

Paul is one of a number of farmers in Wales involved in flood management schemes. Natural flood management actions deliver tangible benefits for communities as well as provide habitats for wildlife.

“As farmers we play a key role in protecting the town of Llanwrst and the village of Trefriw by allowing our land to be flooded and used to store water”

Natural flood management will become increasingly important in the future as a result of climate change and extreme weather events

A HEALTHIER WALES

Welsh farming makes a key contribution to the physical and mental well-being of the people of Wales and visitors from across the world.

Food is a basic necessity for us all and Welsh farmers - operating to the highest standards of production and welfare in the world - ensure access to high quality food that is affordable, safe, traceable and nutritious.

In addition, with over 80% of the land area of Wales farmed, farmers are key providers of the landscape and countryside upon which many access and recreational activities depend.

Welsh farming delivers a significant proportion of Wales' access provision which includes 16,000 miles of footpaths, 3,000 miles of bridleways, 1,200 miles of cycle network and 460,000 hectares of open access land. This provides access for the purpose of recreation and enjoyment to some of Wales' most spectacular areas. Providing this access contributes to the health and well-being of the people of Wales, as well as visitors now and in the future.

Our two case studies demonstrate the contribution that Welsh farmers make in both these key areas.

Welsh farming makes a key contribution to the physical and mental well-being of the people of Wales



16,000 MILES

There are 16,000 miles of public footpaths in Wales- Welsh farmers are key access providers



A HEALTHIER WALES

NAME: Cwmcerrig Farm Shop

REGION: Gorslas, Carmarthenshire

SECTOR: Sheep and poultry



The Watkins family have been farming at Cwmcerrig since the 1950s. Nearly 70 years, and three generations later, the family have gone on to develop and run a successful farm shop alongside the farm, attracting customers from all over West Wales and further afield.

In 2008 the family partnership spotted an opportunity to add value to what they produce and decided to expand their traditional farm business into Cwmcerrig Farm Shop. The family produce Welsh lamb, both pedigree and commercial, and poultry - including chickens, turkeys and geese - on a seasonal basis. These are all reared to high standards of animal welfare and slaughtered on farm in the on-site butchery, then retailed in the shop. Selling produce that has been reared on-farm is an important aspect of the business and ensures consumer confidence in the quality and traceability of the product. This top quality produce is also prepared and served in the on-site restaurant, providing excellent home cooked food.

The farm shop is run on the same site as the family farm, with animals

grazing in fields for customers to see, the family play a key role in educating and enhancing the understanding of the public as to where their food comes from. The shop employs 40 mainly local people, 23 of which are members of the Watkins family.

Aiming to stock Carmarthenshire produce, Cwmcerrig welcomes any new products made in Carmarthenshire, giving local businesses the opportunity to showcase their products and access to the market. Roland Watkins said: "We're all about food miles and we pride ourselves on selling the best of what Carmarthenshire and Wales has to offer. By backing local producers we are supporting local jobs and the local economy."

The high quality, nutritious food showcased at Cwmcerrig farm shop highlights the full range of excellent, safe and fully traceable food produced and grown in Wales by Welsh farmers operating to some of the highest standards of welfare and production in the world. This plays a fundamental role in supporting the physical and mental well-being of the people of Wales.

"I am proud to produce and sell high quality, sustainable food. Through the farm shop we promote great Carmarthenshire and Welsh food to the public."

Of the 1,500 product lines in Cwmcerrig Farm Shop, over 1,000 are Welsh and more than 600 are grown, reared or produced in Carmarthenshire



A HEALTHIER WALES

NAME: Wyn Williams

REGION: Llanfwrog, Anglesey

SECTOR: Beef and arable



Beef and arable farmer Wyn Williams farms on the Penrhyn Bay on the Anglesey coast. The Isle of Anglesey Coastal Path runs through the heart of his farm and through the farmyard. Wyn, a fourth generation farmer, runs 200 suckler cows and grows 50 acres of arable crops. He has been living and working on his farm for the past 35 years, where he also has four holiday cottages- easy access to the coastal path is a key draw for visitors staying on the site.

