

A Vision for Welsh

UPLAND FARMING





President's foreword

JOHN DAVIES

Welsh farming is operating in a period of profound uncertainty. Following the decision to leave the European Union in 2016, significant uncertainty surrounds the nature of our future trading relationship with the EU and how our Westminster Government wishes to position itself as an independent trading nation.

In Wales, ambiguity exists about the shape of the future farming policy as we leave the Common Agricultural Policy (CAP) and what this will mean in practice for farm businesses across Wales.

These uncertainties have been exacerbated by the public health and economic challenges of the global Coronavirus pandemic which has tested the resilience of our food supply chains. This must also be considered alongside the longer-term challenge of climate change and rising environmental awareness.

Against this backdrop, we are seeing much greater focus on how we manage our land in Wales. Nowhere in Wales is this focus more acute than in the uplands where future land use is increasingly contested.

Those of us who farm in the uplands of Wales know the multiple economic, environmental, social and cultural benefits our activities derive, not least the production of high quality food to world leading standards. We recognise, as upland farmers, that we are well placed to deliver a broad range of environmental outcomes for society, however, these objectives can only be achieved if our businesses are economically sustainable. The need for farming to continue to sustain our rural communities, heritage, culture and language cannot be overstated.

At this pivotal time, we strongly believe that the people who live and work in the Welsh uplands should be involved in shaping its future. The NFU Cymru Vision for Welsh Upland Farming survey, the culmination of which is this report, has provided upland farmers with this opportunity.

I would like to extend my thanks to all of you who took the time to contribute your valuable insight to this work. I am particularly grateful to the respondents who highlighted the important issue of farmers' health and well-being, reminding us all, in these uncertain times, of the need to take care of ourselves and of each other. As NFU Cymru President I want to reassure you that the challenges we face, we face together.

At NFU Cymru we will do all we can to secure the pathway to a productive, profitable and progressive future for the Welsh farming industry and all the benefits it delivers.

John Davies

President, NFU Cymru

An introduction from
NFU Cymru LFA Board Chair

KATH WHITROW

From the summit of Snowdon to Penylan in the Brecon Beacons, to the hills of the Clwydian Range to the Preseli Mountains in Pembrokeshire, some of Wales' most treasured and iconic landscapes have been shaped and maintained by upland farming over centuries

Some 80% of Welsh farmland is designated Less Favoured Area (LFA). Dispersed across every county, the Welsh uplands are characterised by their stunning landscapes, the production of high-quality PGI Welsh Beef and Lamb, our native breeds and traditional farming systems. The challenging climate and terrain limits the range of products from these areas. Their remoteness means they are isolated from markets, with infrastructure and services logistically more difficult.

However, the Welsh uplands are strategically important to Wales. Not only for their iconic landscapes, but for the environmental services they provide such as clean water and carbon storage alongside their important ecology, and for the communities, heritage and culture they support.

Welsh upland farming systems are also intrinsically linked with lowland farming systems: a symbiotic relationship exists with the movement of breeding and store stock to the lowlands and vice versa supplementary feed and fodder.

Active farming is essential for maintaining the fabric of the Welsh uplands and the continued provision of all of these benefits. These landscapes are living, working, and dynamic and the ongoing management of them is only possible if it is economically sustainable and there are people there to work the land.

In recent years, despite their extent and significance, we have seen upland farming policy de-emphasised. As our relationship with the EU changes, the economic rationale for upland livestock production is threatened. Global environmental challenges, such as climate change and biodiversity decline, are viewed by some as drivers for land use change without any consideration of the wider impacts.

At this pivotal time for Welsh farming as we transition out of the CAP and into a new 'made in Wales' agricultural policy, the NFU Cymru LFA Board wants to ensure that the voice of Welsh upland farming is clearly heard in this debate. This is a

message that has resonated strongly with Welsh upland farmers and, despite the limitations placed on us as a result of Covid-19, the voice of Welsh farmers across Wales has been clearly heard with our survey attracting a fantastic number of responses.

Upland farmers have reminded us of the unique contribution they make to their rural communities and the landscapes and environment they care so deeply for. They have entrusted us with their worries and concerns for the future, also providing a valuable insight into what, they believe, is needed in terms of a policy framework moving forward.

