

To:

Date: October 2021

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NFU Cymru Response - Shaping Wales' Future: Using National Indicators and Milestones to measure our Nation's progress

NFU Cymru welcomes the opportunity to respond to the Welsh Government consultation 'Shaping Wales' Future which seeks views on setting national milestones for Wales.

NFU Cymru's vision is for a productive, profitable and progressive farming sector producing world renowned climate-friendly food in an environment and landscape that provides habitats for our nature to thrive. Welsh food and farming delivering economic, environmental, cultural and social benefits for all the people of Wales whilst meeting our ambition for net zero agriculture by 2040.

The importance of the farming industry in rural Wales cannot be overstated. Welsh farming businesses are the backbone of the Welsh rural economy and the axis around which rural communities turn. The raw ingredients produced on Welsh farms are the cornerstone of the £7.5 billion Welsh food and drink supply chain employing 229,000 people.

The Welsh public associate Welsh farmers, first and foremost, with providing safe, high quality and traceable food. Welsh farmers also look after 80% of the land area of Wales, maintaining and enhancing our natural environment – Wales' key asset. Farming activity supports a diverse range of species and habitats, provides a range of ecosystem services including carbon sequestration, flood alleviation; also delivering the significant backdrop – our iconic Welsh landscapes – for Wales' tourism and recreation sector worth an estimated £3 billion annually.

Welsh farmers are also key promoters and protectors of our culture, heritage and language with the highest proportion of Welsh speakers of any sector.

We note the Welsh Government consultation seeks views on national milestones to deliver a stronger, fairer and greener Wales. Welsh Government are taking a two-wave approach – this consultation considers the first wave of nine national milestones with a second wave of national milestones delivered in 2022. The consultation also asks for feedback on proposed changes to national indicators reflecting the lessons learned from the COVID-19 pandemic.

Given the important contribution of the agricultural sector to the economic, environmental, social and cultural well-being of Wales as a whole, NFU Cymru has a strong interest in this consultation. Whilst it is not our intention to respond to each of the questions posed, NFU Cymru would make the following comments relating to the development of appropriate milestones and indicators relating to food production and our capacity to feed ourselves as a nation now and in the future.

National Milestones

Question 7 - Do you agree with adopting the existing Net Zero greenhouse gas emissions target as a national milestone?

NFU Cymru has set the ambitious target for [Net Zero Agriculture](#) by 2040. Our approach, based on the latest scientific evidence, will require a focus across internationally recognised greenhouse gas inventories and action in the following three key areas:

- Improving farming's productive efficiency
- Improving land management and enhancing land use to capture more carbon
- Boosting renewable energy and the wider bioeconomy

NFU Cymru believes that Net Zero Agriculture should not be achieved by off-shoring food production or greenhouse gas emissions. It is important to recognise that Wales is expected to become an area increasingly favoured for agricultural production moving forward, when compared to other regions across the world where climate change impacts are expected to be more severe and disruptive. Wales's productive agricultural capacity should be maintained and enhanced and decarbonisation policies in Wales should not result in widespread land use change. We want an approach that is practicable and evidence-based, that is economically and socially just and based on land-sharing not land-sparing.

The UKCCC recognises that the transition to net zero must spread costs fairly across society. In the context of the extremely ambitious tree planting targets recommended to Welsh Government by the UKCCC, NFU Cymru has recently launched our [Growing Together Strategy](#) for sustainably increasing tree cover in Wales. We are calling for the establishment of a Just Transition Commission in Wales to ensure the burden of decarbonisation does not fall unequally on our rural communities. We also want to see a decision-making framework established to guide land use change decisions so that the long-term economic, environmental, social and cultural impacts can be properly assessed and understood.

In the context of this consultation we believe greater transparency from Welsh Government is needed about how trade-offs and unintended consequences between the milestones and indicators are to be assessed and managed. We are clear that ambitions for Wales to be Net Zero by 2050 cannot be achieved at the expense of economic, social and cultural well-being in our rural areas.

Question 8 – Do you agree with adopting the existing Cymraeg 2050 target of reaching a million Welsh speakers by 2050 as a national milestone?

Following on from our response to Question 7, the proposed 'Cymraeg 2050' target of reaching a million Welsh speakers by 2050 is a case in point highlighting where the achievement of one indicator like net zero targets could undermine or negatively impact another, such as the Welsh language. NFU Cymru would, therefore, support the introduction of this target as a national milestone. We highlight that section 78 of the Government of Wales Act 2006 requires Welsh Government to adopt a scheme setting out how the Welsh language will be promoted and how its use will be facilitated.

The scheme recognises the prevalence of the Welsh language within farming and rural communities and as such notes the importance to the Welsh language of sustaining and promoting agricultural interests. The Well-Being of Future Generations Act also places a duty on all public bodies to enhance the well-being goals which includes 'A Wales of vibrant culture and thriving Welsh language'.

