



House of Commons
Welsh Affairs Committee

Brexit: priorities for Welsh agriculture

Second Report of Session 2017–19

*Report, together with formal minutes relating
to the report*

*Ordered by the House of Commons
to be printed 3 July 2018*

The Welsh Affairs Committee

The Welsh Affairs Committee is appointed by the House of Commons to examine the expenditure, administration, and policy of the Office of the Secretary of State for Wales (including relations with the National assembly for Wales).

Current membership

[David T. C. Davies MP](#) (*Conservative, Monmouth*) (Chair)

[Tonia Antoniazzi MP](#) (*Labour, Gower*)

[Chris Davies MP](#) (*Labour, Brecon and Radnorshire*)

[Geraint Davies MP](#) (*Labour (Co-op), Swansea West*)

[Glyn Davies MP](#) (*Conservative, Montgomeryshire*)

[Paul Flynn MP](#) (*Labour, Newport West*)

[Simon Hoare MP](#) (*Conservative, North Dorset*)

[Susan Elan Jones MP](#) (*Labour, Clwyd South*)

[Ben Lake MP](#) (*Plaid Cymru, Ceredigion*)

[Anna McMorrin MP](#) (*Labour, Cardiff North*)

[Liz Saville Roberts MP](#) (*Plaid Cymru, Dwyfor Meirionnydd*)

Powers

The Committee is one of the departmental select committees, the powers of which are set out in House of Commons Standing Orders, principally in SO No 152. These are available on the internet via www.parliament.uk.

Publication

Committee reports are published on the Committee's website at www.parliament.uk/welshcom and in print by Order of the House.

Evidence relating to this report is published on the [inquiry publications page](#) of the Committee's website.

Committee staff

The current staff of the Committee are Kevin Maddison (Clerk), Ed Faulkner (Second Clerk), Anna Sanders (Inquiry Manager), Rhiannon Williams (Committee Specialist), Susan Ramsay (Senior Committee Assistant), Kelly Tunnicliffe (Committee Assistant), George Perry (Media Officer) and Ben Shave (Media Officer). For this report they were assisted by Stephen Aldhouse (Committee Specialist).

Contacts

All correspondence should be addressed to the Clerk of the Welsh Affairs Committee, House of Commons, London SW1A 0AA. The telephone number for general enquiries is 020 7219 8363; the Committee's email address is welshcom@parliament.uk.

Contents

1	Introduction	3
2	The importance of Welsh agriculture	4
3	Priorities for UK-EU negotiations	5
	Future UK-EU trade	5
	Geographic indicators	7
4	Responsibility for agricultural policy	9
	The European Union (Withdrawal) Bill	10
	UK-wide common frameworks	11
	What common frameworks will look like	13
	Role in future trade deals	14
5	Agricultural policy post-Brexit	16
	Future policy	16
	Aims of future agricultural support payments	18
	The distribution of funds for agricultural support	19
6	Productivity, promotion and procurement	22
	A strategy for supporting and promoting Welsh agriculture	22
	Productivity	22
	Identifying future trade opportunities	23
	Marketing and promotion	23
	Meeting labour needs	23
	Conclusion	24
	Protecting health and welfare standards in new trade agreements	24
	The red meat levy	25
	Public procurement	26
	Conclusions and recommendations	28
	Formal minutes	33
	Witnesses	34
	Published written evidence	36
	List of Reports from the Committee during the current Parliament	37

1 Introduction

1. The UK's membership of the EU has shaped all aspects of agricultural life in Wales, from the system of subsidy and rural development under the Common Agricultural Policy (CAP) to the protections that exist for agricultural produce such as Welsh lamb and Conwy Mussels. The EU is also the prime destination for international exports of Welsh agricultural produce, providing the market for over 80% of food and animal exports.¹ The United Kingdom's decision to leave the European Union will, therefore, have significant implications for the agricultural industry and wider food sector in Wales.

2. Given the importance of agriculture to the Welsh economy, and the many questions Brexit raises about future agricultural policy for Wales, in March 2017 our predecessor Committee launched an inquiry examining agriculture in Wales after Brexit.² This work was curtailed by the 2017 General Election, but when this Committee was re-established after the election we decided to continue our predecessor's scrutiny of the impact of Brexit on Wales, looking in particular at agriculture.³

3. To inform our work we have taken evidence from a range of organisations and representatives of the farming community and agricultural sector in Wales, as well as ministers of the UK and Welsh Governments.⁴ We also heard the views of Welsh farmers in an open meeting at the Royal Welsh Agricultural Society Winter Fair at Builth Wells.⁵

4. This Report sets out what we see as the key issues for Welsh agriculture post-Brexit, and calls on the UK Government to respond to these, minimising any adverse impacts of Brexit, and maximising opportunities for the sector. Our Report sits alongside a separate publication which presents the views of those we heard from in their own words, and highlights the areas where they saw risks and opportunities.⁶

5. While this Report represents the views of the majority of the Committee, there are a wide range of views on the Committee regarding Brexit, the UK's future relationship with the EU, and the direction of agricultural policy in Wales. We recognise that there are also contrasting views across the agricultural community in Wales, and within the UK Government. In this Report we have sought to reflect the wide range of views we have heard throughout the course of our inquiry, and identify key priorities and, as far as possible, areas of common ground.

1 National Assembly for Wales, [Research Briefing: The Red Meat Sector](#), November 2017, page 7

2 Welsh Affairs Committee, ['Agriculture and Brexit inquiry launches with visit to Dolgellau'](#), 16 March 2017

3 Welsh Affairs Committee, ['Brexit's impact on agriculture, trade, and the repatriation of powers inquiry launched'](#), 21 September 2017

4 A full list of the Committee's evidence is available on pages 34–36.

5 Welsh Affairs Committee, ['Royal Welsh Agricultural Society Winter Fair hosts Brexit impact discussion'](#), 23 November 2017

6 This is available here: [Brexit and Welsh agriculture - views of the industry](#)

2 The importance of Welsh agriculture

6. The agricultural sector in Wales is uniquely important in terms of its economic and social significance, and is central to community life in rural areas. The sector is a significant contributor to the Welsh economy and job market—in 2015 agriculture contributed £406 million (Gross Value Added) to the Welsh economy,⁷ and accounted for around one in 25 jobs in Wales—more than twice the figure for the UK as a whole.⁸ The industry is particularly important to the economies of rural regions; for example, in Mid Wales the sector accounts for more than one in 10 jobs.⁹

7. Welsh agriculture is structured very differently to other parts of the UK: average farm holdings are 48 hectares, smaller than in England and Scotland, and 80% of agricultural land is in ‘less favourable areas’,¹⁰ where there are inherent natural challenges to farming the land. The red meat industry is a fundamental component of the Welsh economy: Welsh lamb is a flagship product, and its export across Europe is beneficial to the Welsh economy and focuses international attention on Wales and Welsh produce.¹¹ Moreover, agricultural businesses and associated supply chains provide the foundation for the Welsh language to be used as part of everyday commerce and trade.¹²

8. Agriculture is central to community life in rural Wales and the health of the Welsh language, and is at the heart of long-standing and complex supply chains which underpin the rural economy in Wales. It is also a significant contributor to the Welsh economy and job market—accounting for a higher proportion of jobs and economic value in Wales than it does for the UK as a whole. The red meat industry in Wales—and the flagship product of Welsh lamb in particular—is of singular importance to Welsh agriculture and the Welsh brand.

9. *In preparing for Brexit the UK Government must recognise the specific and unique circumstances of agriculture in Wales. These include the extent to which local communities and economies rely on relatively small farms and the supply chains that support them. Throughout this Report we highlight a number of specific ways in which the Government can respond to the particular needs of Wales.*

7 Department for Environment, Food and Rural Affairs, [Agriculture In the United Kingdom 2016](#), 2017, Table 3.2: Summary measures by country at current price, page 22

8 Ibid

9 Statistics for Wales, Statistical bulletin, [Workplace employment by industry in Wales, 2001 to 2016](#), 29 November 2017, Chart 8: Percentage of workplace employment by industry and Welsh local authority, 2016, page 17

10 Q168 [Glyn Roberts], National Assembly for Wales, Research Briefing, [The Farming Sector in Wales](#), September 2016, page 7

11 Q172 [John Davies]

12 Q97 [Glyn Roberts]

3 Priorities for UK-EU negotiations

Future UK-EU trade

10. The vast majority of international exports of Welsh agricultural produce go to EU nations. Over 80% of food and animal exports, including over 90% of exports of meat, dairy and eggs, and animal feed, go to the EU.¹³ Currently the trade of agricultural produce between Wales and the EU is facilitated by the UK's membership of the Single Market and Customs Union, which remove all tariffs, customs and regulatory barriers to the movement of goods.