The findings of the NFU Cymru Vision for Welsh Upland Farming survey are summarised in this report. May I take this opportunity to thank the NFU Cymru LFA Board for advancing this important work within their respective counties. I am delighted with the strength and depth of the response which will be pivotal to the work of the NFU Cymru LFA Board going forward.



The Welsh uplands

The Welsh uplands are strategically important to Wales. These iconic places are living, working, dynamic landscapes with livestock farming, which has sustained our remote upland communities for centuries, at its heart.

80% of Welsh agricultural land is classified as Less Favoured Area (LFA) - reflecting the topography and climatic conditions that can limit farming options.

Livestock farming is the predominant economic activity in these areas, with farmers in the LFA

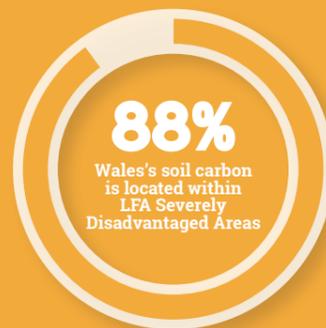
also providing a unique range of goods and services for society. Welsh upland farming has also shaped and provides the ongoing management and maintenance of iconic Welsh landscapes which supports a diverse array of species and habitats and provides a range of ecosystem services such as water and carbon storage upon which we all depend.

Inherent to the social fabric of some of Wales's remotest areas, Welsh upland farming provides direct and indirect employment. Direct employment in farming is up to 28% in some rural areas and the farming

industry also provides indirect employment through agricultural suppliers, contractors and the broad range of businesses that farmers trade with. Other sources of rural employment such as tourism are deeply entwined.

Welsh upland farming is culturally significant, providing a stronghold for the Welsh language, our native breeds of livestock as well a range of traditional skills such as hedging and dry-stone walling which are characteristic of Welsh farmed landscapes and combine to provide a unique 'sense of place'.

The Welsh Uplands: Key Stats



Developing a Vision for Welsh Upland Farming - Our Approach

NFU Cymru has engaged with farmers on the development of a Vision for Welsh Upland Farming. This research aimed to promote the crucial role of upland farming to the economic, environmental, social and cultural well-being of Wales; to understand the concerns and worries for the future of upland farmers and to identify the key asks of policymakers to deliver a productive, profitable and progressive future for Welsh upland farming moving forward.

The development of this vision was informed by a NFU Cymru survey which was included in the September issue of our magazine Farming Wales and was available bilingually online on the NFU Cymru website between August and October 2020.

Basic information about respondents and their businesses was also captured through the survey, which primarily asked multiple choice questions and a smaller number of open ended questions to understand actions to improve the environment; broader economic, environmental, social and cultural contribution; preparation for Brexit; threats to Welsh upland farming and key asks of Welsh Government. This approach greatly enhanced the quality of responses and enabled a deeper understanding to be developed. The report is enriched and 'brought to life' by the inclusion of four upland farming case studies from across Wales.

Responses to the survey were received from 765 farmers making this the largest self-selecting survey ever undertaken by NFU Cymru. Responses were received from every county across Wales reflecting the fact that every county has at least some LFA land.

This report presents a summary of the key findings of this research and includes a number of recommendations on the way forward.

NFU Cymru Vision for Welsh Upland Farming - Key stats

- **765** responses were received
- Almost **25%** of respondents to the survey were aged 40 and under. Almost half were aged between 41 and 60 and just over one quarter were over 61 years old.
- Over half of respondents were **beef and sheep farmers**, a third farmed sheep only.
- Nearly half of respondents were **tenant farmers** on some or all of their land
- **42%** of respondents had rights to graze common land
- In terms of farm size, approximately one third farmed an area less than **100ha**; one third farmed between **101-200ha** and a further third farmed greater than **201ha**.

The contribution of Welsh upland farming

The survey sought to understand the economic, environmental, social and cultural contribution of farming to upland areas. Farmers were asked to rate their multiple roles from very important to not important at all:

- 99% of respondents felt that looking after the land and landscape was either very or fairly important
- 96% felt their role as a food producer was either very important or fairly important
- 96% believed that operating a rural business was either very or fairly important
- 89% believing it was very (55%) or fairly important (34%) part of their role to deliver additional environmental benefits
- 88% said it was very or fairly important for them to be a rural employer
- 85% told us it was very or fairly important for them to be custodians of Welsh heritage & culture

The upland farming economy

The survey highlights the economic importance of upland farming.

