

Analysis of the consultation responses on Strategic Framework for Welsh Agriculture

This document presents an analysis of the forty four responses to the consultation on the Strategic Framework for Welsh Agriculture.

There is a summary of responses to each of the consultation questions. After the summary a list of bullet points is provided as further detail. These are actual comments from the respondents and are not necessarily the views of the Welsh Government or any of the organisations which supported the Welsh Government when the consultation was launched. The bullet point comments are organised by loose groupings of respondent to provide a more nuanced picture of responses offered. **Annex A** lists the different groupings.

Question 1: Do you agree with our shared vision for agriculture? Would you suggest an alternative?

Summary

The majority of respondents agreed with the proposed vision and welcomed attempting to set a long term view of agriculture. A minority were concerned that the vision statement omitted a key word or aspect. Suggestions for additional words/issues were to add diversity, include food and fibre, add sustainability, reflect the needs of rural communities and the tourism sector, or add specific reference to achieving FGW goals. There was some concern that people understand the vision goes further than food production. Some of these same respondents were concerned that a short vision statement was too open to interpretation.

Other respondents said the vision and supporting text needed to make clearer the importance of accessibility and better linkage to Rural Development Plan 2014-20 programmes to generate wider activities and influence.

Farmers, interested farming bodies and related organisations

Five strongly agreed / agreed commenting:

- Through the Wales AHWF, we are working in partnership with Welsh Government to ensure continuing and lasting improvements in standards of animal health and welfare. This can in turn, improve farm business incomes, the sustainability of farm businesses and to realise our potential in the market place.
- We also support the outcomes (set out on page 5) for the agriculture industry but would suggest that if this is to be the “umbrella”. Framework then some consideration be given to altering the wording of the outcomes to make them stronger statements for example;

Wales has an agriculture industry which is sustainable – economically, socially and environmentally”;

Wales has an agriculture industry that is an efficient producer – with high standards of animal health and welfare.....

- More youngsters to be able to come into farming.
- Government ambitions need to be realistic and set to the background of an industry (sheep, milk) which is now losing money against production costs.
- The principals are good, but not enough account is taken of the farmer as an individual. In particular, with regards to resilience, farmers are particularly vulnerable. The farmers most vulnerable to financial and other problems were those with small farms and mixed farming operations.
- Mobile phone providers are already decommissioning less profitable masts in Wales. Embracing new technologies to be innovative is paramount for farmers now and in the future, many farms have little or non mobile phone reception, extremely slow broadband, and inadequate (if any) electricity connections.
- Unfortunately we cannot always compete on price in a world commodity market. As farmers in Wales we have a great story to share with consumers, we need more positive informative campaigns to promote the benefits of the 'low carbon farming' that produces environmental benefits as well as quality food.

One respondent neither agreed nor disagreed:

- Revised vision could read: We want an agricultural industry which is a large employer, prosperous & resilient, promoting Wales' present & future well-being.

Three disagreed with the proposed vision commenting:

- We need to be able to farm without production subsidies and be profitable i.e Pillar 1 and be profitable. When farmers rely more on subsidies to run their business it stifles innovation and change in mentality becomes very difficult.
- For Wales to be more prosperous it can only be achieved by improving the quality and quantity of our red meat and increase our market share globally.
- Unless we record and measure accurately we cannot identify our strengths and weaknesses and be in control of business.

- Training is essential to maximise potential of the investment to make business more profitable.
- Assumptions underpinning our vision are misleading. Use the word 'prosperity' and assumes it means more production, more growth and more profit. It doesn't. Prosperity is not synonymous with income or wealth. Suggest change choice of words and read 'Prosperity without Growth' I would suggest a vision that states 'All food from Wales will be the product of environmentally responsible farming'
- Support the vision and that high standards of animal health and welfare must feature predominately in any measures to develop the full potential of the agriculture industry as an efficient producer.
- You state a vision and a framework, not a strategy. Is it not possible to have a strategic framework for delivering a vision? Don't you need a strategy for how to work together? You suggest a list of principles proposed by the Industry-Led group as though they have been accepted and agreed, is that the case? If so, where are the principles that have been agreed in the Well Being for Future Generations Act? What is the relationship, if any, between that Act and this 'vision'? You say that you are not proposing details, yet admit some exists and is already in place. If so, why can't you tell the reader and explain your choice. The main flaw in this approach is that you are searching for a vision of "what we want", but it is not clear that what is wanted is; a) achievable, b) desirable.