Farming around the coastal path, Wyn enjoys seeing both locals and tourists enjoying the route and the spectacular Welsh scenery. Wyn describes how people often stop to talk, asking questions about the farm, the animals and the local area. He said: "As farmers we have a lot of local knowledge, often this can enhance the quality of their visit."

Wyn said that in one week, for example, he saw visitors from all over

the world, including Denmark, Sweden and America, using and enjoying the coastal path, highlighting the path's role in attracting visitors to the island. He is encouraged that the path through his farm is used regularly and responsibly and that it provides a route for people to enjoy the outdoors, contributing to their health and well-being.

Farmers like Wyn are key providers of a significant proportion of access provision routes within Wales, including footpaths, bridleways, cycle networks and open access land. This key public good improves the physical and mental well-being of the people of Wales as well as underpinning Wales as a tourist destination, providing opportunities for people to see the beautiful scenery the Welsh countryside has to offer.

"As farmers we manage most of the land in Wales, providing access for members of the public and tourists to the countryside and green open space."

Wyn has 3,370 metres of the Isle of Anglesey Coastal Path running through the heart of his farm



A MORE EQUAL WALES

The Welsh agricultural industry underpins the rural economy and plays a pivotal role in contributing to a more equal Wales through direct and indirect employment.

Rural Wales is home to 33% of the population and we know that it can cost 10-20% more to achieve a basic standard of living in these rural areas.

Employment is key to preventing poverty and reducing inequality. The agricultural industry is critical for providing employment and business opportunities within rural areas. It is estimated that each family farm is economically linked to around 40-80 other businesses in the region.

The need for a dynamic Welsh agricultural industry is

typified by livestock markets throughout Wales. Markets are at the very heart of rural communities, bringing together and providing a hub of trade and business on market days. There is a hive of activity – farmers, auctioneers, café workers, hauliers and sales representatives all providing essential services to the agricultural industry, as well as valuable employment for rural communities. Market day also brings increased business to the local town. For generations markets have exemplified how farming delivers employment and economic growth in rural areas, reducing the risk of poverty and inequality for the people who live there.

Through direct and indirect employment in rural communities, Welsh farming underpins the rural economy and contributes to a more equal Wales

£

£7.40

For every pound invested in British farming the industry puts more than seven back into the UK economy



A MORE EQUAL WALES

NAME: Dolgellau Farmers' Mart

REGION: Dolgellau, Meirionnydd

SECTOR: Store cattle sale



In many rural communities across Wales, market day is an important day. It brings together farmers to trade, socialise and share local news - a tradition that has happened in rural Wales for many hundreds of years. A day at a local market provides the perfect snapshot of the importance of the agricultural industry in rural Welsh communities. Dolgellau Mart auctioneer Glyn Jarrett stresses the importance of the mart to the local businesses and farms, as well as its significance in maintaining the sense of community.

The mart in Dolgellau brings in farmers from many areas, such as Meirionnydd, west Montgomeryshire, the Llŷn Peninsula and Anglesey. It is a notable mart; in addition to the regular livestock auctions of prime and store stock the mart also hold seasonal Welsh Black Cattle Society and Welsh Mountain Sheep Society sales, which are nationally significant for these important native Welsh breeds.

As well as the 42 people employed at Dolgellau Mart throughout the year, there are numerous people whose employment is associated

with the market. From the staff in the bustling market café, representatives from Trading Standards and vets, to livestock hauliers, drovers and sales representatives from agricultural supply businesses, they all attend to do business in the hub that is the local market. Market days also result in businesses within Dolgellau town itself experiencing increased trade, such as the bank and the vets.

Dolgellau Mart is the main centre point for the agricultural businesses in this rural part of Wales. In 2016 the mart had a turnover of £15.1 million, this is the value of stock and items sold through the markets over the year. The additional business transacted on market days is immeasurable. It brings together quality stock that can then be presented to buyers who compete in an open market. It also provides an important focal and meeting point for many business owners who may work in remote and isolated areas of Wales.

