

FRC Food Brexit Briefing

Brexit and Wales: A fresh approach to food and farming?

Jane Powell and Corinne Castle
March 2019

Series editor: Dr Rosalind Sharpe



**FOOD RESEARCH
COLLABORATION**

an initiative of the

**Centre for
Food Policy**

Educating, researching & Influencing
for Integrated and Inclusive food policy

Jane Powell and Corinne Castle are Volunteer Coordinators at
Wales Food Manifesto

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Executive summary

Brexit poses particular risks for Wales's export-dependent farmers and food producers. It also gives Wales an opportunity to make a step-change into a new approach to food and farming. Wales has a forward-looking government with sustainability high on the agenda, and a diverse geography. The size of the country gives it an advantage: small enough for individuals and projects to make a difference, big enough for economies of scale, and diverse in its landscapes and culture. It has several innovative pieces of legislation that could support a transition to fairer and more environmentally sustainable farming and food production, if political authority and public support can be mobilised to link them together. This paper looks at the steps needed to achieve an integrated post-Brexit food and farming policy for Wales that could set the standard for the United Kingdom. Central to this is a national network that can support a conversation about food and agriculture based on fundamental shared values.

Summary of recommendations

- **Support farming that has positive environmental outcomes**
Public funding must be for farming that integrates food production with care for the environment.
- **Support individual farmers to revitalize the sector**
Subsidy should be based on what farmers do, not how much land they manage, with support for new entrants.
- **Support for farming should widen the definition of public goods**
Public health and a vibrant food culture, including a food industry which provides satisfying and skilled employment, are vital.
- **Support for farming should leave room for local self-direction**
Top-down prescription by government should be balanced by an emphasis on outcomes negotiated locally.
- **Align farming with public health and the environment**
There is some scope for diversification into cereals and horticulture, and farmers should be encouraged to experiment.
- **Make use of public procurement**
The spending power of the public purse should be used to support the transition to a more diversified agriculture and a thriving food industry.
- **Strengthen public education**
Public Services Boards, Environment Act 'Area Statements', food festivals and so on should be used to engage the public with food and farming, from school age upwards.
- **Reduce food waste**
Build on existing aid for the food industry by supporting civil society initiatives such as community fridges.
- **Frame food as more than a commodity**
We should see food as the basis of good health, and a human right, as well as a social connector and our link with the natural world.
- **Establish a national civil society network**
Wales would benefit from a national body, based around shared values, to integrate policy areas and share best practice.

Introduction

Food in Wales means many things. For some it is sheep on the mountains, shellfish in Cardigan Bay and black and white cows in the ‘milk fields’ of the southwest and the northeast. For others, it is free school breakfasts, a childhood obesity rate that is the highest in the UK with over 28% overweight or obese in the most deprived areas¹, and a population that doesn’t eat enough fruit and vegetables. Then again, it is an industry² with an annual turnover of nearly £17 billion that employs a quarter of a million people, a money-earner that can never be outsourced. Or it is the growing number of food banks – 157 last year³ – which co-exists with the 300,000 tonnes of food waste⁴ thrown out by Welsh households in 2015, below average for the UK.

When food is so much part of our lives, and has so many apparently unrelated aspects, it is a challenge to join the dots and make it work on all fronts – health, the economy, the environment, social justice, farming, climate and culture. The conversations about food and farming after Brexit have stimulated a fresh initiative to see how the Welsh food system could work better. In this paper, we summarize some of the current thinking from the point of view of a citizen-led initiative, the Wales Food Manifesto.

The context: food and farming in Wales

Farming in Wales is dominated by livestock. With high rainfall and much of the land classified as hill and uplands, grass is the most successful crop, with over half of agricultural land under permanent pasture. Of the nearly 11,000 Welsh farms large enough to be included in the official classification of holding types, nearly 8000 have a beef and sheep enterprise (2017 figures). In the flatter coastal areas there is more diversity of farming,

with dairying (a total of about 1600 farms), and small numbers of cereals, horticulture, pigs and poultry.⁵

The average age of a farmer is famously in the late 50s, with far fewer people working the land than used to be the case. The total number of holdings of all types is 38,400, of which 26,000 are classified as very small, and the number of people working in farming is only 52,000, of whom a quarter are family or hired hands⁶. It is therefore not a major direct source of employment. On most farms, one or more family members has a job elsewhere, and many have diversified into other activities such as holiday lets.