Local Government and related organisations responses:

Eight agreed with the proposed vision commenting:

- It leaves room for adaptation and change, which we welcome. We recognise the need to continue to support productive farm units so that agriculture remains innovative and responsive to economic and market trends. We suggest there is scope for the more productive units to mentor and support the less productive ones that rely more strongly on agri-environment schemes to maintain viability. We believe that there is also scope for developing mutual support mechanisms for co-operative farm units.
- Better prosperity might also achieve increased farm-based employment within a heavily automated industry. A new rural paradigm may emerge, where farming re-integrates with local circular economies, where local markets become increasingly important to farming, plugging the gaps and holding more rural spend within local economies.
- There is scope for a stronger agro ecological vision to support the sustainability perspectives of the document.

- We recognise that Welsh agriculture should be market focused and alive to demands but we also believe that Welsh agriculture should be actively influencing markets i.e. producers should be driving this agenda more, creating opportunities and not simply reacting to the market focus of other players. This is particularly relevant to sheep production in the areas of promoting the benefits of eating Welsh lamb, and creating interest in demand for meat from diverse breeds and production systems in order to support the rich diversity of sheep farming systems that exist.
- Agree with vision but include more emphasis on the link between producer and consumer and the need for better public understanding of the industry
- More engagement with other sectors beyond union and farmers themselves would give a better insight into what is going on at ground level.
- An approach which focusses on more joined up delivery of programmes is vital to achieve better outcomes and will underpin the well-being, not just of the industry, but of rural Wales and Wales as a whole.
- On sustainable land management including carbon, water quality, habitats, bird, target species etc including future opportunities for Payment for Ecosystem Services (PES)
- Building human capital to take advantage of improved entrepreneurship, diversification aligned to and outside agriculture
- Understanding global markets and collaborating and co-ordination within Supply Chains.
- To gain real change in the industry there needs to be a change in culture from educational standards and outputs to policy change. Farmer education is key from an early age. More engagement with other sectors beyond Union and farmers themselves would give a better insight into what is going on at ground level.
- Agree with vision for a resilient agricultural industry which will promote Wales' present & future wellbeing.
- Farm businesses need to be resilient and robust and able to withstand setbacks – from natural causes and able to manage better.
Add the word "diversified" to the vision statement.
- Welcome Welsh Government's plans to help establish an industry that is forward looking; uses best practice; works to safeguard and enhance soil, water and the natural environment, with the proviso that this also

includes an explicit objective to restore and protect farmland wildlife (habitats and species).

- Agree with the overall sentiment of the shared vision. However, given the crucial role that biodiversity plays in farming systems we believe that it should be noted and so suggest the following; ‘A prosperous, resilient agriculture industry promoting Wales’ present and future well-being while protecting biodiversity and the environment.’
- Would like to see mention within the vision of Government recognising the role that agriculture plays in the economic, environmental, and social aspects of Wales and that Government will be equipped to carry out its regulatory and industry wide responsibilities.
- There will often be trade offs between production and environment and this should be recognised and accepted by all parties. Diversity of focus of farming businesses i.e. environment at one end productivity at the other, with many different levels of balance in between should be seen to be desirable in meeting the demands of food production and environmental needs and biodiversity
- Concerned that in trying to achieve simplicity there is too much room for interpretation. If the Vision were amended to include reference to the Goals set out in the Well-being of Future Generations Act. It might read:
“A prosperous, resilient agriculture which contributes positively to all the goals of the Well-being of Future Generations Act”.

Three respondents disagreed:

- Think that agricultural policy is to do with more than productivity and economic growth and that it concerns other groups besides industry bodies. We also recognise that the stewardship of the countryside is largely in the hands of the agricultural sector which needs support to fulfil this crucial role.
- Finds the “vision” of limited use because it relies so heavily on generalisations and wishful thinking that it does not provide a clear framework for effective strategy.
- Fibre in the form of timber or biomass is also a product of land management but is not defined as food, this statement should be amended to include “food AND FIBRE”.
- Although we agree with the vision for “A prosperous and resilient industry which promotes Wales’ present and future well-being”, we have significant concerns about the level of ambition. This is because the description of sustainable production is characterised by the phrase “limiting any damaging side effects”.