11. Post-Brexit, there is a range of possible outcomes for the UK's future trading relationship with the EU, and negotiations between the UK and EU are ongoing. It therefore remains to be seen what the future UK-EU trade relationship will look like, and what this will mean for the agricultural sector. The UK and EU have agreed in principle to a transition, or implementation, period which means that current trading arrangements are expected to continue until 31 December 2020.¹⁴

12. We heard varying interpretations of the potential impact, on different sectors within Welsh agriculture, of changes to UK-EU trade relations. For the most part, the evidence we heard expressed substantial concern about the impact of Brexit, particularly in relation to the export of lamb.¹⁵ The concern of the industry is that, on leaving the EU, the imposition of tariffs could make it impossible to export to key EU markets.¹⁶ We heard, for example, that if the UK were to trade with the EU using the Common External Tariff, effective tariffs of 84% could be applied to cattle carcasses, 46% on lamb carcasses, 61% on cuts of lamb and tariffs of between 43%-50% on pig meat.¹⁷ Gwyn Howells, Chief Executive at Hybu Cig Cymru—the industry body responsible for the development, promotion and marketing of Welsh red meat—told us: “what we must avoid at all costs is reverting to WTO rules or tariffs on sheep meat because our exports would be decimated.”¹⁸ These concerns were brought into even sharper relief by the suggestion that lamb from Spain and Romania is already displacing Welsh lamb in some parts of the EU market.¹⁹

13. The concerns we heard were reflected by many of our witnesses stating that they would be best served by retaining access to key EU markets with no new tariff and customs barriers.²⁰ Lesley Griffiths AM, the Welsh Government's Cabinet Secretary for Energy, Planning and Rural Affairs, told us that, in her discussions with stakeholders, the message which had come through was that they were very concerned about the possibility of tariffs on trade with the EU, and wanted “unfettered access to the single market”.²¹

13 National Assembly for Wales, Senedd Research, [Understanding Welsh exports: a look at the latest Regional Trade Statistics](#), June 2017

14 Department for Exiting the European Union, [Draft Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland from the European Union and the European Atomic Energy Community](#), 19 March 2018

15 Q134 [John Davies], Q504 [Cennydd Jones]

16 Q130 [John Davies], Q190 [Gwyn Howells], [NFU Cymru](#) (AGR0013) para 26

17 Hybu Cig Cymru, [Challenge and Change Brexit and the Welsh Red Meat Industry](#), Figure 2: Likely effective EU tariff rates under WTO rules, page 7. Tariffs are a combination of additional sums charged as a proportion of the value of the product and fixed amounts paid per unit (usually by weight). In combination this produces an effective ad valorem rate.

18 Q190 [Gwyn Howells]

19 Q187 [Gwyn Howells], see also data published by the [Agriculture & Horticulture Development Board](#) (November 2017) analysing increased Romanian sheep meat production.

20 Q157 [Glyn Roberts], Q513 [Laura Elliott]

21 Q568

14. While there was universal concern about the future of lamb exports post-Brexit, we were told that the imposition of tariffs on imports of agricultural produce to the UK market could make the smaller but still important Welsh beef and pork sectors—where the UK is currently a net importer—more attractive on the domestic market.²² The Environment, Food and Rural Affairs Committee has also considered this issue, and heard that the process of replacing imported meat with domestic produce would not be swift,²³ because rearing additional cattle “from conception to killing” would take a minimum of two years.²⁴ We note there would also be a delay to increasing production for nations seeking to export more agricultural produce to the UK, should the UK agree preferential trade deals with those countries.

15. It is not just the potential imposition of tariffs that will determine the sale of agricultural produce from Wales to the EU post-Brexit. We met with officials from the Irish Government who were clear that non-tariff barriers such as customs and veterinary checks would be necessary in the absence of a customs union or agreement on agricultural standards between the UK and the EU. In evidence submitted to our predecessor committee, NFU Cymru underlined the challenge these types of barriers would create, saying that producers of perishable goods “cannot afford to see their produce held up at international borders by red-tape and bureaucracy.”²⁵

16. The UK Government has not yet set out its preferred option for future trade relations with the EU, but George Eustice MP, Minister of State for Agriculture, Fisheries and Food, told us that he would be “supporting Welsh agriculture by arguing passionately for a free trade agreement and a customs agreement that mean we can have frictionless borders and tariff-free trade across the board, including in those sectors that are important to agriculture”.²⁶ Asked whether he would support membership of the Customs Union and Single Market if this was the only way to achieve frictionless and tariff-free trade, the Minister for Agriculture told us:

I don’t think it is the only way it can be achieved. As you will all be aware, it is a very live discussion at the moment—the nature of a customs partnership or a customs agreement. A cross-Government deliberation is going on at the moment about what that partnership or agreement should look like. We have been clear that you do not need to be in a customs union to have frictionless trade, nor, indeed, to have tariff-free trade.”²⁷

17. The EU is the main market for exports of Welsh agricultural products; it is the destination of over 80% of Welsh food and animal exports, including over 90% of meat, dairy, egg and animal feed exports. Barrier-free access to EU markets is therefore essential to the future of Welsh agriculture. The majority of our witnesses, including the Welsh Government, believed this would best be met by continued membership of the Single Market and Customs Union, but we note that there are many different options for future trade relations between the UK and EU, and that the UK Government believes it is possible to achieve frictionless borders and tariff-free trade through a free trade and customs agreement. Whatever the UK’s future trade relationship with the EU, it must reflect the market access needs of Welsh farmers.

22 Q184 [Gwyn Howells]

23 Environment, Food and Rural Affairs Committee, Third Report of Session 2017–19, [Brexit: Trade in Food](#), HC 348, para 44

24 Ibid

25 [NFU Cymru](#) (AGR0013) para 28

26 Q492

27 Q493

18. *In formulating its preferred vision for future UK-EU trade relations, the UK Government should recognise that the overwhelming view of the representatives we heard from was that they would be best served by retaining membership of the Single Market and Customs Union, in order to ensure current access to EU markets with no new barriers—be they in the form of tariffs, customs controls or other checks.*

Geographic indicators

19. The European Union’s systems of Protected Geographic Indicators (PGIs) and Products of Designated Origin (PDOs)—which are used to protect the name and provenance of certain food and drink products—underline the quality and protect the status of Welsh produce.²⁸ PGIs and PDOs give protected status to the marketing and sale of agricultural produce, and we have heard that these designations have been the foundation of the export across the EU of produce such as Welsh lamb and beef, Anglesey sea salt and Welsh laverbread. Glyn Roberts, President of the Farmers Union of Wales, told us that the protected status of Welsh lamb and Welsh beef was of “paramount importance”, and that the status of Welsh lamb was particularly important in terms of exporting to France and Italy.²⁹ If these products were no longer protected post-Brexit, there would be a risk that producers in other countries could produce imitation products using Welsh product names, creating unfair competition for genuine Welsh produce. The Welsh Government Cabinet Secretary told us that protected food names were important to the companies that have them, and that she wanted to see these protections continue post-Brexit.³⁰

20. We heard that there was widespread support across Welsh agriculture for the retention of geographic indicators post-Brexit,³¹ and that this would be important in maintaining business continuity and demonstrating that Brexit had not led to any diminution of standards. The Government has said that it will establish a UK-wide Geographical Indications (GI) scheme which will enable recognition from the EU scheme. It expects that “all current UK GIs will continue to be protected by the EU’s GI schemes after we leave the EU.”³² That said, the UK Government has not agreed to the EU’s proposals for dealing with geographical indicators,³³ which were included in the draft withdrawal agreement.

21. The European Union’s system of Protected Geographic Indicators (PGIs) and Products of Designated Origin (PDOs) protects the provenance and underlines the quality of Welsh produce. This has been particularly important for Welsh lamb, where its status has been the foundation for its export across the EU. Facilitated by these protections, Welsh agricultural produce has been exported across the EU, benefitting the Welsh economy and focusing international attention on Wales and Welsh produce.

28 PGI is open to products which must be produced or processed or prepared within the geographical area and have a reputation, features or certain qualities attributable to that area. PDO registration describes products having characteristics resulting essentially from the geographical area and the know-how of the producers in the area of production. E.g. Anglesey Sea Salt and Conwy Mussels.

29 Q172

30 Q576

31 Q172 [John Davies]

32 [PQ128186](#) [on Food: Origin Marking], 19 February 2018

33 Department for Exiting the European Union, [Draft Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland from the European Union and the European Atomic Energy Community](#), 19 March 2018. The UK Government has marked up the draft withdrawal agreement produced by the EU, indicating where text has been agreed between negotiators, where a policy objective has been agreed but text needs to be agreed, and where there is no agreement and discussions are ongoing. The text relating to geographical indicators is in the latter category.

22. The Government must ensure that future arrangements for geographic indicators lead to no reduction in protection for agricultural producers, and that Welsh producers can enjoy continued recognition by the EU's system of Protected Geographic Indicators.