Incomes in the farming sector depend heavily on subsidy. For small and medium farms, income from agriculture is often negative, and only the Basic Farm Payment and agri-environment payments convert that loss to a modest income. Compared to England and Scotland, farm holdings are smaller and less intensively farmed, and farm incomes are lower. The contribution that farming makes to the economy and employment is, however, higher⁷.

Although farming is a small part of the economy, at 0.71% of Gross Value Added in 2015⁸, this is proportionately more than in England (0.57%), and it is a culturally very significant part of Welsh life. Apart from its role in producing the raw ingredients for the food manufacturing and catering industry, and creating a vibrant countryside, it is also a stronghold of the Welsh language and a key part of Welsh identity, important for residents and the tourism sector alike. This gives it strong political significance.

Fisheries deserve a mention here too. The main catch is shellfish, much of which is exported to southern Europe, where it commands a higher price⁹. Once the UK leaves the EU it is still unclear how, or if, the fishing industry will be bound by the EU regulatory system, although either way will have limited impact on Welsh fisheries as most shellfish is exempt from quotas¹⁰.

The food industry is a bigger employer than farming but depends on it for many of its raw materials, and therefore its authenticity and branding. It is valued both for the jobs it provides, and the export income it generates, as well as its contribution to 'brand Wales'.

This is reflected in the PGI status of Welsh beef and lamb, Pembrokeshire Early Potatoes, West Wales coracle-caught sewin and Welsh wine. Other Welsh protected food names include Welsh Caerphilly cheese, traditional Welsh cider, Conwy mussels, Carmarthen ham, laverbread and Anglesey seasalt¹¹. Welsh food brands with links to local primary production include Rachel's Dairy and Llaeth y Llan (the Village Dairy), Puffin Produce (Pembrokeshire potatoes and other vegetables), Celtic Pride (beef) and Halen Môn (sea salt).

Statistics from Welsh Government¹² show two-thirds of employment related to food and farming is in catering, retail and wholesale with most of these employees working in small to micro businesses. Work in these industries can be insecure and seasonal, with employment increasing in busy tourist seasons or, in farming, picking seasons. With little investment in training, or value placed on staff retention, this continues to be a low-skilled sector with staff shortages at peak times.

Student enrolment on university degree courses for food science and technology is much lower than capacity, which could indicate this industry is not considered an aspirational career choice by school leavers. Welsh Government's Food and Drink Industry Board has recognised the skills and staffing gaps, and the potential for this to increase if migrant workers are reduced post-Brexit¹³. Working with industry it aims to raise the profile of the industry to recruit and train staff, starting with apprenticeships designed for specific sectors.

Meanwhile, a number of small food businesses are pioneering new products such as charcuterie, vegan Welsh cakes, seaweed products and fermented foods, supported by organizations and projects such as Food Centre Wales, the New Food

Entrepreneurs and Agora. These feature in the country's food festivals, of which the two biggest are the Abergavenny Food Festival and the Conwy Feast.

Lessons from a more diverse past

Farming in Wales has always been dominated by grass, but it was more varied in the past. In 1867 for instance there were around 300,000 hectares of land growing crops, but by 2004 this figure was less than 100,000¹⁴. Farms would have been producing grain for local use (including oats for horses), as well as vegetables, and small-scale pig and poultry production would have played an important role in the diet. There were also more orchards and woodlands.

Nowadays numerous initiatives are drawing on this past knowledge to see how Welsh farming might be diversified. They range from individuals and voluntary groups to large funded projects, and combinations of the two.

The Welsh Grain Forum, whose membership of about 60 includes cereal growers, plant breeders, brewers, thatchers, bakers and millers, and which is linked to the UK Grain Lab and the Traditional Cornmillers Guild, is working with the National Trust in Wales and with Aberystwyth and Bangor universities. The EU-funded project Tyfu Cymru is stimulating growth in Wales' commercial horticulture sector through training and development, working with the Fruit and Vegetables Alliance and Peas Please. It recently set up a fruit network. Menter Moch Cymru is encouraging pig production¹⁵. The Woodland Trust is promoting agroforestry, Social Farms & Gardens is supporting urban food growing, and the Welsh Perry and Cider Society protects Welsh orchards.