The mart demonstrates the direct and indirect employment in rural communities, and how Welsh farming underpins the rural economy and contributes to a more equal Wales.

“Markets like this throughout Wales are bringing together the community, supporting local businesses, creating local jobs and benefitting the rural economy.”

During 2016 there were 1,191 vendors and 1,472 buyers at Dolgellau Mart



A WALES OF MORE COHESIVE COMMUNITIES

Welsh farmers make a key contribution towards the provision of attractive, viable, safe communities in rural areas. By their very nature, rural communities in Wales are small or in isolated locations. In these communities, it is often farmers and members of their family that support and facilitate many aspects of community life.

Many farmers or individuals involved with the agricultural industry undertake leadership and voluntary roles in rural communities which contribute to community cohesion. There will often be members of the agricultural industry sitting on Community Councils, PTAs or on the board of school governors. They also often assist with the smooth running of the community, from clearing roads when it has

snowed to arranging the local show. Local Young Farmers' Clubs bring young people in rural communities together, providing key life skills and social opportunities for young people- reducing any sense of rural isolation.

Financial prosperity is also an important aspect of cohesive communities; it enables communities to continue to thrive. Supply businesses directly linked with agriculture prosper and thrive within rural Wales. With farmers as their primary clientele, these businesses are reliant on a well-connected agricultural community, providing employment for local people. The agricultural industry is at the very heart of interconnected business networks and much of the community spirit on show in rural Wales.

Welsh farmers make a key contribution towards the provision of attractive, viable and safe communities in rural areas



£868 MILLION

Welsh farmers purchase a range of goods and services estimated at £868 million per annum



A WALES OF MORE COHESIVE COMMUNITIES

NAME: Rhodri Evans

REGION: Tregaron, Ceredigion

SECTOR: Beef and sheep



Rhodri Evans demonstrates that being active and supporting your rural community is often an intrinsic part of life in rural Wales. Rhodri has a keen sense of community spirit having been actively involved in various aspects of community life since the age of 11.

Rhodri is a seventh generation beef and sheep farmer living and working on the family farm with his wife and three young children. Aside from farming Rhodri is the County Councillor for the Llangeitho ward. His passion for public service started when he joined his local YFC at Llanddewi Brefi, serving in the capacity of treasurer, Vice Chairman and Chairman during this period. From there he became Chairman of Ceredigion YFC Federation and then went on to be elected Wales YFC Chairman in 2007. Whilst in YFC he was involved in community events such as local rallies and entertainment competitions. Rhodri also sat on the Emyr Jones

Parry Commission. As well as being a County Councillor Rhodri is also a Community Councillor for Llanddewi Brefi. He sits on the board of governors at numerous local schools, as well as being actively involved in the local show committee and the local hall committee. A recent addition to his local commitments includes training as a Community First Responder for his area.

Explaining his motivation to devote so much time to community life, he said it is something he has always done, like his parents before him. Rhodri identifies that involvement in the community is not unusual in the farming community. Farmers and the wider agricultural industry are often involved in community projects. Without farming many people would not be able to live and work in rural Wales, it provides a sense of community and a sense of belonging.

“Like many other farmers, I have been actively involved in community projects from a young age. It is important to keep the community together, encourage participation and keep rural communities strong.”

Rhodri has been involved in community projects since the age of 11 when he joined his local YFC

A WALES OF MORE COHESIVE COMMUNITIES

NAME: Dalton's ATVs

REGION: Lampeter, Ceredigion

SECTOR: Beef and sheep



John Dalton runs a family business, Dalton's ATVs. It is one of the largest authorised dealers of specific models of all-terrain vehicles in the UK, selling and repairing ATVs.

John explained that around 95% of his business comes from farmers, highlighting the importance of the industry in supporting the rural economy. Through his efforts employing 18 individuals from local communities at his ATV business - as well as two at home on the farm - John offers skilled employment in a rural community, making a significant contribution to a viable and cohesive community. This is an aspect he is particularly proud of, recognising that access to employment is central to keeping young people in our rural communities, where such opportunities for skilled employment can be at a premium.