4 Responsibility for agricultural policy

23. Under the current devolution settlement agriculture is a devolved matter, meaning it is the responsibility of the Welsh Government.³⁴ However, the devolved administrations cannot pass legislation which is incompatible with EU law,³⁵ and the EU’s substantial role in agricultural policy—particularly through the Common Agricultural Policy—has meant that in practice agricultural policy has largely been made by the EU, and implemented by the UK and Welsh Governments. This means that the UK’s departure from the EU will require provisions to be made to reflect the ending of the supremacy of EU law, and the repatriation of responsibility for areas of policy which have previously sat with the EU.

24. The Welsh Government has been clear that, post-Brexit, agricultural policy should remain devolved and be the responsibility of the Welsh Government. The Welsh Government Cabinet Secretary told us that agriculture had been a devolved area of responsibility for almost 20 years, and that she did not think the referendum had been a vote on changes to the devolution settlement.³⁶ In its paper on Brexit and Devolution the Welsh Government said that any attempts by the UK Government to reverse the devolution settlement in this area would be “vigorously opposed by the Welsh Government”.³⁷

25. The UK Government has recognised that Brexit will result in powers returning from the EU to the devolved administrations. In February 2018 the Secretary of State for the Environment, Food and Rural Affairs, Rt Hon Michael Gove MP, said that, post-Brexit, there would be “the maximum level of devolution to ensure that policy fits the needs of individual nations of the United Kingdom.”³⁸ When questioned about what this would mean in practice, the Minister for Agriculture told us that agriculture would be devolved, saying:

We see agriculture policy—the design of the schemes—and anything that might replace the existing common agricultural policy, both pillar 1 and pillar 2, as being a devolved policy area.³⁹

26. Our witnesses agreed that the Welsh Government should have the ability to tailor agricultural policy so that it met the needs of Wales,⁴⁰ but it was also acknowledged that there were areas where a UK approach would be sensible, and that the systems of governance which currently exist at an EU level would need to be replicated at a UK level.⁴¹ We look at these issues below, when we consider arrangements for UK-wide common frameworks.

34 [Government of Wales Act 2006](#), Schedule 7 (as amended by the [Wales Act 2017](#))

35 [Government of Wales Act 2006](#), Clause 108 (6) (c)

36 Q543

37 Welsh Government, [Brexit and Devolution: Securing Wales’ Future](#), January 2017

38 Department for Environment, Food and Rural Affairs, [“A Brighter Future for Farming”](#), 20 February 2018

39 Q433

40 Q515 [Cennydd Jones, Dafydd Jones]

41 Q515 [Laura Elliott], Q127 [Huw Thomas], Q129 [Glyn Roberts]

The European Union (Withdrawal) Bill

27. Although there appears to be agreement in principle that agricultural policy will be a devolved area of responsibility post-Brexit, there has been substantial disagreement between the UK Government and devolved administrations about the legislation—the European Union (Withdrawal) Bill—which the UK Government has brought forward to provide for the UK’s withdrawal from the EU.

28. The UK Government introduced the European Union (Withdrawal) Bill in July 2017 to provide a statutory basis for the UK’s withdrawal from the EU, and to provide for the repatriation of powers from Brussels. The Bill as introduced would have removed the requirement for devolved legislation to be compatible with EU law, but would also have created a new restriction on the competence of devolved legislatures so that, in the first instance, only the UK Parliament would be able to legislate in areas which had previously been within the competence of the EU.⁴²

29. Shortly after the Bill was introduced, the Scottish and Welsh Governments stated that they would not be able to consent to the Bill as it stood, largely because of the legislative constraints on areas of policy returning from the EU.⁴³ The two governments proposed a number of amendments to the Bill, which would remove these constraints and limit the ability of UK ministers to make secondary legislation in devolved areas.⁴⁴ Carwyn Jones AM, the First Minister of Wales, said that the Bill represented a “fundamental assault on devolution” by creating a “new set of constraints in devolved competences that would be controlled by the UK Government”.⁴⁵

30. Following extensive discussions between the two governments—and the passage of a “Continuity Bill” by the National Assembly,⁴⁶ as a contingency measure—on 24 April 2018 the Welsh Government announced that it had reached an agreement with the UK Government over the provisions of the Withdrawal Bill.⁴⁷ The result of the agreement between the UK and Welsh Governments is set out below.

Box 1: Agreement between UK and Welsh Governments on the European Union (Withdrawal) Bill

All devolved powers and policy areas remaining devolved, unless they are specified to be “temporarily held” by the UK Government—these will be areas where there is a need for common, UK-wide rules.

The UK Government will seek the consent of the devolved legislatures on which areas of current EU law will be “frozen” while common UK-wide rules—known as common frameworks—are agreed.

A “sunset” clause that guarantees the “freezing” of powers will be temporary.

Any regulations made by the UK Government on policy areas they temporarily hold would expire after five years.

Source: Welsh Government, [‘Welsh Government agrees deal on Brexit Bill that respects devolution’](#), 24 April 2018

42 [European Union \(Withdrawal\) Bill](#), Clause 11 (2) [Bill 005 (2017–19)]

43 Welsh Government, [‘First Minister takes step to protect Wales post-Brexit’](#), 12 September 2017, Scottish Government, [‘The European \(Withdrawal\) Bill’](#), 12 September 2017

44 Welsh Government, [‘Written Statement - European Union \(Withdrawal\) Bill’](#), 19 September 2017

45 Welsh Government, [‘Written Statement - EU \(Withdrawal\) Bill’](#), 16 January 2018

46 Welsh Assembly, [Law Derived from the European Union \(Wales\) Act 2018](#)

47 Welsh Government, [‘Welsh Government agrees deal on Brexit Bill that respects devolution’](#), 24 April 2018

As a result of the agreement, it is understood that the Welsh Government will be withdrawing its “Continuity Bill”.⁴⁸ The Welsh Government Cabinet Secretary told us that she did not expect many areas of policy would need to be subject to the “freezing” powers, and that the Welsh Government planned to make sure they were ready to go with their own agricultural policy.⁴⁹

31. David Lidington MP, the Minister for the Cabinet Office, welcomed the agreement between the Welsh and UK Governments, saying it was a “significant achievement that will provide legal certainty, increase the powers of the devolved legislatures and also respect the devolution settlements.”⁵⁰ On 25 April the Government published amendments to the Bill, and a related intergovernmental agreement and memorandum of understanding.⁵¹

32. The UK and Scottish Governments are yet to reach an agreement on the areas of the EU (Withdrawal) Bill which affect Scotland’s devolution settlement.⁵²

33. We recognise the agreement between the UK and Welsh Governments on the approach of the European Union (Withdrawal) Bill to responsibility for areas of agricultural policy which will return to the UK post-Brexit. It is essential that any changes to the devolution settlement for Wales which result from Brexit are agreed with the Welsh Government, and not imposed by Westminster. It is regrettable that it took so long for this agreement to be reached.

UK-wide common frameworks

34. In parallel to discussions about the European Union (Withdrawal) Bill, there has been debate about the extent to which it will be necessary or desirable to have common UK-wide approaches (often referred to as common frameworks) for areas of policy where EU policy has previously provided for a consistent approach across the UK.

35. There is broad agreement that, post-Brexit, it will be desirable to have UK-wide frameworks for various areas of policy where the UK’s membership of the EU means that policy is currently uniform across the UK. Huw Thomas, Political Adviser at NFU Cymru, told us that common frameworks would be necessary for the functioning of the internal market, and also to enable new free trade agreements to be made.⁵³ Glyn Roberts, President of the Farmers Union of Wales, agreed, telling us that large variations in approach across the UK would lead to market distortion.⁵⁴ The Welsh Government has also accepted the need for common frameworks post-Brexit, saying:

We recognise that in some cases, in the absence of EU frameworks which provide an element of consistency across the UK internal market, it will be essential to develop new UK-wide frameworks to ensure the smooth working of the UK market.⁵⁵

48 HC Deb, [HCWS646](#) [on European Union (Withdrawal) Bill and Devolution: Update on Clause 11], 25 April 2018, [Written statement]

49 Q547

50 Cabinet Office, ‘[UK and Welsh governments reach agreement on EU Withdrawal Bill](#)’, 25 April 2018

51 Cabinet Office, ‘[Government amendments to Clause 11 of the EU Withdrawal Bill](#)’, 25 April 2018, Cabinet Office, ‘[Intergovernmental Agreement on the European Union \(Withdrawal\) Bill](#)’, 25 April 2018

52 Scottish Government, ‘[Update on Brexit talks](#)’, 2 May 2018

53 Q124

54 Q124

55 Welsh Government, [Securing Wales’ Future, Transition from the European Union to a new relationship with Europe](#), 2017, page 26

36. In October 2017 the Joint Ministerial Committee (European Negotiations)—which brings together ministers of the UK Government and devolved administrations to discuss matters relating to the UK’s departure from the EU—agreed that common frameworks would be established where they were necessary to enable the functioning of the UK internal market, ensure compliance with international obligations, ensure the UK can pursue trade agreements, enable the management of common resources, administer and provide access to justice, and safeguard the security of the UK.⁵⁶ The Joint Ministerial Committee agreed that the frameworks would respect the devolution settlements and the democratic accountability of the devolved legislatures.