- Almost 40% of respondents had an annual turnover between £76k-£250k
- 70% of respondents directly employed between one and five people
- One third of respondents indicated they support or buy from between 21 and 50 other businesses; with one in ten respondents indicating they support or buy from 51 or more businesses

In terms of farm viability:

- 95% of farmers surveyed identified that food production and sales were either very important or fairly important
- 91% of respondents identified direct financial support (e.g. BPS) was very or fairly important
- Just under two thirds of farmers surveyed identified that Glastir was very important or fairly important
- Two thirds of farmers identified that grants (such as the Sustainable Production Grant and Farm Business Grant) were very or fairly important
- 52% of respondents identified off-farm employment was very or fairly important
- Diversified income was viewed as very or fairly important in just over half of respondents



THE DAVIES FAMILY

The Davies family farm in the Gwaun valley in the Preseli hills, Pembrokeshire. The sheep farm provides a living for three generations, Vivian, who has lived at the farm for 75 years works alongside his son Hedd and grandsons Llyr, 22 and Gethin aged 20. The family work well together, with all agreeing that it is nice to work alongside family.

Pembrokeshire

The family came to the farm in the 1940's, and the business has developed over time. Until 15 years ago the family were milking cows as well as rearing sheep. Now, they lamb 1100 ewes and buy around 900 store lambs locally, which are grazed over 340 acres of grassland pasture.

The yard sits at 900ft, with the land at the highest point rising to 1000ft. Vivian commented "On a clear day

you can see Ireland in one direction and the Snowdonia mountains in the other". Working the land in this corner of Wales means that the weather, at times, can be an issue. "We have long winters; the grazing season is short" said Hedd.

Away from the farm, Hedd runs a sheep scanning business that keeps him busy during the winter months, scanning around 40,000

ewes each year. Both Gethin and Llyr spend the summer shearing, last year shearing around 22,000 sheep between them. This helps provide additional income and support the farm. Hedd commented "For many, this has become the modern way of farming, you have got to diversify and have an additional income alongside the farm."

The family are anticipating the

direction of the future of agricultural policy, Hedd commented "The big challenge will be to learn to farm without the Single Farm Payment. With two young boys at home wanting to follow in our footsteps, it is important that government get it right. The main thing we want to see is a fair price for the food we produce."

Both Llyr and Gethin see their future in the agriculture industry. As one of the youngest Davies' to farm the land, Llyr is optimistic about the future. "We have to take it as it comes. We have learnt to overcome challenges, working the land as best we can".

The farm supports local businesses with the money that comes into the farm going back into the local economy. The local community is also very important, as well as the language. Vivian commented "Welsh is the main language spoken in the agricultural community here. It is spoken generation after generation, there is continuity, and that is vital."



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I see my role as a farmer as a mixture of components. To produce quality lamb, maintain the landscape and keeping the language alive. That is why farming is important."

- Llyr Davies



70%

of respondents directly employ between one and five people



40%

of respondents had an annual turnover between £76k and £250k



Diversification in the uplands

Through the survey, information was gathered on farm diversification. 43% of respondents indicated they operated a diversified non-farming element to their business. Amongst those that operate diversified businesses:

- 43% had diversified into renewable energy
- 42% had visitor accommodation
- 10% added value to products through direct sales
- 9% ran a forestry operation

Farmers were asked to consider the extent to which a range of factors were a barrier to diversification or diversifying further. The three biggest barriers identified by those surveyed were:

- Financial resources (70%)
- Planning issues (66%)
- Having the time (63%)

Less respondents identified skills and knowledge (30%), carrying out market research (27%) and accessing advice and support (24%) as significant or fairly significant barriers.



EMLYN ROBERTS

Meirionnydd

Emlyn Roberts works hard, making the best of his environment at the family's 450-hectare hill farm near Dolgellau. He is the fourth generation of his family to farm the land since 1913. Farming in partnership with his parents, Emlyn lives at the farm with his wife and two children

With around 350 hectares at height - between 1,400-3,000ft, Emlyn describes the farm as 'top-heavy'. Farming this landscape isn't without its challenges, though it is all Emlyn has ever known. A core policy of the business is to stock the farm with livestock bred to thrive in the unforgiving terrain - Welsh Mountain ewes and Welsh Black cattle. Emlyn says: "Our aim is to keep the cows and ewes hardy. It is much more efficient to keep an animal that naturally thrives in its environment." Grazing the Aran Fawddwy mountain, the ewes are on the mountain for most of the year, except for about six weeks around lambing. Most breeding flocks and herds in Wales originate from the uplands, this, in Emlyn's opinion, is part of why the Welsh uplands are so important.