This local employment provides benefits to John's business too. He emphasised that living in rural communities helps provide the

background and understanding of the industry and the needs of his customers. Also having a local team who know each other and socialise together provides a connected workforce. As well as selling and repairing ATVs on his Talsarn site, John and his employees visit farms across Wales, having a customer base stretching from the Gower to Trawsfynydd. He also attends local markets such as Dolgellau Mart to encourage direct contact with his customers and demonstrates how many businesses in rural Wales play an active role in the community.

The agricultural industry underpins the sense of community in rural areas, seen through close friendships and business bonds built over many years. John is clear in his understanding that his business wouldn't survive without farmers. He is one of many businesses in rural Wales that are almost wholly reliant on the agricultural community, as are his workforce and the communities they live in.

"The farming community are the core customers for my business. The agricultural industry is the foundation for many aspects of rural life, from supporting businesses to providing employment; the industry is crucial to rural Wales."

Around 95% of John's business comes from the agricultural community

A WALES OF VIBRANT CULTURE AND WELSH LANGUAGE

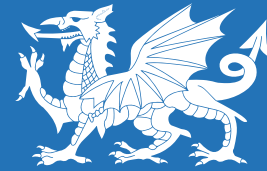
Welsh farmers are key promoters and protectors of the culture, heritage and language of Wales. The farming sector makes an essential contribution to the preservation of the Welsh language, with the agricultural industry having the highest proportion of Welsh speakers of any sector. Farming is also the bedrock of rural communities across Wales which have been shaped by farming activity spanning hundreds of years. As farmers in Wales continue to maintain the Welsh landscape, they also continue to maintain cultural traditions, preserving our heritage and sense of place for future generations.

The culture of music, singing and choirs are emblematic to Wales - giving people a sense of purpose, identity and

belonging. A strong cultural heritage allows Wales to shine on the world wide stage and is at the heart of the Welsh brand.

There is no stronger cultural representation of Wales than a male voice choir. Many of these groups feature a strong Welsh-speaking representation from the farming community, keeping the traditions of Wales vibrant and strong while also preserving the country's culture and heritage for the next generation. This factor, combined with the use of the Welsh language within the industry, both in the work place and on a social level, highlights the significant contribution of Welsh farming to a Wales of vibrant culture and thriving Welsh language.

Welsh farmers are key promoters and protectors of our culture, heritage and the Welsh language



29.5%

The Welsh agricultural industry has the highest proportion of Welsh speakers, more than any other sector

A WALES OF VIBRANT CULTURE AND WELSH LANGUAGE

NAME: Côr Meibion Machynlleth

REGION: Machynlleth, Montgomeryshire



The farming community promotes and protects culture, heritage and the Welsh language in Wales and this is exemplified perfectly by Côr Meibion Machynlleth, a male voice choir predominantly made up of farmers from the local area.

Of the 46 members of the choir over 65% are farmers, with the majority of the others either farmers' sons or in occupations that rely on the agricultural industry for business. Being in a predominantly agricultural area, where the use of the Welsh language is strong, the group joined with the aim to create a social group in a rural area. The choir provides an opportunity to support the community in providing local cultural activities, as well as a chance to socialise through the medium of Welsh.

The choir draws in local men, mainly from the Dyfi Valley and Aberystwth, across a range of ages. The youngest member of the choir is 22-years-old and the eldest is 65. Two sets of father and sons participate, as well as members of extended families.

Though being a relatively new choir forming in 2014 in order to compete in the National Eisteddfod - an aim they aspire to annually - the group have performed across Wales, including competing in the S4C competition Côr Cymru and singing at events to raise money for local charities, as well as at the local music festival.

This choir is a prime example of the strong sense of culture, heritage and tradition felt in much of rural Wales and preserved by members of the agricultural sector. It is one of many choirs across Wales that bring individuals from the farming community together.

“Being part of the choir enables us to come together and promote and retain a key part of the Welsh culture; a male voice choir. It also provides an opportunity to socialise through the medium of Welsh.”