37. In February 2018 the Department for Environment, Food and Rural Affairs (Defra) published a command paper and consultation, *Health and Harmony: the future for food, farming and the environment in a Green Brexit*,⁵⁷ which outlined the Government’s intentions around the establishment of common frameworks, and asked what areas should be included in the common framework for agriculture. This stated:

In line with the principles underpinning the creation of common frameworks agreed by the Joint Ministerial Committee (EU Negotiations), frameworks will be established where they are necessary in order to enable a well-functioning internal market across the United Kingdom, compliance with international obligations and protection of our common resources. Together, we are confident that we can determine frameworks with the right mix of commonality and flexibility. It is the government’s expectation that the process will lead to an increase in decision-making powers for each of the devolved administrations.⁵⁸

The paper said that the UK Government and the devolved administrations had “made good progress on identifying where a common approach may be needed”.⁵⁹ The Minister for Agriculture confirmed to us that “the two principal areas where everybody agrees that there need to be frameworks are, first, those that pertain to international negotiations—international trade agreements, for instance—and, secondly, those necessary to protect the integrity of the UK internal market.”⁶⁰

38. The UK Government has analysed areas of EU law that intersect with devolved competences, and set out where it believes common frameworks will be required. In the agricultural sector, this includes:

- a) Areas where non-legislative common frameworks may be required: environmental standards.
- b) Areas that are subject to more detailed discussion to explore whether legislative common framework arrangements might be needed: agricultural support, marketing and certification of agricultural produce, animal health and welfare, food labelling.

56 Cabinet Office, [Joint Ministerial Committee communiqué: 16 October 2017](#), 16 October 2017

57 Department for Environment, Food and Rural Affairs, [Health and Harmony: the future for food, farming and the environment in a Green Brexit](#), Cm 9577, February 2018

58 Executive summary, para 7

59 Department for Environment, Food & Rural Affairs, [Health and Harmony: the future for food, farming and the environment in a Green Brexit](#), Cm 9577, February 2018, page 60

60 Q433

- c) Policy areas that the UK Government believes are reserved: protected names for agricultural produce.⁶¹

The Minister for Agriculture indicated that the forthcoming Agriculture Bill—expected in the second half of 2018—while focusing on England, might have UK-wide implications for some areas, but told us that he expected the Welsh Government would agree with the areas where the Bill took a UK-wide approach.⁶²

39. It is clear that, post-Brexit, UK-wide common frameworks will be required in some areas of devolved policy, to ensure there are no barriers within the UK market, that the UK is in compliance with international obligations and that the UK’s common resources are protected. We welcome the agreement between the UK Government and devolved administrations about the areas where these will be necessary.

What common frameworks will look like

40. Although there is agreement that common frameworks will be required in some areas, it is not yet clear what these will look like or how they will operate. Huw Thomas, Political Adviser at NFU Cymru, suggested that there were a number of different approaches which could be used to establish them:

If it is something of the highest order, the first order, it might need a legislative basis. Other things could probably be achieved via memoranda of understanding between the devolved Governments and the UK Government. We should be looking towards memoranda wherever we can get them because I think that accommodates and respects devolution better than perhaps a heavy-handed legislative approach.⁶³

41. The Welsh Government has called for “a new UK Council of Ministers” to be created, served by an independent secretariat, to strengthen decision making and collaboration in relation to any UK-wide common frameworks.⁶⁴ It has suggested that “the four administrations would meet regularly in a variety of formats to negotiate common rules and frameworks where it is agreed that coherence across the UK is necessary and beneficial”.

42. The UK Minister for Agriculture questioned whether a UK Council of Ministers needed to be formally established, telling us that this “happens already”, through Defra meetings with opposite numbers in all parts of the devolved administration.⁶⁵ Danny Jeyasingam, Deputy Director for the Devolution Team at Defra, told us that discussions about where common frameworks would apply, and what they would look like, were still ongoing, and emphasised that “all those discussions are on the basis of consent”.⁶⁶ He added that discussions about common frameworks were looking at “how decisions are taken, how they will be scrutinised, how disputes will be resolved”.⁶⁷

61 Cabinet Office, [Frameworks analysis: breakdown of areas of EU law that intersect with devolved competence in Scotland, Wales and Northern Ireland](#), 9 March 2018

62 Q478

63 Q124

64 Welsh Government, [Brexit and Devolution: Securing Wales’ Future](#), January 2017

65 Q453

66 Q434

67 Q452

43. The Welsh Government Cabinet Secretary told us that there also needed to be a “completely new structure in place to look at disputes”.⁶⁸ The Welsh Government has suggested that, if there is not agreement between the relevant governments, a combination of the UK and one of the devolved administrations should be sufficient to make decisions about common frameworks, meaning that decisions would not require unanimity but that the UK Government could not impose policy if it was opposed by all of the devolved administrations.⁶⁹ We did not look in detail at this proposition, but there appears to be clear consensus that there will need to be new mechanisms for dispute resolution, whatever they end up looking like.

44. UK-wide common frameworks could be established in a number of different ways, but it is still not clear where they will apply, what they will look like, how they will work, or how any disputes would be resolved. It is imperative that these frameworks are agreed mutually between the UK and devolved governments and ensure the unique issues that face each of the administrations are given due consideration. We believe that these frameworks will need to be supported by robust and transparent intergovernmental mechanisms. We urge the UK Government to work with the Welsh Government to agree on the areas of agricultural policy to which common frameworks will need to apply, and to establish how these will work, and the mechanisms for their governance. This should be done ahead of the Agriculture Bill being introduced in the UK Parliament. The UK Government should keep us updated on the timeframes for the establishment of common frameworks, to ensure that we have an opportunity to scrutinise these arrangements before they come into effect.

Role in future trade deals

45. There has been debate about the extent to which agricultural policy being a devolved area of responsibility will mean the Welsh Government will need to have a role in trade deals. While international agreements—including trade deals—are a reserved policy area, they can include provisions which affect devolved policy, including agriculture. This would be true if a trade deal specified particular standards for animal health, or limits on financial support for agricultural producers.

46. The Welsh Government has stated that, outside of the EU, it would have “a more direct interest in trade negotiations”, particularly given that these would have important inter-dependencies with key aspects of the policy and regulatory context for devolved areas.⁷⁰ The Cabinet Secretary acknowledged that trade deals were a reserved matter,⁷¹ but said that the Welsh Government had “made it very clear we need to be around the table because of the impact on Wales”.⁷² She told us that she did not think there had been any push back to that suggestion.

68 Q550

69 Welsh Government, [Brexit and Devolution: Securing Wales' Future](#), January 2017

70 Welsh Government, [Brexit and Devolution: Securing Wales' Future](#), January 2017

71 Q579

72 Q546

47. George Eustice agreed that there needed “some kind of mechanism” for the UK Government to engage with the devolved administrations on trade deals,⁷³ but told us that “the way in which the devolved Administrations will be engaged in trade deals is still being discussed with the Department for International Trade.”⁷⁴

48. Post-Brexit the Welsh Government will have an increased interest in trade deals negotiated by the UK Government, and particularly their implications for devolved policy areas. Given the inter-dependencies between trade deals and devolved policy, there will need to be robust intergovernmental arrangements to ensure that Welsh interests, and the consequences of trade deals for devolved policy, are considered during negotiations. We recommend that the UK Government agree with the Welsh Government arrangements for seeking the input and consent of the devolved institutions in Wales on trade deals.

73 Q438

74 Q440

5 Agricultural policy post-Brexit

49. The EU has been instrumental in setting agricultural policy—most importantly through the Common Agricultural Policy—for more than 50 years. The EU is currently considering the next round of reforms and financial settlement for CAP, which will determine future policy and funding across the EU. The UK’s withdrawal from the EU will mean that powers over agricultural policy will return to the UK, and decisions made by the EU will therefore not apply to the UK or Wales. Decisions will therefore need to be made about future agricultural policy across the UK, including for Wales.

Future policy

50. The detail of future agricultural policy for Wales will largely be a matter for the Welsh Government, subject to any common frameworks which are agreed between the UK and Welsh Governments. Nevertheless, the UK Government’s agricultural policy will still be of interest to Wales, particularly when it comes to the movement of agricultural produce between England and Wales. Indeed, at the Winter Fair, we met cross-border farmers with land in both England and Wales, who were particularly concerned about the need for consistency in regulations.