- The struggle to remain viable means that some parts of the agricultural industry are already encountering significant issues in terms of environmental sustainability.
- Whilst the overarching vision statement echoes the language of the Future Generations Act, the subsequent description of sustainable production means that it could be open to misinterpretation. It therefore requires a clearer statement of the need to respect environmental limits and the need to tackle existing problems alongside the other well-being goals. As signalled by the introduction to the consultation document, the sustainable management of soil, water and the natural environment comprises the bedrock of a sustainable farming industry. Further work will be required, however, in order to develop the necessary mechanisms and the ways in which these are linked to the requirements of other legislation such as the Environment Bill. We should not forget that farming has a great opportunity to contribute to the delivery of a wide range of services that can support Welsh society and the natural environment. The provision of such services could be exploited by farmers and land managers to support business diversification and deliver more sustainable businesses in the longer term.

One neither agreed nor disagreed:

- Unfortunately we cannot always compete on price in a world commodity market. As farmers in Wales we have a great story to share with consumers, we need more positive informative campaigns to promote the benefits of the 'low carbon farming' that produces environmental benefits as well as quality food.

Horticultural Organisations

One agreed commenting:

- As mentioned in the document there is no timescale. It is likely that new issues will arise that are not discussed in this document e.g. new plant diseases, invasive species. These will require review of the document at regular intervals. We agree that horticulture is recognised as an important part of Welsh food production, of land use and contributes to landscape. Its inclusion and recognition in this framework is apt and appropriate.

One disagreed:

- Vision should read: An agriculture industry, no longer reliant on subsidy funding, and operating through vibrant and diverse localised systems of production so farmers have secure markets in food, energy and other crop products on their doorstep, creating a healthier, happier and sustainable Wales; thus in turn, helping to meet other high level Welsh Government priorities such as improving the health of the nation

Universities

One agreed:

- A greater emphasis on animal welfare would be welcomed. This is especially important if agriculture is to continue grow beyond Europe where welfare standards may differ from those in the U.K.

One disagreed:

- We believe it should also include the term 'sustainable'. Adding this will help encourage long-term thinking about social sustainability (safety, health and wellbeing of the workforce) as well as environmental and economic factors.

Other

Seven strongly agreed / agreed with the proposed vision:

- There is a pressing need for change which better addresses existing and potential markets, results in a more resilient, profitable and sustainable Welsh agriculture and protects and enhances the natural environment. Welsh agriculture needs to diversify.
- The challenge will be to get disparate groups, often with their own agendas, to work together for the overall benefit of Welsh agriculture.
- The agricultural sector is of substantial importance to the Welsh economy and its related communities but still has untapped potential.
- To build a more profitable sector one should "Buy what one sells, not sell what one buys" i.e. produce what the customer led market wants at a price and value the market is willing to pay.
- It is ambitious - in particular where it aims to "limit any damaging side effects of agriculture" and agree in principle that "The protection and management of our natural resources should not conflict with production".
- We very much welcome the fact that animal health and welfare has been identified as a key focus area for transformational change to the industry.
- Whilst we recognise that the purpose of this consultation is not to set out the detail of any plans or targets, it will be vital for these to be in place as soon as possible. This will enable industry and Welsh Government to start plotting out the route to achieving this vision and quickly move from talking to action, in particular to maximise the benefits offered through the Rural Development Plan for Wales.

- Would agree with the overall sentiment of the shared vision. However, given the crucial role that biodiversity plays in farming systems we believe that it should be noted and so suggest the following; 'A prosperous, resilient agriculture industry promoting Wales' present and future well-being while protecting biodiversity and the environment.
- Would like to see mention within the vision of Government recognising the role that agriculture plays in the economic, environmental, and social aspects of Wales and that Government will be equipped to carry out its regulatory and industry wide responsibilities.
- Diversity of focus of farming businesses i.e. environment at one end productivity at the other, with many different levels of balance in between should be seen to be desirable in meeting the demands of food production and environmental needs and biodiversity.
- A clear vision for sustainable farming (at all appropriate geographical scales), with supporting evidence-based indicators of sustainability across different farming systems. Creating a vision based on sustainable development will reflect Welsh Government's commitment in this regard and help move farming in a direction that will ensure that the industry contributes to the Well-being Goals recently established by the Well-being of Future Generations (Wales) Act 2015.

Question 2. What is the reaction to our assessment of the opportunities, threats and challenges that the agriculture industry must address? Are there others?

The bullet points below have been broken down into approximate groupings, and are actual comments from the respondents and are not necessarily those of the Welsh Government, any constituent part or connected body.