Emlyn follows the philosophy that it is easier to work with the environment than go against it, so, for 27 years the farm has participated in environmental schemes. This has had a positive impact, not least with the return of some grouse to the heather uplands and the management of some unique flowering hay meadows. It has also facilitated the renovation of traditional field boundaries, including the rebuilding of stone walls and the planting of hedges in areas of land that are challenging to farm.

Renewable energy is an important diversification for the business, providing a long-term income to supplement the family's beef and sheep enterprise. High volumes of

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The Welsh uplands and hills are a little different. We're a very hardy bunch and do our very best survive, but we're facing some huge challenges."

- Emlyn Roberts

rainfall are part and parcel of farming at nearly 3,000 feet so, rather than resist the elements, the family installed a 350kW river hydro energy generation scheme. There is also a biomass boiler for heating the farmhouse and a couple of small solar panel systems.

Emlyn's son Dafydd, who studied agriculture, has returned to the farm. Emlyn commented "It is vital for the future generations that any new support scheme provides stability to counteract the bumps in the road ahead. It is important that the government listen to what the people who work in the uplands have to say. We know the land best and we will ultimately have to live with the consequences of these decisions."



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The people who work in the countryside maintain families, businesses and communities. They maintain the Welsh language.

- Emlyn Roberts



43%

of respondents operate a diversified non-farming business



43%

of respondents who had diversified had renewables

The upland environment

In terms of the management of the upland environment, over half (54%) of respondents indicated they were Glastir agri-environment scheme participants .

Over 80% of farmers surveyed indicated they had undertaken one or more activities to improve the environment in the last 10 years describing almost 70 different environmental actions. This included work to establish, restore or manage hedgerows alongside tree planting, woodland management, habitat management and creation.

In addition, a range of further actions to address climate change were referred to ranging from renewables to enhancing carbon sequestration on-farm

through managing peatland and other carbon stores. Respondents also referred to actions to reduce the carbon impact of their farming systems, such as reducing finishing times, improved genetics, efficient use of inputs such as feed, fertiliser and fuel and selling local to reduce food miles.

There were also actions to improve water quality, including creation of riparian corridors, improvements to farm infrastructure including storage, work on gateways, the creation of farm tracks and hardstanding feeding areas and culverts, as well as the establishment and management of ponds, nutrient management planning and precision application of nutrients.

A number of respondents referred to changes in grazing regimes, grazing with cattle and the use of native breeds to manage upland habitats. A range of habitats were managed and created, for example, the use of pollinator and bird seed mixes.

41% of respondents indicated they had altered their business to participate in agri-environment schemes. Those who had changed their businesses to secure an agri-environment scheme contract felt they were more likely to see positive impact or no impact in terms of the amount of capital available for farm investment, number of rural businesses supported or number of people employed than a negative impact.



EDWIN NOBLE

Mid Gwynedd

In the hills of Snowdonia, Edwin Noble is the third generation to farm the land. In partnership with his son William, they farm around a thousand mainly Welsh Mountain sheep and 30 head of breeding cattle

With the farmyard sitting at around 550ft, the land rises to 2,200ft at the highest point, with views of the summit of Snowdon visible on a clear day. Edwin commented "there is something quite nice about going up to the mountain and seeing the sheep grazing freely."

It is an area of very high rainfall, so a lot of land is acid grassland. Much of it growing on peat, meaning the farm cannot sustain high stocking rates. "Farms like this are very marginal, there aren't that many options of what we can farm."

Working in partnership with the landscape, Edwin and his son produce top quality light lambs. The farm has been involved in a number of conservation agreements since the early 2000s, and as a result, the ewe numbers have decreased over the years in accordance with the agreements. This has resulted in the lambs being slightly heavier, with Edwin aiming to have most of his lambs over 30kg. Edwin notes that the main challenges of farming for him are usually weather or policy related.