51. The Secretary of State for Environment, Food and Rural Affairs has expressed his desire—which was expanded upon in the Government’s Health and Harmony White Paper—to develop an agricultural policy for England that provides public money for public goods and incentivises innovation and environmental protection.⁷⁵ He has contrasted this with the past operation of the Common Agricultural Policy, which has been criticised for focusing too much on direct payments for agricultural production.⁷⁶ The UK Government’s February 2018 consultation paper stated:

For more than forty years, the EU’s Common Agricultural Policy (CAP) has decided how we farm our land, the food we grow and rear and the state of the natural environment. Over that period, the environment has deteriorated, productivity has been held back and public health has been compromised. Now we are leaving the EU we can design a more rational, and sensitive agriculture policy which promotes environmental enhancement, supports profitable food production and contributes to a healthier society.⁷⁷

52. The consultation paper states that “leaving the European Union (EU) provides a once-in-a-generation opportunity to reform Agriculture”, and sets out “a range of possible paths to a brighter future for farming”. These include:

- a) Incentivising methods of farming that create new habitats for wildlife, increase biodiversity, reduce flood risk, better mitigate climate change and improve air quality by reducing agricultural emissions;

75 Department for Environment, Food and Rural Affairs, [“Farming for the next generation”](#), 5 January 2018

76 Ibid

77 Department for Environment, Food and Rural Affairs, [Health and Harmony: the future for food, farming and the environment in a Green Brexit](#), Cm 9577, February 2018, Foreword

- b) Ensuring that public money is spent on public goods, such as restoring peat bog and measures which sequester carbon from the atmosphere; protecting dry stone walls and other iconic aspects of our heritage; and
- c) Reducing disease through new initiatives that better monitor animal health and welfare.⁷⁸

The Welsh Government Cabinet Secretary told us that, while the UK Government’s consultation on future agricultural policy was “for England”,⁷⁹ that was not to say that there was nothing there which was of interest to Wales.⁸⁰ The Cabinet Secretary noted that there were parts of Wales which were comparable to parts of England, and that while she expected agricultural policies for England, Wales, Scotland and Northern Ireland to differ, she told us that they probably would not “wildly” diverge.⁸¹

53. The Welsh Government is considering what future agricultural policy should apply in Wales, and has said that it “needs to address the substantial challenges of exiting the CAP and the Common Fisheries Policy through working closely with industry, communities and other partners to create dynamic, forward-looking Welsh agriculture and fisheries policies.”⁸² In February 2018 the Welsh Government Cabinet Secretary outlined five core principles that would underpin the vision for a new Welsh land management policy. These are set out below.

Box 2: Core principles for the Welsh Government’s post-Brexit land management policy

We need to keep farmers on the land. Welsh land must be managed by those who know it.

We need to ensure our agricultural sector can be prosperous and resilient in a post-Brexit future, whatever that may be.

Our new policy should centre on Welsh land delivering public goods for all the people of Wales.

Our system of support should be accessible to all. That means giving farmers the opportunity to continue to make a living from the land.

We must not turn our backs on food production. Where sustainable production is viable, we must help our farmers compete in a global marketplace.

Source: Welsh Government, [Lesley Griffiths outlines her vision for land management in Wales post Brexit](#), 20 February 2018

The Cabinet Secretary added that the nature of farming and rural communities in Wales was different to other parts of the UK, and that “there is no one size that fits all”. She stated that she wanted to “start detailed discussion with stakeholders about the details and to get their input on what works.” To achieve this, she has “launched a new phase of intensive stakeholder engagement to work collaboratively on the details”, and would “establish new

78 Department for Environment, Food and Rural Affairs, [Health and Harmony: the future for food, farming and the environment in a Green Brexit](#), Cm 9577, February 2018, para 6

79 Q555

80 Q556

81 Q556

82 Welsh Government, [Securing Wales’ Future, Transition from the European Union to a new relationship with Europe](#), 2017, page 21

working groups to consider how best to deliver the principles”. She stated that this would enable the Welsh Government to “bring forward initial proposals for reform by summer recess”.⁸³ In her evidence to us, the Cabinet Secretary stated that the future agricultural policy brought forward by the Welsh Government would focus on landscape, culture and communities.⁸⁴ She also told us the Welsh Government was aiming for future agricultural policy to focus on public goods and public services, but that they were also looking at economic activities.⁸⁵

Aims of future agricultural support payments

54. Post-Brexit, the UK will no longer be governed by the Common Agricultural Policy and associated support payments, and will be able to decide how much it spends on agricultural support, and towards what ends this is directed. We have heard that while the existing levels of subsidy may be necessary to protect farm income in the short term, in the longer term it would be important to ensure that the wellbeing of the agricultural sector and associated supply chains are sustained by healthy production, a strong domestic market, and world-wide trade.⁸⁶ The Secretary of State for Environment, Food and Rural Affairs has expressed his desire to develop a subsidy regime for England that moves away from direct payments for land and provides public money for public goods and incentivises innovation and environmental protection.⁸⁷ This approach would build on the approach already taken by the Common Agricultural Policy—where various streams of financial support are contingent on environmental measures or rural development goals.

55. There is clearly a desire within the agricultural sector for farms to profit from their produce, and not subsidies. John Davies, Deputy President of NFU Cymru, told us that it would be “absolutely great if the market delivered a fair return, and that is obviously our ambition going forward.”⁸⁸ Responding to Mr Gove’s proposals for linking future agricultural support to public goods, Gwyn Howells, Chief Executive of Hybu Cig Cymru, told us that “there is a wide portfolio of public goods that farmers provide, not least of which is producing food for our nation.”⁸⁹

56. Representatives of Young Farmers Wales also favoured a subsidy system geared more towards public goods, and argued that a new system could better support innovation. Jacob Anthony told us that in future agricultural payments should be structured so that they were “rewarding the people [...] who are looking after the land and giving the public good back.”⁹⁰ He said that the current system did not do that to its full potential. Cennydd Jones told us that he would “love to be able to farm without being reliant on subsidies”, because this would mean having a more efficient farm.⁹¹ Laura Elliott said that future support would have to “reward innovation and those farmers who are willing to be brave and try new things and push the industry forward”.⁹²

83 Ibid

84 Q555

85 Q563

86 Q188

87 Department for Environment, Food and Rural Affairs, ‘[Farming for the next generation](#)’, 5 January 2018

88 Q120

89 Q191

90 Q511

91 Q512 [Cennydd Jones]

92 Q512 [Laura Elliott]

57. We were also told that there was a need to challenge those who demonise farmers for receiving support payments. Jacob Anthony told us that farmers were putting this money “back into the communities, keeping the Welsh language going and supporting employment in areas that would have, quite frankly, nothing if it wasn’t for farmers.”⁹³

58. While the UK Government has set out its intentions for future support for farmers in England, the Minister for Agriculture was clear that the design of future agricultural support for Welsh farmers would be a matter for the Welsh Government, telling us that “the Welsh Government will have a free hand to design their own schemes”.⁹⁴

59. Welsh agriculture and particularly livestock farms are heavily dependent on income from the Common Agricultural Policy. While it is widely acknowledged that CAP is not without flaws, it has been very important to a lot of Welsh farmers, and this must be acknowledged. In the long-term we believe that farm income in Wales should be underpinned by strong domestic demand, world-wide export markets, care for the environment and responsible use of land, but it is clear that in the short-term ongoing financial support will be essential to sustain the agricultural sector in Wales.

60. We have heard evidence in favour of the principle of moving away from direct support to linking subsidies to public goods. It is, nevertheless, important that the public goods which are rewarded by future support mechanisms cover all of the contributions made by the agricultural sector. Future subsidies must also be designed around the UK’s long-term trade arrangements and be reactive to the market effects that external tariffs may have on exports and imports. Transitioning to a new system will need to be done in a way which ensures that farmers do not face a cliff-edge with regard to financial support.

The distribution of funds for agricultural support

61. Welsh agriculture, and livestock farms in particular, are far more dependent upon payments from the Common Agricultural Policy (CAP) than their English counterparts—in some cases this can account for 80% of farm income in Wales, as compared to an average of 55% for the whole of the UK.⁹⁵ For the most recent round of allocations England, Northern Ireland, Wales and Scotland received the same proportion of the CAP budget as they did in the previous round. These allocations are set out below.