Over 90% of the choir's members are linked with Welsh agriculture



A WALES OF VIBRANT CULTURE AND WELSH LANGUAGE

NAMES: Gareth and Sharon Richards

REGION: Abergwili, Carmarthenshire

SECTOR: Dairy



Gareth and Sharon Richards run their family dairy farm, Alltyfyrdin, in Abergwili in Carmarthenshire. Alongside the farm, the couple run a heritage centre, milking viewing parlour and display a collection of wool from their flock of pedigree Jacob sheep.

Located on the farm is Merlin's Hill where, according to legend, Merlin the wizard is kept in bonds of enchantment. The heritage centre developed as the couple were receiving large numbers of visitors wanting to walk up Merlin's Hill, learn about the legend and about the farm. Visitors can walk the nature trails from the farmyard to the hilltop site of an Iron Age Hillfort.

The heritage centre is run above the milking parlour, and has information on the history of the area, farming and where food comes from, animal breeds, traditional crafts and much more. Sharon leads groups of school children and community groups through the heritage centre, and

Gareth shows them aspects of the working farm. Both enjoy sharing their knowledge about local culture, history and farming with children and people of all ages.

As well as running the 50 strong Holstein dairy herd and 120 pedigree Jacob sheep, the heritage centre and the farm house B & B, the couple have also developed a wool collection made from their flock. Here they use a local woollen mill in the Teifi Valley, adopting traditional methods to produce top quality blankets, cushions and scarves. It is another way the family are keeping traditions alive.

Both Gareth and Sharon are Welsh speakers and use the language when conducting business and socialising. The couple place an emphasis on providing information bilingually and say the Welsh language is an important aspect of the history of Wales.

The duo take pride in their culture and traditions and pass it onto the next generation.

"As farmers we understand the importance of teaching the next generation about Welsh culture, language, traditions and farming."

The on-farm heritage centre welcomes children of all ages to learn about food, farming and the legend of Merlin



A GLOBALLY RESPONSIBLE WALES

In the global context, food security, maintaining and preserving our agricultural land and productive capacity in Wales is an ecosystem service that should be safeguarded. A globally responsible Wales should not export impacts of food production to other parts of the world where environmental standards are lower. In the future our global food production system will be increasingly challenged as the impact of climate change increases. As the UK and global population grows, there will be more competition for land, water and energy and increasing demand for high quality diets.

As a result, Wales is set to become an area favoured for agricultural production with an increasingly important role in securing food supplies for our nation and providing

consumers with access to high quality, nutritious, affordable food.

The agricultural industry is ready to step up to the challenge of producing food for a growing population by optimising the use of inputs and minimising the impact on the environment – in short - producing more and impacting less. Welsh farmers are already adapting their businesses by reducing reliance on imported feeds and maximising output from grass-based systems supplemented with home grown forage crops, thereby reducing the ecological footprint of their production systems.

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.

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



60%

more food would need to be produced globally by 2050

A GLOBALLY RESPONSIBLE WALES

NAME: Rob Powell

REGION: Builth Wells, Brecon and Radnor

SECTOR: Sheep



At a time of growing global environmental awareness, farmers in Wales are increasingly clear of their role in contributing to a globally responsible Wales.

Breconshire hill farmer Rob Powell farms with his wife and two young sons Alun and Aron across two holdings outside Builth Wells. Farming 2,500 sheep, mainly the Brecknock Hill Cheviot and Epynt Hardy Speckle ewes, Rob's focus is to produce high quality meat, optimising production off grass.

This is achieved through a combination of sheep breeding and improvements to self-sufficiency. Year-on-year Rob strives to improve his farming system by reducing reliance on bought in feeds, utilising the latest in grass varieties and increasing the range of cropping on his farm.

Rob explains that a key principle is to produce more from less. He achieves this by maximising sheep production off grass - the natural resource abundant on most Welsh farms. Working with the environment through rotational grazing and optimising grass utilisation, Rob feeds his sheep crops grown on the farm such as swedes, red clover and turnips, alongside grass, hugely reducing the farm's reliance on bought in concentrate feeds.