Other networks, such as the Landworkers' Alliance, Paramaethu Cymru (the Welsh arm

of the Permaculture Association) and One Planet Development are generically promoting an approach to farming based on small-scale experimentation that combines the knowledge and culture of earlier generations with international influences. Their members are pioneering micro-dairies, agroforestry and other knowledge-intensive methods.

These are all numerically very small projects, but some have considerable reach, notably the Social Farms & Gardens network which supports over 500 community food sites in Wales, reaching an estimated 6500 volunteers¹⁶. Collectively, they are an important source of ideas for future food production in Wales. The Welsh Government's support service for farming and rural communities, Farming Connect, is already sharing some of this good practice, with farmer events hosted by pioneering farms and smallholdings.

Policy potential

Agriculture, health and education are all devolved to the Welsh Government, giving it considerable power to shape the food system in Wales. However, although EU Rural Development Programme funding is paid directly from Brussels to Cardiff, an important consequence of Brexit will be to make Welsh agriculture dependent on grants from London, about which there is uncertainty. At present, the Welsh Government's agriculture and land management consultation, *Brexit and our Land*¹⁷, is proposing a system of payments to farmers that is different from the UK Government's *Health and Harmony*¹⁸ consultation and subsequent *Agriculture Bill*¹⁹. It consists of two parallel schemes, one rewarding farmers for the public goods they deliver and the other helping them to develop economic resilience. For a full discussion of this, see below.

The food industry is an important part of the Welsh economy and is also seen as having an influence on the nation's health. The relative emphasis of

these two aspects has shifted over the years: the 2010 strategy *Food for Wales*, *Food from Wales*²⁰ suggested an equal balance, whereas the 2014 *Action Plan Towards Sustainable Growth*²¹ was heavily biased towards job creation and exports. At present, both the Strategy and the Action Plan are being reviewed and there are hints that the focus might move back towards a broader view of the food industry, for instance linking it to skills and health.

But Wales also has some distinctive and quite radical pieces of legislation which are still finding their feet, but which could have powerful long-term effects. One is the *Well-being of Future Generations Act (Wales) 2015*²², which requires public bodies to consider the long-term consequences of their decisions and to collaborate in new ways with their stakeholders. Each local authority, for instance, has a *Public Services Board (PSB)* which includes representation from local businesses and community groups and is tasked with developing a well-being plan for the area. Food is an obvious aspect of well-being and the PSBs might in time become a route to developing stronger local governance of the food system, although the process is still very new.

Another is the *Environment (Wales) Act 2016*²³ which requires *Natural Resources Wales* to create 'Area Statements'. These will set out what sustainable management of natural resources means within a regional and local context and will be the evidence that will underpin a range of other national and local plans, including those of the PSBs. They will include cultural considerations such as a sense of place and will be an opportunity to involve the public in local planning, as laid out in the *Well-being of Future Generations Act*.

Meanwhile, the *One Planet Development*²⁴ legislation allows low-impact development in the countryside where applicants can demonstrate that they are able to meet a high proportion of their food and fuel needs directly from their plots. A high-profile example of this is *Lammas Ecovillage*²⁵ in Pembrokeshire, a collection of zero-carbon dwellings, with each household making their living from their land.

Other government initiatives that are relevant to food in Wales include an obesity pathway²⁶ and the Welsh Food Poverty Network,²⁷ set up in 2015. In education, a new school curriculum, Successful Futures²⁸, provides scope for new approaches to food education.

Grassroots initiatives

Wales has a strong tradition of grassroots action. In the 1970s, an influx of urban dwellers looking for the ‘good life’ in the rural west turned out to be an important strand in the development of the UK organic movement, and all over Wales there are rural and urban examples of food growing that lie outside the mainstream.

The Welsh Government has supported many of these new approaches, for instance funding Organic Centre Wales from 2000 to 2015. It has also given active support to community growing. Rural Affairs Minister Elin Jones launched the Community Grown Food Action Plan in 2010²⁹, inspired by a visit to Cuba, and since then the Federation of City Farms and Community Gardens (now Social Farms & Gardens) has received funding from the Rural Development Programme to develop an effective network of projects around Wales.

Many of its members are significant organizations in their own right, including Mach Maethlon, which is now training up new growers to sell to local markets in Machynlleth, Cultivate in Newtown which runs community allotments and sells produce through the town’s Market Hall, and the Riverside Community Market Association in Cardiff. Associated with the network are other initiatives such as the Community Land Advisory Service and the Community Supported Agriculture Network, and many of its members were involved in delivering the National Botanic Garden’s horticulture training project Growing the Future, now in its second phase.