The Welsh Government paper 'Farming in Wales and the Welsh language' (2016) states that 'moves to undermine the viability of Welsh agriculture are likely to represent a significant threat to the Welsh language...'

The Welsh Government Agriculture in Wales document from 2019 provides a summary of the number of Welsh speakers based on 2011 census results. Overall, 43% of workers in Agriculture,

Forestry and Fisheries speak Welsh compared to an average of 17% across all workers in Wales. This figure is the highest percentage of any sector.

Overall, it is our strong view that a thriving Welsh language in rural areas is underpinned by thriving Welsh farms; any proposals that weaken the farming sector will ultimately weaken our Welsh language and what defines us as a people and a nation.

National Indicators

Question 12 – Do you think an indicator on a minimum digital living standard should be added to the existing indicator set?

NFU Cymru would support the addition of a minimum digital living standard indicator to the National Indicators. NFU Cymru has long been concerned about digital provision in rural areas. Earlier this year we joined forces with NFWI-Wales, FUW, CLA Cymru and Wales YFC to set up a digital connectivity group with the aim of highlighting the need for improved digital connectivity in rural Wales reflecting the concerns of our members that they were being greatly impacted by poor broadband connections and mobile signal.

A survey carried out earlier this year revealed:

- 50% of respondents from a rural area felt that the internet they had access to was not fast and reliable.
- Less than 50% of those who lived in rural areas stated that they had standard broadband and only 36% had superfast broadband.
- 66% of respondents from a rural area stated that they, or their household had been impacted by poor broadband.
- 75% of respondents did not know where to access support to improve their broadband connectivity and only 19% were aware of the UK wide Gigabit Voucher Scheme.

We are calling for:

- The digital divide between rural and urban areas to be closed
- Broadband and mobile signal to be recognised as an essential public service in Wales
- Welsh Government to further invest in rural infrastructure to enable rural families, farm businesses and others to capitalise on digital connectivity opportunities and not be left behind and increasing the digital divide between urban and rural areas.
- Governments to address the current barriers to improving infrastructure and to provide the necessary investment to support the roll-out of infrastructure to all rural areas.

In this context, we believe the proposed indicator should seek to reflect the challenges that exist with respect to digital infrastructure in rural areas.

Question 14 – Views on any further gaps the COVID-19 pandemic may have highlighted in the way we measure progress towards our well-being goals?

NFU Cymru is pleased that Welsh Government recognises that it is impossible to ignore the experiences of the last 18 months and is seeking views on whether COVID-19 has highlighted gaps in the current set of indicators. NFU Cymru agrees. The COVID-19 pandemic has touched and impacted on the everyday lives of every citizen, inflicting lasting damage to many sectors of the Welsh economy.

As the crisis progressed, the resilience of many systems required to sustain everyday living were tested. In the period leading up to and during the early weeks of 'lockdown', empty supermarket shelves were commonplace across Wales. Welsh Government also introduced a direct delivery food

scheme providing food parcels to clinically vulnerable individuals. The situation served as a stark reminder of the fundamental importance of access to safe, high quality, affordable food as the most basic right for all people in society.

Meanwhile, the overnight closure of food service – our hotels, restaurants, cafes and hospitality venues – which led to the instantaneous loss of key markets for many Welsh products has highlighted the fragility and inequity that exists within our food supply chains.

These events have served to highlight that food security and ensuring a stable supply of home-produced, high quality food for consumers is most certainly in the nation's interest and should be a priority for governments. People care about the food they eat, how it is produced and where it comes from, people want to see food sustainably produced. COVID-19 calls for governments to learn lessons and reflect on the direction of travel in terms of food and farming policy.

NFU Cymru has long highlighted the need for Welsh Government to include an indicator that reflects our ability to feed ourselves as a nation. We are clear that the lessons learned as a result of the COVID-19 pandemic make that need more pressing than ever, particularly against a backdrop of longer-term uncertainty about the impact of climate change on society, on our natural environment and of the role farming will need to play in feeding a growing population with diminishing resources.

Food Security

In 1984, the UK's overall food self-sufficiency was 78%. In 2021 its 60%. Food security does not require a country to be self-sufficient – that is, to produce all the food it needs within its own borders. It is economically rational for a country to import products it is unsuitable or incapable of producing itself while exporting products it produces proficiently. Wales has a long history as a food producing nation exporting to all parts of the UK, EU and further afield – indeed it is central to our economy, with food rightly recognised as one of Wales' four foundation sectors within Welsh Government's Economic Action Plan.

The global nature of the agri-food sector supports food objectives for consumers such as potential for all year-round supply of seasonal foods and greater variety and choice of products. However, such global sourcing brings its own risks and can be unpredictable, fuelling greater volatility at the farm gate and damage to supply chain resilience. Food security must, therefore, be a combination of a secure and properly functioning global trading system and a robust and resilient home supply.