Summary

Respondents raised a variety of points of detail but no new, fundamentally different opinions about opportunities, threats and challenges. Responses generally supported the analysis presented in the consultation document. Climate change concerns were raised specifically in relation to future soils and land management strategies. Accessibility and better linkage to the Rural Development Plan 2014-2020 programmes was mentioned, to generate wider Framework activities and influence. Collaborative working was referred to as key to success and how it should mirror the ethos of Rural Development Plan and Welsh Government strategic aims/objectives.

Farmers, interested farming bodies and related organisations

Five agreed:

- Effects of climate change and severe weather need to be considered and improved responses from WG need to be in place. Mobile phone providers are already decommissioning less profitable masts in Wales. Embracing new technologies to be innovative is paramount for farmers now and in the future, many farms have little or non mobile phone reception, extremely slow broadband, and inadequate (if any) electricity connections.
- Drive improvements in the industry to raise efficiency, profitability, and productivity: Strengthen capacity to withstand setbacks whatever the cause: recognised food products with large and well established UK and EU markets with potential for increased exports and improved added value: support for producer groups and cooperatives. Potential for more co-operation within the agriculture industry and to strengthen supply chains: Threats: The emergence of new animal disease.
- Feel that insufficient recognition is given to the challenges/ threats from factors which are outside the control of industry bodies and Welsh Government. An example is the devastating collapse in commodity prices in the dairy sector which is having a huge effect on farm incomes and profitability – which will inevitably indirectly have a negative impact on the health and welfare of animals as farmers seek to cut costs. The need to grow and develop markets is understood but farmers also need to have better regulated supply chains to enable them to retain benefits

they may make through increased efficiencies and not have them eroded by the powerful retail sector.

- Raising animal health and welfare standards and improving efficiency is one area where industry and Welsh Government can make a difference. There are opportunities to use the Rural Development Plan for Wales to raise animal health and welfare awareness, through knowledge transfer and development of disease eradication schemes. Improved biosecurity can be encouraged through focussed grant support and the development of quarantine units as alternatives to the six day standstill. A more holistic approach can be encouraged to animal health planning and getting farmers and vets to work together.

Two disagreed commenting:

- A framework for Welsh Agriculture requires joined up thinking as between government, environmental, climate change, sustainability and economic aspirations/obligations. This strategy needs to dovetail with other departments of the government.
- The agricultural industry and dairy farming in particular, is undergoing massive restructuring due to market forces and globalisation. This is well documented and evident in recent demonstrations against low milk prices paid to farmers. The number of dairy farms is going down, the size of farms are increasing, the production levels are going up (in order to reduce unit costs and increase incomes)

Local Government and related organisations

Seven agreed with the analysis in the consultation commenting:

- Additional opportunities: Wales has been a Market leader in the organic sector for a number of years. The historic investment in time and money needs to be maintained and not lost to ensure diversity and reducing risks within the whole of the farming industry. Diversity in food products and farming approaches gives the consumer choice and improves understanding of the agricultural industry by the general public.
- The uplands have been repeatedly acknowledged as being essential to Wales yet inherent problems remain. These include the decline in upland cattle herds and in the population of the registered semi-feral Section A Welsh Mountain Pony, accompanied by increasing numbers of unregulated equines; the inherited poor condition of most of Wales' upland habitats as a consequence of historic management and pollution and modern arson and visitor pressure.
- There is a need for more flexibility and ability to respond quickly in the industry. Markets are going to remain volatile probably forever. The

industry needs to be prepared to save money, restructure, adapt and respond more quickly than it does now.