Other civil society initiatives include Paramaethu Cymru (permaculture), Transition Towns (notably Fishguard, where a pioneering food surplus café

has given way to a community fridge), and Food Cardiff, a partnership between local government, academia, the health board and community groups, which is part of the Sustainable Food Cities project. Food Cardiff has had considerable success, notably in pioneering school holiday meal provision, and has set up a new charity, Food Sense Wales, to share its work more widely.

The Wales Food Manifesto

1. Everyone in Wales has access to high-quality, nutritious and safe food that maximises the health and wellbeing of citizens, communities, producers, processors and nature.
2. Food production and imports respect environmental limits, ensuring that the right of future generations to good food is ensured in perpetuity.
3. Each part of the food system minimises waste.
4. Shorter food supply chains enable farmers and community growers to supply citizens and public institutions with fresh and nutritious Welsh food.
5. Welsh farmers, fishers and growers are responding to local demands as well as serving export markets.
6. A clear line of action and consequence ensures that conditions for farmers, fishers, food workers, animal welfare, local communities and nature are improved by decisions made in the food sector.
7. Wales plays an active and responsible role in the global food system.
8. Government recognises and values the social, economic, environmental and cultural impacts of food.
9. Children leave school able to grow, cook, choose, buy and eat healthy food.
10. Everyone in Wales understands where their food comes from, and can enjoy growing, cooking and eating together.

The Wales Food Manifesto is a voluntary initiative that arose out of a project called Food Values³⁰ led by Aberystwyth and Bangor Universities in 2014-2016. The Manifesto, which was launched by Jane Davidson and Peter Davies in 2015, has 10 points and is intended to be an inclusive movement based on shared values. Its website³¹ carries a draft manifesto and articles from many different angles, including nutrition, farming, education, governance, industry and health.

Brexit process in Wales

The initial open consultation process for Welsh Government's agriculture and land management report, *Brexit and Our Land*³², closed at the end of October 2018. Welsh Government has committed to reviewing all responses received before re-issuing their proposed policy for a second round of consultation. The second report will include costings based on the most likely Brexit scenarios.

In keeping with the recent UK Government consultation, *Health and Harmony*³³ and proposed legislation³⁴, a payment scheme for 'public goods'³⁵ is proposed. The Welsh consultation proposes an additional payment stream for 'economic resilience'. Emphasis is on sustainable farming and land management with payments to promote activities such as flood risk reduction, cleaning and maintaining waterways, and encouraging tree planting and forestry.

Parallels are evident between the Welsh and UK Governments proposed policies, with both emphasising environmental sustainability and payments for outcomes rather than land ownership. This could be considered positive, as neighbouring farming practices impact on each other - at local and nationwide scales. Another consideration under review in Wales is the length of time payments are made for, with public goods in particular, considering the length of time some farming and land management practice takes to implement and see benefits from - running in generational cycles rather than as a short-term industry.

A view from the ground

At a Brexit and our Land consultation event hosted by Welsh Government in early October 2018, a Pembrokeshire farmer raised the point that the majority of farmers he knows voted to leave the EU but, in his words, 'didn't think it through or have any solutions'. Wales voted similarly to the UK national vote with 52.5% voting to leave. In keeping with UK-wide voting patterns most rural counties voted to leave, with Cardiff and a handful of other counties voting to remain.

As may be expected the mood in the room of the consultation event was at times hostile, with competing opinions about what changes should be made to land management and agricultural policy. Many voiced concerns that decisions taken now could make or break their sector, with the oft-heard phrase that this is 'a once in a lifetime opportunity'. The need for sympathetic policies across the devolved nations was summed up by one consultee: "farming doesn't have borders, what happens over there impacts over here".

Almost by way of a caveat the Welsh Government Environment and Rural Affairs spokesperson admitted that whilst the department is in regular contact with colleagues in Whitehall, it is little clearer than any of us in knowing what their agricultural budget will be, or when this will be agreed. The spokesperson added, Welsh Government has committed to ring-fence any budget it does receive and is lobbying for the budget to remain at least at current levels. The spokesperson also raised the need to keep the general population 'on side' with spending designated for the sector, especially in relation to payments for public goods.