"As a farmer I want to produce food and to farm profitably. I do have some concerns about the future policy direction and the focus moving away from farmers

producing food. There must be a balance between the environment and food production. Without this, marginal hill farms as we know them may disappear."

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It would be a terrible shame if there were no sheep on these mountains, they make the mountains look as they do. The sheep are an integral part of Snowdonia."

- Edwin Noble

He continues: "I would like the Welsh uplands to become a place where the next generation can farm profitably. I do worry that there are youngsters leaving our rural uplands to find work, and once they go, they often don't come back. The uplands are a nice place to live, I like being part of a small community, but we must ensure that they are alive and sustainable for the generations after us."



54%

of respondents
in Glastir



70

different environmental
actions described
by respondents

The upland farming community

With settlements remote and dispersed, upland communities are traditionally tightknit and self-reliant. 83% of those surveyed were involved in one or more voluntary activities within their community. 60% of respondents were involved with local shows, 44% were involved with the young farmers movement; 35% were involved in the local church/chapel and 33% with the village hall. 22% had involvement with the community council.

In addition a wide range of other activities was described by respondents including:

- Supporting the local school
- Hosting educational visits for schools, colleges and universities
- The provision of public access
- Arranging charity events
- Belonging to mountain rescue
- Supporting the community in extreme weather such as the clearing of snow, fallen branches
- Looking after neighbours

Many respondents referred to maintaining the landscape/countryside and providing this service for free for the enjoyment of others. Some respondents highlighted the continuation of farming traditions and traditional native breeds. The Welsh language was also highlighted as being of importance and 85% of farmers surveyed had a degree of proficiency in the Welsh language, with more than half of respondents fluent.



JOHN & BERYL VAUGHAN

John and Beryl Vaughan run a beef and sheep farm in partnership with their son Edward near the village of Llanerfyl, mid Wales. The farm ranges from 750ft to 1,200ft and has been in the family for a multitude of generations

Montgomeryshire

John commented: "In the uplands there have always been strong communities and a feeling of belonging to the area. Many upland farmers feel a tie to both the land and the community. Often farmers born in the Welsh uplands stay in the Welsh uplands so we have strong roots, that means a lot to us."

For over 35 years John and

Beryl have been involved in all aspects of community life, from supporting the Royal Welsh Show, the National Eisteddfod, Merched y Wawr, being a school governor, supporting the local chapel, to name but a few. Beryl has raised money for many local, regional and national charities and John has been a local magistrate for over 30 years. They are clear that in many areas of Wales, farmers form the

foundation of community life.

With Welsh being the prominent language of the farming community in the area, Beryl commented: "Language, heritage, the history of our ancestors, it is all so important. We are the backbone of the community, if we don't preserve and promote our heritage and culture then who will? It is vital that we pass it

onto our children.”

As well as supporting rural communities John is clear that farming is vital to rural economies. “The uplands make up much of rural Wales. Without a vibrant agriculture industry in the hills, we will lose the communities that live there.” John highlighted that there is a network of people and businesses involved in the running of a hill farm, from contractors to agricultural merchants. “It is remarkable how many local businesses hill farmers use. The money we earn doesn’t stay on the farm but is spread out, keeping the local economy going and creating employment.”



83%

of respondents were involved in one or more voluntary activities



53%

More than half of respondents spoke Welsh fluently



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Language, community, culture, heritage and the Welsh uplands are totally interlinked.

- Beryl Vaughan

Threats to farming in the Welsh uplands

With Welsh farming operating in a changing context, the research sought to understand farmer perspectives on future threats.

In the context of Brexit, just over one quarter (27%) of Welsh farmers surveyed indicated they had made changes in preparation for Brexit. Those respondents who had made changes referred to alterations to farming systems such as changing sheep breeds, increasing lambing percentage, reducing or increasing cow numbers or reducing or increasing sheep numbers.

Others indicated they had made efforts to understand their cost of production, reduce levels of borrowing, cut costs, reduce inputs and stopped investing. Some respondents indicated they had sought to add value to products, increase levels of self-sufficiency through grass-based systems and rotational grazing. Some farmers had pursued diversification activities including pigs, poultry, dairy, heifer rearing as well as renewables, tourism and securing more

off-farm employment.