- The role for agriculture and agricultural support in delivering objectives, including ecological resilience and the ecosystem approach under the Wellbeing of Future Generations Act 2015 and the Environment Bill.
- Declining biodiversity as catalogued in the National Ecosystem Assessment and State of Nature Report, and the loss of farming's 'silent army' of free wildlife helpers (pollination, pest control, fertilisation etc.)
- Undeveloped market potential for products such as carbon storage renewable energy generation, forestry, and water management." A valued landscape important for the tourism industry but with potential for better functioning ecosystems and the services they provide.
- Predictions for climate change and environmental change, including the prospects of new animal and plant diseases emerging."
- We need all involved in the industry and further supply chain to be skilled, commit to on-going training and promote the industry as one where sustainable careers and businesses flourish.
- To ensure that agriculture is the key driver which protects and enhances the national and international landscape status of these areas.
- The main challenge we believe is not economical but cultural, this framework does not address the strong influence the Welsh culture has on agriculture.
- Creating a thorough understanding that production, good farming practice and care of the environment go hand in hand will be fundamental to the long term health of the agricultural industry. It will also deliver successful implementation of natural resource management as proposed in the Environment Bill. In the shorter term, the need for many farmers to ensure that they remain profitable continues to erode their capacity to achieve longer term objectives
- Although climate change issues are mentioned at several points in the consultation document, there is no reference to the vital role of the agricultural sector in contributing to devolved Greenhouse Gas (GHG) emission reduction targets (especially since c20% of Welsh emissions come from the land use sector). A more explicit statement of the importance of GHG emission reduction through using mitigation measures (such as those set out in the Red Meat and Dairy Roadmaps) would be useful. In relation to the reference to a 'lower carbon footprint' it is critical to ensure that resource and emission efficiencies result in a net reduction in Welsh agricultural sector

emissions (as will be required by the Carbon Budgets set out in the Environment Bill) rather than just a per hectare reduction in the carbon intensity of agricultural output. The need for a net reduction in GHG emissions should be made much more explicit.

- The undeveloped market potential for other agricultural products such as carbon storage and sequestration, renewable energy generation and water management provides substantial scope for the establishment of new systems of payments for ecosystem services (PES).
- Welcome the consideration given to climate change. However, whilst we recognise the legitimacy of the concern, a greater focus needs to be made on the direct changes - likely temperature changes, altered rainfall patterns, and the effects of increasing extreme weather events.
- Agree with the need to strengthen capacity and increase resilience and we believe that much more defence of CAP support needs to be made on the basis that it supports capacity and resilience, acts as a buffer against volatility, supports rural economies and aids food accessibility.
- Accept that we are in changing times in terms of financial support and ongoing CAP reform. Please see above comments as to the need to better understand the importance of 1st pillar support. We would like to see the RDPW continued to be used to promote and incentivise improvements and investments in primary farming.
- If climate change is as predicted then there should be better grass growth with the sheep industry already poised to adapt to this and potentially benefit from greater efficiencies.
- The risks to human health should also be recognised through zoonoses but also through nutrition being affected by uncontrollable agricultural diseases
- Would like to see a wide variety of land rental and share agreements to include short term lets, share agreements and longer term tenancies. Whole farm tenancies should generally be longer in term to encourage greater investment, safeguarding, and good management of land.
- Similarly, impacts of intensive farming on pollution of watercourses must be incorporated to integrate the framework with the European Water Framework Directive. We note there is no specific source document on the intensive poultry farming that is causing widespread concern in Wales.
- There is a need to advise and educate all farmers on how to let their land on FBT, understand benefits of share farming or partnerships. These should become a part of farming vocabulary to benefit all.

Two neither agreed nor disagreed:

- There is a great need and opportunity to raise the public's understanding of the industry. In general we would like to see a wide variety of land rental and share agreements to include short term lets, share agreements and longer term tenancies.
- It is positive to see diversification of solely land management for food production to include developing market potential for 'products' such as carbon storage, renewable energy generation, forestry, and water management. The agricultural industry has a huge part to play in managing the risks of climate change and identifying funding mechanisms (e.g payment for ecosystem services) will be essential for delivery of this element.
- Wales needs to address the key challenge of influencing consumer behaviour. We have an opportunity to focus on high-end, low input and low output products that are more sustainable, and we need to work together across sectors to ensure that consumers value these products.
- Welcome the consideration given to climate change. However, whilst we recognise the legitimacy of the concern, we disagree with the level of emphasis on the emergence of new animal and plant diseases: this is a symptom of the key impacts of climate change. A greater focus needs to be made on the direct changes- likely temperature changes, altered rainfall patterns, and the effects of increasing extreme weather events.
- Local knowledge will be key to developing sustainable solutions from high-level principles, but efforts need to be made to work in partnership, and upskill those involved in local decision-making.

One strongly disagreed:

- Impacts of intensive farming on pollution of watercourses must be incorporated to integrate the framework with the European Water Framework Directive.
- We note there is no specific source document on the intensive poultry farming that is causing widespread concern in Wales.
- The bulleted lists of Challenges, Opportunities and Threats do not help define key areas or bring out the dual or triple nature of many plans which are simultaneously a combination of Challenges / Opportunities / Threats. This makes it difficult to assess the consequences of policy on other areas of agriculture and the wider environment and incorporate them into strategy and timely review procedures.