Table 1: UK CAP allocations, 2014–20 (€ million)

	UK	England	Scotland	Wales	NI
Pillar 1	25,061	16,421	4,096	2,245	2,299
Pillar 2	2,580	1,520	478	355	227
Total	27,641	17,941	4,574	2,600	2,526
% of total		65%	17%	9%	9%

Source: Department for Environment, Food and Rural Affairs, [UK CAP allocations announced](#), November 2013

93 Q512 [Jacob Anthony]

94 Q442

95 Q194

62. While the UK Government has been clear that future support mechanisms for Welsh agriculture will be a matter for the Welsh Government, almost as important as the design of the subsidy system is the amount of money which will be available to the Welsh Government to fund it. The UK Government has guaranteed that total spending on agricultural support will remain the same until the end of the current Parliament, under the expectation that this will be 2022,⁹⁶ and has said that this will involve paying the “same cash funds”. The Minister for Agriculture told us that it was not clear what the total level of UK funding for agricultural support would be post-2022, but told us that total UK spending on agricultural support would be a spending decision for the UK Government.⁹⁷

63. Addressing the distribution of funds within the UK, in November 2017 the Minister for Agriculture said that the Government was “committed to delivering an approach that works for the whole of the UK and reflects the needs and individual circumstances of Scotland, Wales and Northern Ireland.”⁹⁸ He told us:

the strong representations that we are getting from the industry and, indeed, from the devolved Administrations, are that the preference is for a dedicated ring-fenced agricultural fund, rather than a Barnettised approach. We understand the preference of both industry and the devolved Administrations.⁹⁹

The Barnett Formula is used to determine funding for Wales in other areas, and is based on population share. The Minister said that he would not rule out any change to the allocations across the UK, but for the short-term said that these would “remain in a similar ballpark”. He did acknowledge that “it will be important that we work out how [funding] is allocated around the UK, so that each Administration has the funding it needs to implement its schemes and to fund a transition from the current scheme [...] to wherever they want to end up.”¹⁰⁰

64. The Welsh Assembly’s Climate Change, Environment and Rural Affairs Committee heard evidence from various environmental and agricultural interest groups arguing that funding should not be subject to the Barnett Formula.¹⁰¹ NFU Cymru told that Committee that using the Barnett Formula to allocate agricultural funding would result in 40% less funding for Wales.¹⁰² Similarly, the Welsh Government Cabinet Secretary told us “we obviously do not want it to be Barnettised”, but said that she thought that the prospect of the Barnett formula applying to agricultural support was probably a red herring.¹⁰³ The Cabinet Secretary confirmed that “any funding that comes back from the UK Government will be ring-fenced for agricultural support”.¹⁰⁴

96 Department for Environment, Food and Rural Affairs, [Health and Harmony: the future for food, farming and the environment in a Green Brexit](#), Cm 9577, February 2018, para 8

97 Q473

98 HC Deb, 20 November 2017, Agriculture: Scotland, [WQ112800](#) [Written answer]

99 Q460

100 Q450

101 Welsh Assembly Climate Change, Environment and Rural Affairs Committee, [The future of land management in Wales](#), March 2017

102 [Written evidence from NFU Cymru to the Welsh Assembly’s Climate Change, Environment and Rural Affairs Committee](#), accessed June 2018

103 Q557

104 Q557

65. At present funding from the Common Agricultural Policy is set by the EU for 7-year periods, which provide farmers with a clear indication of the level of support they are likely to receive over the coming years. These funding allocations are made at an EU level, meaning the commitments are not affected by UK parliamentary elections or budget decisions. The current Government has confirmed that agricultural support will remain the same for the duration of the current Parliament, but it remains to be seen how future funding settlements will be set, how many years they will cover, and when devolved administrations would receive their share of these funds. Uncertainty about future funding is clearly a concern for the sector, as evidenced by farmers at the Winter Fair who called for clarity about future funding allocations. This is a point which was reinforced by the Cabinet Secretary.¹⁰⁵

66. In terms of arrangements for ensuring that funds transferred to the Welsh Government in respect of agricultural support are spent on this area, the UK Agricultural Minister noted that “the strong representations that we are getting from the industry and, indeed, from the devolved Administrations, are that the preference is for a dedicated ring-fenced agricultural fund”.¹⁰⁶ When we asked the Welsh Government Cabinet Secretary about this, she told us: “Both the First Minister and myself have said publicly that any funding that comes back from the UK Government will be ring-fenced for agricultural support, which I think reassured the sector.”¹⁰⁷

67. It is essential that, post-Brexit, Wales receives its fair share of funding for agricultural support. We welcome the reassurances from the UK Government that allocations for agricultural support will remain broadly the same over the next few years, but work needs to be undertaken as a matter of urgency to determine how future agricultural support will be distributed across the UK. We recommend that—before Committee stage of the Agriculture Bill in the House of Commons—the UK Government agree with the devolved administrations a mechanism for future allocations of funding for agricultural support.

68. We welcome the commitment from the Welsh Government that any funding that is provided by the UK Government will be ring-fenced for agricultural support. This ring-fencing will be essential to ensure that farmers in Wales do not lose out compared to farmers in other parts of the UK.

69. Farmers and the businesses they operate depend upon certainty, and it is critical for the future of Welsh farming that they can plan for the long term. Post-Brexit, it will be important that farmers and the devolved administrations have a similar level of certainty about future agricultural support as is currently provided under the Common Agricultural Policy. Urgent consideration needs to be given to how this will be achieved, particularly in relation to the process for making budgetary commitments at a UK level, and providing funds to the devolved administrations for devolved areas of spending. We recommend that the UK Government set out, in its response to this Report, how this certainty will be provided.

105 Q567

106 Q460

107 Q557

6 Productivity, promotion and procurement

A strategy for supporting and promoting Welsh agriculture

70. Although the exact design of future agricultural policy for Wales will largely be a matter for the Welsh Government, subject to any common frameworks which are agreed between the UK and Welsh Governments, over the course of our inquiry we have heard a number of suggestions for how future agricultural policy could aim to support the Welsh red meat farming sector. Below, we consider how some of these could be supported by the UK Government, in collaboration with the Welsh Government, to help Welsh agriculture thrive post-Brexit.

Productivity

71. We have heard that there has been a decline in the productivity of the Welsh agricultural sector, and that if this continues it could risk exporting domestic production to countries with lower standards,¹⁰⁸ and also mean that the supply chains which rely on agricultural produce would no longer be sustainable.¹⁰⁹ In light of this, once the UK has left the EU there will be a need for Wales to pursue greater innovation and productivity, so that Welsh agriculture is competitive both domestically and in new international markets. We heard that this might be achieved by increasing shelf life, exporting individual cuts rather than whole carcasses, marketing offal in the Far-East, and increasing the live-weight of livestock.¹¹⁰ We also heard that Welsh farmers could work more collaboratively with New Zealand exporters to complement contrasting seasonality.¹¹¹

72. Extending the shelf life of Welsh lamb could be particularly significant in expanding the markets to which it could be exported. Gwyn Howells, Chief Executive of Hybu Cig Cymru, emphasised that the average shelf life of lamb bred in the UK was approximately 30 days whereas New Zealand lamb has a shelf life averaging 70 days. This reduces costs to New Zealand's exporters and makes the product more commercially attractive. The Welsh Government Cabinet Secretary told us that there was a lot we could learn from how other countries do things, and said that she had asked officials to look at what could be learned from other countries about increasing shelf life.¹¹²

73. However, we heard that increasing shelf life can only be achieved by implementing reforms across the supply chain which relate to aspects of both cleanliness and slaughter.¹¹³ Glyn Roberts, President of the Farmers Union of Wales, told us that the average farm in New Zealand had possibly 2,000 to 3,000 sheep, where the average in Wales is about 70 sheep, and also said that having fewer sheep on each individual farm meant better animal welfare.¹¹⁴

108 Q105 [Dr Fenwick]

109 Q105 [Glyn Roberts]

110 Q106, Q203, Q208, Q209

111 Q166

112 Q574

113 Q203, Q205

114 Q99

Identifying future trade opportunities

74. The UK Government has been clear that, post-Brexit, it intends to pursue an ambitious free trade agenda and agree new trade deals with a range of non-EU nations.¹¹⁵ Several of our witnesses recognised opportunities for Welsh agriculture in securing trade agreements between the UK and non-EU nations.¹¹⁶ We were told that opening new markets and achieving trade deals that will allow for the large-scale export of produce—be they comprehensive free trade arrangements or agreements specific to certain sectors—could take as long as a decade.¹¹⁷ We heard that accessing new markets will require leadership, prioritisation, and the investment of time from senior Government figures.¹¹⁸ It was therefore welcome when the Secretary of State for Wales, Rt Hon Alun Cairns MP, told us that he had already begun working with the industry and Cabinet colleagues to identify non-European markets and remove barriers to trade.¹¹⁹

Marketing and promotion

75. If opening up the UK to new international markets is to benefit Wales, much greater emphasis will need to be placed on the marketing and promotion of Welsh produce, as it becomes established in world-wide markets. We heard that the potentially lucrative Chinese and US markets remain relatively untapped for many Welsh products.¹²⁰ We are, therefore, concerned at the very limited resources available to promote Welsh produce in new markets. It is also not clear what role the UK Government intends to play in promoting Welsh produce in new markets.