It was evident from the number of different organisations which encouraged their supporters to respond to *Brexit and Our Land* that Welsh Government will have much to consider. Larger organisations had the opportunity to attend initial roundtable talks to inform the public consultation,

such as the farming unions and RSPB. Consultation response advice was issued by a number of large and smaller organisations, for example the Landworkers' Alliance, National Farmers Union Cymru³⁶, Farmers Union of Wales³⁷ and RSPB³⁸, amongst others. They represent stakeholders from across Wales with a variety of perspectives and lobbying power.

Brexit threats and opportunities

Of the potential negative Brexit outcomes, the most serious is the impact on export and import markets; this is of particular concern to farmers in Wales who export red meat and for those exporting seafood. Beef and lamb are significant production sectors in Wales, with the quantities produced vastly exceeding amounts consumed within Wales and the rest of the UK. Whilst in the UK we enjoy eating the prime cuts, the majority of Welsh meat is exported, much to Europe, and with the shellfish catch going to Spain, Portugal and France.

This growth has been encouraged by Welsh Government, with its food and drink policy focused on export markets³⁹. How a large export market will be maintained in the case of a no-deal Brexit is unclear. Fear of significant losses is a major concern for farmers, who worry that their businesses won't survive if they must wait for export trade deals to be negotiated.

Of equal concern is the impact on imported produce, as Wales is dependent on fruit and vegetables from elsewhere. With relatively little land used for horticulture and vegetable growing, Wales would be vulnerable to price rises and supply chain delays. However, recent research⁴⁰ indicates the potential for Wales to meet the needs of the population by increasing the land use from 0.1% to 2% for fruit and vegetable production. Problems with supply and price rises could provide motivation for more land in Wales to be used for horticulture and vegetable growing.

Welsh agriculture can regroup and rise to these challenges, but it will be crucial to form new alliances to support farming, the food chain and their associated industries.⁴¹ New approaches have in fact been developing 'under the radar' for many years, and they have been given new credibility by the discussions forced by Brexit. We make some recommendations below which pick up on these new ideas and show how they fit together to make a step change in food policy.

Full recommendations

1. Support farming that has positive environmental outcomes

Public funding must be for farming that integrates food production with care for the environment, including support for biodiversity, carbon capture, flood mitigation, water quality and so on. There should be no public funding for environmentally destructive land management practices, and thought should be given to protecting Welsh producers from cheap imports from countries with lower standards of environmental, health and safety, labour rights and animal welfare.

2. Support individual farmers to revitalize the sector

Subsidy should be based on what farmers do, not how much land they manage, with no minimum area requirement. Young people should be supported to establish land-based livelihoods by removing barriers such as access to land and high start-up costs. This could mean a National Land Bank providing zero- or low-interest mortgages to new entrants and struggling farmers, supporting tenant farmers to purchase the land they farm, and buying up land to rent at cheap rates to small-scale sustainable farms. As farmers hold a great deal of knowledge about their own land, they should be encouraged to share this with others through a programme of mentoring, skill shares and apprenticeships. More research should be carried out on farms.

3. Support for farming should widen the definition of public goods

The standard line is that food is not a public good, because a market exists for it. Nevertheless, it is widely felt that public health and the existence of a vibrant food culture, including a food industry which provides satisfying and skilled employment, is of great benefit to society in general and should be supported from public funds. This could mean public support for infrastructure that enables short supply chains, such as mobile abattoirs, farmers' markets, food hubs and Community Supported Agriculture schemes. Deciding which initiatives are deserving of support and what criteria should be used will not be straightforward, but the debate will make a valuable contribution to our understanding of ourselves as a nation.

4. Support for farming should leave room for local self-direction

Top-down prescription by government risks producing a lifeless and bureaucratic approach that stifles local initiative. Instead, the emphasis should be on outcomes, and local areas should be given some freedom to experiment and shape their own futures, building local trust and new relationships grounded in a sense of place. This will mean increasing collaboration between farmers, other businesses, environmental organisations and public sector bodies, and the Public Services Boards could be a starting point for this.

5. Align farming with public health and environment

Agricultural and food policy should be focussed on meeting the nutritional needs of the people of Wales. Currently Welsh agriculture mainly produces red meat and dairy products, whereas public health services encourage people to eat more fruit and vegetables. A sustainable diet is generally considered to mean one with a high proportion of plant-based foods⁴². Because of its climate and soils Wales is better at growing grass than arable crops, but there is scope for diversifying into cereals and horticulture⁴³ in low-lying areas and to

some extent within towns and cities. Support for farmers and growers to experiment with these new approaches is vital.