- The potential adverse effects of renewable energy projects on other aspects of farming, tourism, health and well-being of rural communities, and preservation of habitats and biodiversity should be included as a threat.

Horticultural Organisations

One agreed:

- The risk posed by CAP reform must be underlined and given closer attention in this strategy to better place the industry for a future without subsidy.

One neither agreed nor disagreed:

- It is positively acknowledged that the opportunity is identified to champion healthy eating and the wider presence of the industry beyond the farm gate including working with community based growing initiatives and food banks. However the opportunity posed by community growing projects is far wider than what is being suggested.

Universities

One agreed:

- The need for high-quality education at all levels to address the skills gaps, and the need to optimise research and teaching facilities in a combined and cooperative approach is welcomed. The threat of climate change and the likelihood of new animal diseases emerging further necessitates the need for continuing education.

One disagreed:

- There is insufficient consideration of work-related health and safety issues. It is vital to prevent the terrible human toll of work-related injury, illness and death that blights the agricultural sector. These failures inflict lasting harm on farmers, their families and their businesses. We specifically suggest ...good farming practice, care of the environment and a safe and healthy workforce, all go hand in hand”
- Threats: we suggest it should read “...including the prospect of new animal diseases (including zoonoses) and plant diseases emerging”

Other

Six strongly agreed / agreed with the analysis commenting:

- Fully support the vision of sustainable production outlined in [paragraph] 18. Welsh agriculture must be economically, environmentally and socially good, with multiple outputs and ecosystem

services. It should be less dependent on subsidies and better orientated to meeting these needs.

- Increasingly uncompetitive infrastructure (road, rail and internet). Lack of clear export opportunities.
- By ensuring the soil is managed in a regenerative (aiming to be sustainable in this regard is initially not sufficient, it must be replenished and improved prior to being able to aim for sustainable production) and holistic manner would ensure that crops whether directly for consumption or animal feedstock access soil nutrients and grow well balanced nutritious produce which satisfy human consumption.
- Agree with the assessment of the opportunities, threats and challenges that the agriculture industry must address. However we do feel that insufficient recognition is given to the challenges/ threats from factors which are outside the control of industry bodies and Welsh Government. An example is the devastating collapse in commodity prices in the dairy sector which is having a huge effect on farm incomes and profitability – which will inevitably indirectly have a negative impact on the health and welfare of animals as farmers seek to cut costs. The need to grow and develop markets is understood but farmers also need to have better regulated supply chains to enable them to retain benefits they may make through increased efficiencies and not have them eroded by the powerful retail sector.
- There does however need to be an acknowledgement that without farmers there is no agricultural industry. Farmers do need to be encouraged rather than hindered in their efforts. Farmers are generally a resourceful group and given the right environment they will naturally innovate and diversify. There is a need for flexibility to allow the industry to flourish: too much regulation will stifle enthusiasm and opportunity.
- There is still a challenge for farmers around the complexity of regulation and resultant actions required from them. A commitment was made in 2012 through the 'Working Smarter' report to reduce red tape and gold plating of legislation, however with SAF 2015 being more complex than ever it would appear that the aims of the report are not being achieved. This is a challenge and a threat to farmers, particularly if this trend continues with increased risk of failure to complete SAF forms, or comply with cross compliance.
- There are increasing challenges for individuals living in areas with poor internet connection, and those not being included in the upgrade to Superfast Cymru fibre broadband. There is a growing need to be online in order to run a farming business in the most efficient way and to access the latest information needed to benefit your business. The solution to this would be investment in better 4G signal in rural areas.

- The greatest threat to the farming community is financial uncertainty and this can, to a large extent, be mitigated by better planning around the next reform of the CAP. Lessons should be learnt from this review and would like to see RDP and SAF proposals in place ready for the next period well in advance.
- See growing opportunities around genomics. Using livestock genetics and research to gain major improvements in performance with no increase in inputs/stock numbers required
- More specifically we believe that the consultation document does not adequately highlight the importance of a healthy environment in sustaining the Welsh agriculture industry. Healthy soils, water and wildlife provide the building blocks of the industry, without healthy soils and water agriculture would either be impossible or at least prohibitively expensive. Similarly failing to protect wildlife would threaten processes, such as pollination, which make agriculture possible. Failing to recognise these threats is likely to cause the industry significant difficulties in trying to develop a sustainable future.