In terms of future threats to upland farming, respondents identified farm business profitability (85%), future trade deals (84%) and future policy (80%) as the most significant threats. Two thirds of farmers surveyed identified that land use change (67%) and regulation (65%) were also significant threats. Half of respondents identified that a lack of rural infrastructure was a significant threat.

A broad range of responses were received regarding other potential threats. Some respondents identified threats to critical mass in the processing sector.

Others identified the threat to upland farming from new forestry planting, rewilding, species reintroduction, invasive species and bracken encroachment. The off-setting agendas of big corporations and environmental organisations buying up Welsh farms were also referred to. Some respondents were concerned over the breakdown

of upland communities as a result of the inability to provide sustainable incomes for the next generation, with an aging farming workforce and lack of support and infrastructure to attract young people.

A lack of understanding between farmers and policymakers 'in Cardiff' was also highlighted, with concerns that future policy won't reflect the needs of Welsh upland farming as a result.

Respondents observed increasing levels of anti-social behaviour in the countryside, some associated with ever-increasing levels of recreational access, with specific concerns such as dog worrying, fly-tipping, wild camping and rural crime.

A number of respondents were concerned about animal health and welfare and referred to bovine TB, sheep scab and ticks. Risks associated with a changing climate, including wildfires through under-grazing, were also identified.

Future policy for Welsh upland farming

Farmers were asked for their views on future policy. Welsh Government proposes the Sustainable Farming Scheme to replace the CAP. This will be based on the Sustainable Farming Payment for the delivery of actions that deliver environmental outcomes together with Business Support which will focus on advice, capital investment and skills development.

Farmers were asked to rate the Sustainable Farming Scheme proposals in terms of addressing the specific needs of upland farming. Just 18% rated proposals as very good or fairly good with more than double that figure, 37% rating the Sustainable Farming Scheme as poor or very poor.

Farmers were asked how important it was to include a range of measures in future Welsh farming policy:

- **98% of respondents felt it was either very important or fairly important that future farming policy included measures to ensure farmers can make a reasonable living**
- **A similar proportion felt there should be measures to underpin food production and ensure consumers have a stable supply of affordable food**
- **96% of respondents felt measures to deliver vibrant rural communities were very or fairly important**
- **94% stated they felt that measures to maintain rural landscapes were very or fairly important**
- **91% of respondents indicated that measures to address volatility were very or fairly important**
- **89% indicated that measures to make farming more productive were very or fairly important**
- **85% viewed measures to deliver environmental outcomes; and**
- **83% viewed measures to tackle climate change as very or fairly important**

A diverse range of responses was received to the 'top ask' of Welsh Government for Welsh upland farming. Most popular amongst them was the need for the continuation of BPS or some form of baseline support to provide stability to farm businesses.

Many respondents identified the need for a greater balance between environmental, food production, productivity and broader objectives. There were also calls for policies to support young people and equal access to the scheme for tenant farmers and farmers with common land.

Farmers also asked Welsh Government to listen to them more through the process of scheme design with more value placed on 'what is already there' and a greater understanding of upland farming systems needed. Respondents identified the need for practical policies and a less prescriptive approach, less red tape and regulation with the fear of inspection clearly a strain on farmers.

Others emphasised the future scheme must not result in a 'postcode lottery' of support which many have experienced through the current Glastir approach and a much-reduced focus on the need for experts, consultants and advisers.

Other respondents took the opportunity to ask Welsh Government to recognise the wider benefits delivered by farmers, including our iconic Welsh landscapes, rural employment, Welsh language and culture, as well as the need to ensure a basic level of income in rural areas if the industry is to be attractive to the next generation.

Concerns about land use change were reflected in asks to prevent rewilding, species re-introductions and large-scale afforestation from many respondents.



What this means for Welsh upland farming

The NFU Cymru Vision for Welsh Upland Farming survey reinforces our understanding of the multi-faceted role that Welsh upland farming plays. The survey is testament to the passion and commitment of upland farmers to their animals, the land, communities, traditions, and the Welsh language.

The relative importance of food production and sales and direct support to farm business viability have been highlighted, as have the increased costs and challenges associated with farming in some of Wales's most difficult terrains.