Meeting labour needs

76. Welsh agriculture requires an ongoing supply of suitably skilled workers both within the industry and the wider supply chain. We heard that many parts of the agricultural supply chain are heavily reliant on migrant workers from the EU, and were also told that a downturn in recruitment has already affected abattoirs in Wales.¹²¹ One possible solution to this post-Brexit is the reintroduction of a Seasonal Agricultural Workers Scheme—which would enable migrant workers, who would not qualify for a skilled work visa, to travel to the UK specifically to work in the agricultural sector during periods of peak demand. The Welsh Government’s Cabinet Secretary told us that 100% of the vets who work in the Food Standards Agency—which is responsible for food safety and food hygiene across the UK—are EU graduates, and that in abattoirs and meat processing plants around 80% of the workforce could be EU nationals.¹²² Furthermore, we heard that the demand for labour in agriculture and the associated supply chain is often on a seasonal basis as opposed to year-round employment, which made it more difficult to recruit local workers, who were looking for employment all year round.¹²³

115 Department for International Trade, [Preparing for our future UK trade policy](#), Cm 9470, October 2017

116 Q514 [Jacob Anthony], Q182 [David Swales]

117 Q207 [David Swales], Q219 [Gwyn Howells]

118 Q220 [Gwyn Howells]

119 Qs80–81, Responsibilities of the Secretary of State for Wales, [Oral evidence taken on 19 December 2017](#), HC 680

120 Q208, Q218

121 Q241 [Gwyn Howells]

122 Q590

123 Q245

77. Many parts of the agricultural supply chain are heavily reliant on migrant workers from the EU, who are willing to work long hours for relatively low wages. We accept that the UK's withdrawal from the EU means that, in the future, different immigration arrangements will apply to EU citizens. If the UK's exit from the EU were to lead to a collapse in the supply of suitable workers willing to participate in physically demanding seasonal work this would increase costs for the agricultural sector and, ultimately, consumers. Such a situation must not be allowed to happen.

Conclusion

78. Post-Brexit, Welsh agriculture will need to pursue greater innovation and productivity to ensure that Wales is competitive both domestically and in new international markets. It will also be necessary to ensure that the sector has access to the labour it requires, and that future trade agreements secure access to markets which provide the greatest opportunities to Wales. We believe that the UK Government has an important role in supporting this work.

79. *In light of the suggestions we have heard about how Welsh agriculture can be supported post-Brexit, we recommend that the UK Government, working in collaboration with the Welsh Government, bring forward a strategy setting out how it will support and promote Welsh agriculture—and particularly the red meat sector—once the UK has left the EU. This should cover:*

- *Proposals for investment and support to drive improved innovation and productivity in the red meat sector—such as by increasing the shelf life of lamb.*
- *Plans for securing new trade agreements with international markets which present the greatest opportunities for Welsh agriculture.*
- *An assessment of the resources required to effectively market Welsh produce in new markets.*
- *Details of how Cabinet ministers, including the Secretary of State for Wales, will promote Welsh produce in new markets.*
- *More effective ways of attracting British workers into posts within the agricultural sector and its supply chain.*
- *Plans for the introduction of seasonal workers' schemes where necessary.*

Protecting health and welfare standards in new trade agreements

80. While several of our witnesses recognised opportunities for Welsh agriculture in securing trade agreements between the UK and non-EU nations,¹²⁴ we have also heard concerns about risks which could result from these, if not done properly.¹²⁵ Glyn Roberts, President of the Farmers Union of Wales, told us that any new trade agreements should ensure that imports are on a par with domestic produce, arguing that it is “not fair to import a lower standard on our red meat”.¹²⁶ Asked which foreign importers presented

124 Q514 [Jacob Anthony], Q182 [David Swales]

125 Q522 [Cennydd Jones]

126 Q100

the biggest threat to Welsh agriculture, Cennydd Jones, Senior Member of the Year at YFC Wales, told us that New Zealand was the biggest threat in terms of flooding the UK market with lamb, while the US was the greatest threat when it came to undermining and undercutting Welsh agriculture as a whole.¹²⁷

81. We heard evidence that some countries with which Welsh farmers may have to compete in the future will often encourage very large herds and intensive farming processes which can undermine the welfare of animals.¹²⁸ In addition, agricultural produce from other countries can include hormone-treated beef and chlorine-washed chicken.¹²⁹ We have heard that allowing imports of agricultural produce which does not meet the UK's high standards would create a significant risk of domestic production being undermined by imports from countries with standards far below those on Welsh farms.¹³⁰ This was highlighted by the Welsh Government Cabinet Secretary, who told us that she did not want to see “Welsh food and drink producers, our agricultural sector, to be competing with countries with much lower standards than ours”.¹³¹ The UK Government has also highlighted high standards and animal welfare as priorities for future agricultural policy for England,¹³² and in March 2018 the Prime Minister said that she fully expected that “our standards will remain at least as high as the EU’s”.¹³³

82. We heard particular concerns that Welsh agriculture might not be a priority for the UK Government in negotiating future trade agreements, which we were told could affect not just Welsh agriculture but rural communities as a whole.¹³⁴ We found no desire within Wales to lower standards and we do not believe that this would be the correct response to the challenges of Brexit.

83. As the UK Government pursues new trade agreements, it must not trade away the interests of Welsh agriculture. Trade deals which expose Wales to cheap agricultural goods—not produced in line with the high standards of domestic produce—in order to gain preferential access for sectors such as financial services will represent a bad deal for Wales, and must not be pursued. It would also be unacceptable if any future trade agreements resulted in Welsh producers having to compete on an unfair playing field with imports that do not meet the UK’s world-leading animal welfare and environmental standards. When securing new trade agreements the Government must not tolerate lower environmental and welfare standards for food imported into the UK, than food which is produced within the UK.

The red meat levy

84. Hybu Cig Cymru (HCC), the body responsible for the promotion and development of the Welsh meat industry, is funded by the red meat levy, which is “raised on all cattle, sheep and pigs slaughtered in Wales or exported live” and jointly paid by producers, slaughterers

127 Q522

128 Q99 [Glyn Roberts], Q225 [David Swales]

129 Q225 [David Swales]

130 Q225 [David Swales], Q504 [Cennydd Jones]

131 Q568

132 Department for Environment, Food and Rural Affairs, [Health and Harmony: the future for food, farming and the environment in a Green Brexit](#), Cm 9577, February 2018

133 Prime Minister’s Office, [PM speech on our future economic partnership with the European Union](#), 2 March 2018

134 Q507 [Cennydd Jones], Q508 [Laura Elliott]

and exporters.¹³⁵ There is a long-standing inequity in the way HCC is funded. Under the existing system receipts from Welsh animals slaughtered in England are not reinvested in the Welsh industry, but are instead collected by the Agriculture and Horticulture Development Board the UK-wide body funded by levy proceeds from England (and for some products Great Britain or the UK).¹³⁶ A 2014 study published by HCC showed that over 70% of Welsh cattle were slaughtered in England so this arrangement represents a significant loss to the Welsh industry.¹³⁷ In 2015 the Government said that it would consult on this issue,¹³⁸ but nothing was done as a result.

85. When we put this to the Minister for Agriculture, he recognised that there was an issue with the red meat levy in relation to animals which crossed the border, and told us that “we probably need to look at how the levy is collected and consider possible alternatives”.¹³⁹ That said, the Minister noted that the Agriculture and Horticulture Development Board, spent about £7 million a year on UK-wide work, and said there would be a need to factor this in to any alternative arrangements.¹⁴⁰

86. We do not believe that the way in which the red meat levy operates provides Hybu Cig Cymru with sufficient resource to market and promote Welsh red meat in the way which will be required for the sector to make a success of Brexit. There is a particular unfairness that levy-proceeds from animals raised in Wales but slaughtered in England go to the UK levy body, and not the HCC. This issue has required resolution for too long—the Government said it would consult on this in 2015, but took no action—and we are disappointed by the lack of urgency with which UK ministers have approached this issue. It now threatens to be a serious impediment to the effective promotion of Welsh meat post-Brexit, when Welsh produce will need to be promoted in new markets. We recommend that the UK Government overhauls the complex framework underpinning the red meat levy so that the value accrued from the slaughter of animals reared in Wales is reinvested in the promotion of Welsh produce. We expect this problem to be resolved before the UK exits the EU, and recommend that any legislative changes which are necessary to achieving this should be included in the forthcoming Agriculture Bill.