Question 3. Do you have other comments and views, including on how the partnership approach should work?

The bullet points below have been broken down into approximate groupings, and are actual comments from the respondents and are not necessarily those of the Welsh Government, any constituent part or connected body.

Summary

There were two clear issues developed in this section in relation to the Partnership Group. One view supported a constitution which had a clear agricultural focus whilst the alternative called for a group managing a wider environmental and social agenda.

Farmers, interested farming bodies and related organisations

Eight said yes:

- The Partnership Group must have a strong farming majority, and meet at locations convenient to the farming community. In return farmers, not just the unions, must be prepared to contribute more time and effort to debating policy issues.
- Forestry and better woodland management would improve biodiversity and the environment.
- Have a cross section of hard working farmers.
- Farming is very simple, superior animal genetics, good soil and grass management to maximise genetic potential of our animals or crops. We have the climate to grow excellent grass still cheapest source of food for meat production. We can produce more from less land and become a more sustainable and profitable business. In doing it will also add value to our food and drink sector
- The signatories are dominated by the dairy and beef industry and the FUW and NFU. This is hardly representative of all land managers in Wales who produce products and services. Where is the tourist industry, for example, and horticulture? If these signatories reflect the partnership then it is far too narrow.
- Suggest that a clear governance model is established to ensure that their respective roles and responsibilities are communicated effectively and that they speak with one voice on animal health and welfare.

Local Government and related organisations

Ten said yes:

- A cooperative approach could help farmers to collectively reduce nitrate inputs within a catchment; there is less incentive to do this if they are operating as individual business entities.
- Surprised by the limited references to tourism in the consultation document, given that many Welsh tourism businesses are farm based. Tourism requires an attractive and diverse landscape and the need to sustain this should feature highly in agricultural policy and strategy.
- Think that the setting up of a Partnership Group established by the industry and chaired by someone from within the agricultural industry is a good idea. Also think it's a good idea for the Welsh Government to be a member of this group. Keen to stress the importance of resilient farming and sustainable farming for the delivery of environmental outcomes and for landscape and tourism and as such the chair person who would have responsibility for ensuring that there is adequate representation of the environmental sector members on this group.
- Consideration of governance arrangements and relationships with existing groups will be crucial.
- Suggest that at the earliest opportunity consideration is given to the role of the Partnership Group in an exotic disease outbreak.
- The partnership group will need to set clear targets so the industry has a clear understanding of where it needs to be and what areas of the agriculture sector has potential areas of growth.
- It is notable that nature organisations, higher education and other non-farming organisations (such as Dwr Cymru, Natural Resources Wales, Local Government) are omitted from this list. All these organisations are important stakeholders in the stewardship and management of the countryside and ecosystem services it provides.
- The membership of the group would need to reflect the important areas of Animal Health and Welfare, Environment, Glastir, Woodland and We suggest that the proposed Partnership Group should focus on the development of more strategic approaches to the development of each agriculture sector, promoting early engagement with regulators such as NRW.PES and Skills, Training and Careers.
- Suggest that the proposed Partnership Group should focus on the development of more strategic approaches to the development of each agriculture sector, promoting early engagement with regulators such as NRW.
- The need for innovation and cross-sectoral working should also be reflected in the Terms of Reference for the Partnership Group.

- Firmly believe that it will be essential to broaden the membership of the proposed partnerships if the strategic framework is to succeed. It will be essential to ensure that the long term view is taken in all decision making processes, and that short term impacts are mitigated rather than prioritised in policy.

Horticulture

Two said yes:

- Wish to see the proposed Partnership Group consider agriculture within the context of the whole of the Welsh economy, and sustainable environment. Weight needs to be given to all the components described in the document when formulating and delivering the strategy. It is recognised that the majority of farm and horticulture businesses in Wales are relatively small. This structure for the industry is very important for the maintenance of rural communities. Would wish that the planning of the structure and organisation of the industry, so as to support the maintenance of communities, to be a priority for the Partnership.
- For the Partnership Group to be successful it is essential that there are representatives not only from the agriculture sector but also from health, education, community and environment to ensure that the delivery of the vision is balanced and does not become skewed by commercial factors. This is essential to ensure that farming becomes a sustainable industry in the widest sense.

Universities

One commented:

- Would be good to link to existing partnership arrangements such as the Farm Safety Partnership and the Welsh Government Agriculture Knowledge Transfer Group.