NFU Cymru does not advocate that Wales should be fully self-sufficient. However, we have long held the view that Welsh Government should have higher regard of the contribution that domestic food production has towards our food security. COVID-19 impacts on our food supply chains have served to highlight that it is a matter of strategic national interest to ensure that our country can feed itself and a high level of domestic production in a volatile world is critical aspect of food security.

In the context of predicted challenges to our global food production systems, Wales also has a social responsibility to contribute to global food security, when food production systems are expected to be more challenged as a result of climate change elsewhere. Resource efficient and resilient domestic food production plays an important role in limiting our global ecological footprint and displacing the environmental impact of food supply to overseas, where environmental and animal health and welfare and social standards may be lower.

We highlight the importance of the need to secure global food supplies is increasingly recognised. The 2015 Paris Agreement on Climate Change, for example, saw food security and food production appearing in the final version of the Agreement with the fundamental priority of safeguarding food security and ending hunger, and the particular vulnerabilities of food production systems to the adverse impacts of climate change recognised.

In this context NFU Cymru is calling for a Food and Farming Commission to be established with an independent Commissioner to oversee food and farming policy from ‘farm to fork’ with annual reporting and the establishment of national indicators for food security.

Legislative context

The Well-being of Future Generations (Wales) Act 2015 seeks to improve the social, economic, environmental and cultural well-being of Wales. Access to high quality, safe, affordable food is the **most basic of requirements** to all people in society and it is critical to our well-being. Indeed, as the Welsh Government Food and Drink Action Plan 2014-2020 identified *‘Food is central to our lives. It defines our culture and economy. It shapes our environment, as well as our health and to our relations with people across the world’*. For this reason, NFU Cymru strongly believes that the inclusion of an Indicator and Milestones that reflects our capacity to feed ourselves as a nation is vital.

The new Act seeks to embed the principles of sustainable development into the decision-making process of public bodies. At the very heart of sustainable development lies the need to consider the needs of future generations as well as our own needs. Whilst access to high quality, safe, affordable food for the people for Wales may be taken for granted at present, the Future Generations Act should compel us to consider the future challenges to our global food production system which are now well documented.

Well-being goals

We identify a food security indicator would directly deliver against the following well-being goals:

- **A prosperous Wales** – the Welsh Food & Drink Supply Chain has a turnover of £15.5 billion and employs 222,400
- **A resilient Wales** – a number of important habitats and species are reliant on agricultural practices, indeed, our treasured landscape has been created, shaped and is maintained by farmers
- **A healthier Wales** – recognising the fundamental contribution that access to safe, high quality food has in supporting our physical and mental well-being
- **A Wales of vibrant culture and thriving Welsh Language** – agriculture as an industry has the highest proportion of Welsh speakers of any industry in Wales; food also contributes to our sense of place and cultural identity
- **A globally responsible Wales** – contributing to global food security in the context of future challenges and not exporting the impact of our food consumption requirements elsewhere

Sustainable Development Goals

In addition, we note that Welsh Government identifies that Wales is the first country in the world to legislate for the well-being of current and future generations in a way that ties in with the United Nations Sustainable Development Goals, described by the UN as a collection of 17 interlinked goals.

We highlight that Goal 2 refers to ending hunger, achieving food security and improved nutrition and promoting sustainable agriculture. In this context we ask Welsh Government to publish analysis of how the National Indicators deliver across each of the 17 UN Sustainable Development Goals – in our view a clear gap in relation to food exists currently.

Public interest

There is also good evidence that a food security indicator would resonate with the Welsh public in line with Welsh Government requirements. A YouGov Poll undertaken in 2018 found that 83% of those questioned associated Welsh farmers with providing safe, high quality and traceable food.

A OnePoll Farmer Favourability Survey of 2000 adults across England and Wales between 17 and 22 June 2021 showed unwavering support for British food and farming. The record-breaking level of support reached at the start of the COVID-19 pandemic continuing this year with 75% of respondents saying they trust British food more than food from the rest of the world.

In addition, at the time of writing, more than 54,000 people have signed a letter in support of NFU and NFU Cymru calls for a commitment to not let Britain's food production fall below its current level.

Without such an indicator, we would stress, that the Act has the potential for significant unintended consequences. This could include the export of 'impacts of our food consumption habits' to other parts of the world which could arise so that progress across a range of other environmental indicators included in the suite can be achieved. It should be noted, in the future, Wales is expected to become an area increasingly favoured for agricultural production when compared to other regions of the world. As such, the important contribution to our own and global food security should be recognised.

To sum up, given the importance of food as the most basic requirement for survival together with the future challenges to the global food production system, NFU Cymru believes that the inclusion of an Indicator that reflects our capacity to feed ourselves as a nation is of critical importance and we would be keen to work with Welsh Government to take forward its development.