This increasing awareness of the opportunities presented through maximising output from a grass based system has a positive global impact, reducing reliance on imported feed from across the world. Welsh farmers also have a key role to play feeding the people of Wales and in contributing to global food security now and in the years to come.

“My focus as a farmer is producing good quality meat through optimising grassland management and improving self-sufficiency to reduce reliance on imported goods.”

Due to our climate and rainfall Wales will be a favoured place for production in the future



Well-being goal	Contribution of agriculture
A prosperous Wales	<ul style="list-style-type: none"> • 58,300 employed full or part time in farming in Wales • Welsh agriculture has a gross output of around £1.5bn • Farming underpins a food supply chain worth over £6bn • Over 223,000 people in Wales are employed in the agri-food sectors –Wales’ biggest employer • The Welsh countryside, managed by farmers, provides the backdrop for the tourism industry worth over £2.8bn
A resilient Wales	<ul style="list-style-type: none"> • Farmers care for over 80% of the land area of Wales – that’s over 1.84m hectares • 676,000 hectares 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 storage, water quality and flood alleviation • Low carbon, local energy installations have the potential to meet 57% of Wales’ electricity consumption, a large proportion of projects are located within Wales’ rural local authorities • GHG emissions from agriculture have declined by 20% since 1990 and further decreases are being achieved through production efficiency measures
A healthier Wales	<ul style="list-style-type: none"> • 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’ access provision which includes 16,000 miles of footpaths, 3,000 miles of bridleways, 1,200 miles of cycle network, and 460,000 hectares of open access land
A more equal Wales	<ul style="list-style-type: none"> • Rural Wales is home to 33% of the Welsh population • The vitality and potential of rural areas is closely linked to the presence of a competitive and dynamic farming sector. Each family farm is typically economically linked to some 40-80 other businesses in the region
A Wales of cohesive communities	<ul style="list-style-type: none"> • Local communities in rural Wales are heavily dependent on agriculture for financial and social prosperity • Members of the farming sector undertake leadership and voluntary roles in rural communities
A Wales of vibrant culture and thriving Welsh language	<ul style="list-style-type: none"> • 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
A globally responsible Wales	<ul style="list-style-type: none"> • 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

CONCLUSION

As this document highlights and each individual case study shows, farming does and will continue to provide for the future generations of Wales. There can be no doubt that, more than any other sector, the agricultural industry and its associated supply chain strongly deliver each of the seven well-being goals.

It is first and foremost important to note farmer's role as food producers for the nation, supporting the country's largest manufacturing sector, the food and drink industry, and providing high quality food produced to world leading standards. Farmers manage over 80% of the land in Wales, and caring for the land and improving it for the next generation is a common motivation throughout the industry. Environmental programmes, green energy projects and flood alleviation schemes are just three examples of the hard work carried out by Welsh farmers to maintain the nation's world class landscape. This management of the countryside also contributes to Wales' tourism sector, providing the backdrop for the industry. The employment generated by farming and the agricultural supply chain is significant in rural Wales, supporting local economies and keeping many communities alive, helping ensure there are opportunities for the next generation. At the heart of all communities in rural Wales are members of the farming sector, either through undertaking voluntary

roles or supporting community projects. Furthermore, within the industry the Welsh language is regularly used, having the highest proportion of Welsh speakers, more than any other sector. These factors highlight how Welsh farmers are key promoters and protectors of Welsh culture, heritage and language.

As each of the case studies demonstrate, the contribution of farming to the well-being of Wales now and in the future is significant. The passion and drive demonstrated by these 14 farming families is just a small snapshot of our wonderful industry. These examples do not occur in isolation- farmers across Wales do good work and are contributing to the economic, environmental, social and cultural well-being of Wales on many levels. Farming is part of Wales' history and will continue to be a significant driver in the future. There can be no doubt that this very significant contribution will only continue to be delivered if we have viable and profitable farming enterprises and a strong, competitive agricultural industry in Wales. Moving forward, it is clear that society needs farming to thrive and it is incumbent on us all to work together through the Well-being of Future Generations Act to put in place the framework that allows farm businesses to be profitable so they can continue to deliver for the people of Wales now and in the future.