Other

Six respondents made comments:

- Is heavily weighted by its very nature towards the livestock industry and the status quo. There needs to a wider more independent partnership capable of thinking outside the box and to challenge the status quo. Conceivably, a policy group to advise government should be set up, along the lines of the Policy Commission which produced the 2002 Curry Report on the Future of Farming and Food.
- It can only be advisory but bringing together the major stakeholders should be a powerful approach. It should be willing and able to co-opt

additional members even for specific topics to ensure complete knowledge, including from EU and Defra.

- Although only advisory, the authoritative and informed direction of the Partnership Group must be heeded by Welsh Government.
- The formation of Action Groups would assist in disseminating this high level vision to action on the ground, improve and promote accessibility of RDP funding opportunities.
- The Partnership Group will need to be chaired by a strong person and each member of the Partnership Group will have to work tirelessly towards achieving the Vision.
- The Partnership Group should not be confined to the agricultural industry and the Welsh Government because it is inappropriate for a limited group to “own” a vision which has such far-reaching impacts on us all. Nor would this limited partnership be optimal for successfully raising the positive profile of farming in Wales. The genesis of the Partnership Group is also unsatisfactory because it will already exist, formed from within the industry, before agreeing its membership. It will then have a direct relationship with the Welsh Government in developing policy and strategy without any public scrutiny.
- The partnership should include expertise able to comment on and champion other land uses as these other land uses will provide alternative income for farmers and the partnership should not be blinkered to their benefits.
- Appreciate the inclusive partnership approach which is often sought out by Welsh Government. The group needs a balanced view from all industries involved in agriculture. The group needs the ability to offer ideas and schemes which Welsh Government is willing to investigate and act upon.
- There should be a fair representation of members on the partnership group from the uplands of Wales.
- To be effective the Partnership Group must help set clear direction and objectives for the agricultural industry, to be delivered through action plans designed to secure measurable outputs/outcomes. The proposed length of the resulting Strategy, i.e. up to 2020, will enable Welsh Government to align agricultural objectives with the need to meet several environmental targets by the same date, including halting the loss of biodiversity. This approach is essential if Wales is to have a progressive, productive and profitable agricultural industry built on sustainable land management practises and principles.

- All farming sectors and systems are represented, including High Nature Value farming systems, essential for securing a diversity of environmental and social benefits.

General Comments

The bullet points below have been broken down into approximate groupings, and are actual comments from the respondents and are not necessarily those of the Welsh Government, any constituent part or connected body.

Farmers, interested farming bodies and related organisations

Twelve responses in total

- Welsh farmers are currently facing a period of extreme volatility across all the key agricultural sectors with farmgate prices for milk, lamb and grain in particular having plummeted even further in recent weeks. The current situation emphasises the need for Industry and Government to work together on a strategic framework that seeks to build a productive, profitable and progressive agricultural industry in Wales. There is an urgent need to develop policies that will enable Welsh farmers to be able to better manage volatility and develop resilience in their farm businesses.
- An omission from the document is lack of recognition of EU policy.

Local Government and related organisations

- The sentiments set out in paragraph 18 demonstrate the nature of the challenge not only for the industry but for all those with an interest in a sustainable future for rural Wales, not least in our designated landscapes where the framework is in place to bring all stakeholders together for their mutual benefit.
- As food producers and custodians of the landscape, Welsh red meat producers not only play a vital role in supporting the rural economy but are also integral to the sustainable management of the land upon which our food and tourism industries rely.

Other

- There are opportunities to landowners and managers in the agricultural industry to benefit from the historic environment and the sense of place it bestows upon their business.
- A well-managed and strong agricultural economy and a well-managed historic environment are not mutually exclusive, but can be mutually beneficial, thus our request to include the historic environment in the document.

- There is an overarching legal requirement that food should be safe pleased to note reference in your consultation document to the need for agricultural policies in Wales to champion food which is safe, readily available and affordable.
- Highlight the importance of considering gender as the new Framework is developed.

The following organisations said they would welcome the opportunity to contribute / work with the Partnership Group:

- British Veterinary Association
- Coed Cadw
- Chwarae Teg (support on embedding gender change)
- Food Standard Agency
- Institution of Occupational Safety and Health (and nominate a representative from Rural Industry Group)
- Organic Sector
- National Parks
- National Resources Wales (NRW)
- National Sheep Association
- National Trust
- RSPB
- Wildlife Trust