In terms of future policy, more needs to be done to earn the confidence of upland farmers. Farmers identify many deficiencies in the proposed Sustainable Farming Scheme which sees direct support (BPS) that provides stability and addresses volatility replaced with an approach that rewards mainly

environmental outcomes. The research highlights that a focus on environmental outcomes brings with it the risk that equal access to tenant farmers will be difficult to secure and at the same time support will move away from the active farmer.

Farmers see themselves as well placed to deliver a range of environmental goods and reduce the climate impacts of farming. The need for greater recognition for work they have already undertaken and greater reward in future. In addition, recognition of the expertise of farmers in scheme design, implementation and delivery emerges as a common theme with the expertise (and costs) of others (advisers, consultants) questioned by many respondents.

Diversification as well as off-farm employment are important income streams on many Welsh upland farms,

however, the barriers that prevent diversification have been highlighted. Whilst there are opportunities for government to address these barriers there is a need to recognise that diversification will not be the panacea. A greater understanding of untapped potential is needed.

In addition to the challenges of Brexit, trade deals and future policy, it is apparent that Welsh upland farmers identify threats to farming, rural communities and the Welsh language, as farming is replaced to either meet wider policy objectives and other structural and demographic changes.

Overall, this research has provided a valuable insight into the role of Welsh upland farmers and their perspectives of what is needed if upland communities are to survive and be in a position to deliver valuable outcomes for society in the future.

Key recommendations

Welsh Government must commit to safeguard upland farming for the agricultural, environmental, economic, social and cultural benefits it provides through the following policies and actions:

Stability measures – in the context of profound uncertainty, it is vital that Welsh Government provides stability to the industry through the inclusion of a baseline support measure in future agricultural policy that recognises the role farming fulfils as an economic foundation in rural areas. Future policy needs to recognise the variation between farming systems, topography and climate that exists in Wales.

Balanced policy objectives – future agricultural policy must address a broader suite of objectives than currently proposed, including the need to ensure farmers can make a reasonable living, underpinning food production and the continued supply of safe, high quality affordable food, delivering vibrant rural communities and maintaining rural landscapes.

Targeting active farmers – future schemes should, therefore, be targeted at the active farmers undertaking the risks associated with food production. Additional focus is required to address specific issues of enabling access on equal terms for tenant farmers and farmers with common land.

Rewarding environmental delivery - farmers in the Welsh uplands have and continue to undertake significant environmental activity on their farms. This work must be properly rewarded through the future scheme, recognising that upland habitats are reliant on management by grazing. There should be no 'postcode lottery' of support and payment levels must go beyond current 'costs incurred income foregone' calculations.

Recognising farmer expertise – future farming policy should be designed in collaboration with farmers who understand the land they farm and know what is practically achievable on the ground.

Supporting diversification, innovation and the development of Welsh supply chains - future rural development and regional economic development

policies must include a focus on Welsh farming and provide innovative platforms to support farmers to develop a range of business opportunities including adding value to Welsh supply chains. Welsh Government and other public bodies must also seek to build resilient supply chains through their procurement policies.

Addressing poor infrastructure - Welsh Government must do more to address long-standing infrastructure issues such as rural broadband and connection to the grid for renewables projects. Costs and impacts on Welsh farm businesses associated with recreational access, anti-social behaviours and rural crime must be addressed through an enforceable code and investment in appropriate infrastructure, particularly in 'honeypot' areas

Enabling regulatory framework – regulation adds costs, undermines business confidence and can lead to unintended consequences (for example, the loss of suckler cow herds due to proposed NVZ regulations). Where regulation is deemed necessary it should be proportionate and targeted providing local solutions to local problems. Barriers in the wider policy framework, such as planning and permitting, must be addressed to facilitate farm business development, farm diversification and housing.

Creating a decision making framework to guide land use change decisions – Welsh Government must understand the long-term economic, environmental, social and cultural impacts of its policies, for example decarbonisation, rewilding projects and species reintroductions - all of which have the potential to change land use from farming, reducing opportunities for the next generation. A decision-making framework is needed to ensure a balanced approach and social justice for rural communities.

Supporting young farmers – addressing the above recommendations will support a viable economic future for Welsh upland farming for both current and future generations. Further specific measures to facilitate succession and opportunities for new entrants and young farmers must also be considered through the future policy framework.



A Vision for Welsh

UPLAND FARMING

#Vision4WelshUplands

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