6. Make more use of public procurement

The spending power of the public purse - £74.4m annually - should be used where possible to support the transition to a more diversified agriculture and a thriving food industry. There are already good examples in Wales of schools, hospitals, government offices and others that are doing this. This will mean above all investment in recruiting senior procurement staff, as advocated by Prof Kevin Morgan in his 2015 Senedd paper Good Food for All⁴⁴. A report from the National Assembly's inquiry into 'rethinking food in Wales' published in May⁴⁵ makes the same point.

7. Strengthen public education

Public engagement with food and farming is highly desirable for many reasons: for better understanding of the food system, including the need for taxation to support farming; for health and exercise; for community links; and to build local partnerships that can direct the future of food and the environment in a way that serves the needs of the locality. A link with the Public Services Boards and Environment Act 'Area Statements' progress could be very helpful here. It will not be so easy to integrate the food industry with such groupings, especially the supermarkets whose loyalty tends to be to their head offices rather than local communities, but this might develop in time. If more value comes to be put on local resilience and self-determination, perhaps in reaction to global shocks, this could be an idea whose time has come. It should begin in schools.

8. Reduce food waste

Along the food chain, from farmer, packaging manufacturer to supermarket employee, none want to see their time and resources wasted. From an environmental perspective we cannot afford this waste either. The Waste and Resources Action Programme (WRAP) supports the food

industry with its Courtauld Commitment 2025 programme⁴⁶, aiming ‘to cut the carbon, water and waste associated with food & drink by at least one-fifth in 10 years.’ Government policies and procurement related to food and drink should also consider how to make best use of food to minimise waste and embody the food waste hierarchy. A new food system could be created to ensure a wasteless system, moving to a circular economy model. A growing network of Community Fridges⁴⁷ demonstrates that surplus food can be used to power community regeneration, not simply plug gaps in the welfare state.

9. Frame food as more than a commodity

All too often, food is seen as a mere commodity, to be traded and sold for the benefit of the economy. It is time to see it first and foremost as the basis of good health, and a human right, as well as a social connector and our link with the natural world. This means taking a holistic view of food, one which recognizes the economic aspects but places them in service to human well-being. In this view, investment in a healthy food system brings benefits that go far beyond the nutritional, helping to create a happier society, maintain skills and traditions, and balance human activity with the natural world⁴⁸. Food is a social connector: it connects people to place and maintains traditions, and sharing food brings people together.

10. Establish a national civil society food network

Wales would benefit from a national body, based around the shared values of the Food Manifesto⁴⁹, which would join up silos and interest groups and look for fresh opportunities. Working with Welsh Government, this could ensure better links between policy areas. Another important role for such a network would be geographical integration, making the links between north and south, rural and urban, terrestrial and marine. Each draws on the unique strengths of its home patch and makes its own contribution, and all could be strengthened by sharing experiences and ideas amongst

themselves, as well as inspiring other communities to come up with their own ideas.

Conclusion

Brexit gives Wales an opportunity to make a step-change into a new approach to food and farming. This will only happen if there is a wholesale realignment of all those involved with the food system, and a willingness to see ourselves differently. Old oppositions, such as that between food production and wildlife, or between supermarkets and community initiatives, must be re-examined and transformed. Farmers will need to become confident experimenters as well as the guardians of tradition, the food industry – including supermarkets – will need to develop a closer links with the public as citizens rather than consumers. Above all, we will need to bring back more trust and respect to the vital business of feeding a nation. It is a lot to ask, but we think the time is right for a bolder vision.

Acknowledgements

The authors wish to thank Dr Pamela Mason, Holly Tomlinson and Tom Latter for contributions and comments on the draft paper.

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The Food Brexit Briefing series explores the implications of Brexit for the UK food system. It is produced by the Food Research Collaboration, which brings together academics and civil society organisations from across the food system to explore food and the public interest, with a particular emphasis on public health, the environment, consumers and social justice. The series provides informed reviews of key food issues likely to be – or already – affected by Brexit decisions. Recommendations are made for public debate.

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ISBN: 978-1-903957-48-6

Jane Powell and Corinne Castle. Brexit and Wales: A fresh approach to food and farming?. Food Research Collaboration Food Brexit Briefing.

contact@foodresearch.org.uk

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