Public procurement

87. We heard that public procurement of food—and the failure by public authorities to source local produce—has been a cause of frustration for domestic producers, who see that large-scale purchasers, such as hospitals, school catering services and the armed forces, have not always had the ability to favour British produce.¹⁴¹ Huw Thomas, Political Adviser at NFU Cymru, told us that the move to greater use of domestic product in public procurement contracts was “a potential Brexit dividend”.¹⁴² It is reassuring, therefore, that the Secretary of State for Environment, Food and Rural Affairs, Rt Hon Michael Gove MP, has acknowledged that the UK Government “can still do more to improve the procurement of British food across the public sector”.¹⁴³ Our witnesses suggested that

135 Hybu Cig Cymru, ‘[Welsh Red Meat Levy Rates](#)’, accessed 15 March 2018

136 Hybu Cig Cymru, ‘[Levy Rates](#)’, accessed 15 March 2018

137 Hybu Cig Cymru, ‘[A Review of the Beef Sector in Wales](#)’, September 2014, paras 122–123

138 HC Deb, 29 January 2014, [185042](#) [Commons written answer]

139 Qs502–3

140 Ibid

141 Q131 [John Davies]

142 Q132

143 Department for Environment, Food and Rural Affairs, ‘[Farming for the next generation](#)’, 5 January 2018

some mechanisms already exist to shape public procurement to encourage the purchase of local produce.¹⁴⁴ The Minister for Agriculture told us that the UK Government had been successful at increasing the amount of British food being sourced by Government Departments, and said that similar action in relation to Welsh public bodies was a matter for the Welsh Government.¹⁴⁵

88. We heard encouraging evidence that public procurement can be better used to encourage the purchase of local produce, and post-Brexit there may be opportunities for increasing the flexibility of public bodies to procure local produce. *The UK Government should seek to maximise these opportunities, and we recommend that, by the end of the year, the UK Government publish an action plan which details how it intends to increase the procurement of domestic produce by public bodies. As part of this action plan the UK Government, in conjunction with the devolved Governments, should provide public bodies with guidance outlining how, within existing rules, they can support the procurement of locally produced food. We also urge the Secretary of State for Wales to work with his Cabinet colleagues to explore how major public purchasers of food, such as the NHS and the armed forces, can be supported in procuring local produce.*

144 Q229 [Gwyn Howells]

145 Q498

Conclusions and recommendations

The importance of Welsh agriculture

1. Agriculture is central to community life in rural Wales and the health of the Welsh language, and is at the heart of long-standing and complex supply chains which underpin the rural economy in Wales. It is also a significant contributor to the Welsh economy and job market—accounting for a higher proportion of jobs and economic value in Wales than it does for the UK as a whole. The red meat industry in Wales—and the flagship product of Welsh lamb in particular—is of singular importance to Welsh agriculture and the Welsh brand. (Paragraph 8)
2. *In preparing for Brexit the UK Government must recognise the specific and unique circumstances of agriculture in Wales. These include the extent to which local communities and economies rely on relatively small farms and the supply chains that support them. Throughout this Report we highlight a number of specific ways in which the Government can respond to the particular needs of Wales.* (Paragraph 9)

Priorities for UK-EU negotiations

3. The EU is the main market for exports of Welsh agricultural products; it is the destination of over 80% of Welsh food and animal exports, including over 90% of meat, dairy, egg and animal feed exports. Barrier-free access to EU markets is therefore essential to the future of Welsh agriculture. The majority of our witnesses, including the Welsh Government, believed this would best be met by continued membership of the Single Market and Customs Union, but we note that there are many different options for future trade relations between the UK and EU, and that the UK Government believes it is possible to achieve frictionless borders and tariff-free trade through a free trade and customs agreement. Whatever the UK's future trade relationship with the EU, it must reflect the market access needs of Welsh farmers. (Paragraph 17)
4. *In formulating its preferred vision for future UK-EU trade relations, the UK Government should recognise that the overwhelming view of the representatives we heard from was that they would be best served by retaining membership of the Single Market and Customs Union, in order to ensure current access to EU markets with no new barriers—be they in the form of tariffs, customs controls or other checks* (Paragraph 18)
5. The European Union's system of Protected Geographic Indicators (PGIs) and Products of Designated Origin (PDOs) protects the provenance and underlines the quality of Welsh produce. This has been particularly important for Welsh lamb, where its status has been the foundation for its export across the EU. Facilitated by these protections, Welsh agricultural produce has been exported across the EU, benefitting the Welsh economy and focusing international attention on Wales and Welsh produce. (Paragraph 21)

6. *The Government must ensure that future arrangements for geographic indicators lead to no reduction in protection for agricultural producers, and that Welsh producers can enjoy continued recognition by the EU's system of Protected Geographic Indicators. (Paragraph 22)*

Responsibility for agricultural policy

7. We recognise the agreement between the UK and Welsh Governments on the approach of the European Union (Withdrawal) Bill to responsibility for areas of agricultural policy which will return to the UK post-Brexit. It is essential that any changes to the devolution settlement for Wales which result from Brexit are agreed with the Welsh Government, and not imposed by Westminster. It is regrettable that it took so long for this agreement to be reached. (Paragraph 33)
8. It is clear that, post-Brexit, UK-wide common frameworks will be required in some areas of devolved policy, to ensure there are no barriers within the UK market, that the UK is in compliance with international obligations and that the UK's common resources are protected. We welcome the agreement between the UK Government and devolved administrations about the areas where these will be necessary. (Paragraph 39)
9. UK-wide common frameworks could be established in a number of different ways, but it is still not clear where they will apply, what they will look like, how they will work, or how any disputes would be resolved. It is imperative that these frameworks are agreed mutually between the UK and devolved governments and ensure the unique issues that face each of the administrations are given due consideration. We believe that these frameworks will need to be supported by robust and transparent intergovernmental mechanisms. *We urge the UK Government to work with the Welsh Government to agree on the areas of agricultural policy to which common frameworks will need to apply, and to establish how these will work, and the mechanisms for their governance. This should be done ahead of the Agriculture Bill being introduced in the UK Parliament. The UK Government should keep us updated on the timeframes for the establishment of common frameworks, to ensure that we have an opportunity to scrutinise these arrangements before they come into effect.* (Paragraph 44)
10. Post-Brexit the Welsh Government will have an increased interest in trade deals negotiated by the UK Government, and particularly their implications for devolved policy areas. Given the inter-dependencies between trade deals and devolved policy, there will need to be robust intergovernmental arrangements to ensure that Welsh interests, and the consequences of trade deals for devolved policy, are considered during negotiations. *We recommend that the UK Government agree with the Welsh Government arrangements for seeking the input and consent of the devolved institutions in Wales on trade deals.* (Paragraph 48)

Agricultural policy post-Brexit

11. Welsh agriculture and particularly livestock farms are heavily dependent on income from the Common Agricultural Policy. While it is widely acknowledged that CAP is not without flaws, it has been very important to a lot of Welsh farmers, and this must be acknowledged. In the long-term we believe that farm income in Wales should be underpinned by strong domestic demand, world-wide export markets, care for the environment and responsible use of land, but it is clear that in the short-term ongoing financial support will be essential to sustain the agricultural sector in Wales. (Paragraph 59)
12. We have heard evidence in favour of the principle of moving away from direct support to linking subsidies to public goods. It is, nevertheless, important that the public goods which are rewarded by future support mechanisms cover all of the contributions made by the agricultural sector. Future subsidies must also be designed around the UK's long-term trade arrangements and be reactive to the market effects that external tariffs may have on exports and imports. Transitioning to a new system will need to be done in a way which ensures that farmers do not face a cliff-edge with regard to financial support. (Paragraph 60)
13. It is essential that, post-Brexit, Wales receives its fair share of funding for agricultural support. We welcome the reassurances from the UK Government that allocations for agricultural support will remain broadly the same over the next few years, but work needs to be undertaken as a matter of urgency to determine how future agricultural support will be distributed across the UK. *We recommend that—before Committee stage of the Agriculture Bill in the House of Commons—the UK Government agree with the devolved administrations a mechanism for future allocations of funding for agricultural support.* (Paragraph 67)
14. We welcome the commitment from the Welsh Government that any funding that is provided by the UK Government will be ring-fenced for agricultural support. This ring-fencing will be essential to ensure that farmers in Wales do not lose out compared to farmers in other parts of the UK. (Paragraph 68)
15. Farmers and the businesses they operate depend upon certainty, and it is critical for the future of Welsh farming that they can plan for the long term. Post-Brexit, it will be important that farmers and the devolved administrations have a similar level of certainty about future agricultural support as is currently provided under the Common Agricultural Policy. Urgent consideration needs to be given to how this will be achieved, particularly in relation to the process for making budgetary commitments at a UK level, and providing funds to the devolved administrations for devolved areas of spending. *We recommend that the UK Government set out, in its response to this Report, how this certainty will be provided.* (Paragraph 69)

Productivity, promotion and procurement

16. Many parts of the agricultural supply chain are heavily reliant on migrant workers from the EU, who are willing to work long hours for relatively low wages. We accept that the UK's withdrawal from the EU means that, in the future, different immigration arrangements will apply to EU citizens. If the UK's exit from the EU were to lead to a collapse in the supply of suitable workers willing to participate in physically demanding seasonal work this would increase costs for the agricultural sector and, ultimately, consumers. Such a situation must not be allowed to happen. (Paragraph 77)
17. Post-Brexit, Welsh agriculture will need to pursue greater innovation and productivity to ensure that Wales is competitive both domestically and in new international markets. It will also be necessary to ensure that the sector has access to the labour it requires, and that future trade agreements secure access to markets which provide the greatest opportunities to Wales. We believe that the UK Government has an important role in supporting this work. (Paragraph 78)
18. *In light of the suggestions we have heard about how Welsh agriculture can be supported post-Brexit, we recommend that the UK Government, working in collaboration with the Welsh Government, bring forward a strategy setting out how it will support and promote Welsh agriculture—and particularly the red meat sector—once the UK has left the EU. This should cover:*
 - *Proposals for investment and support to drive improved innovation and productivity in the red meat sector—such as by increasing the shelf life of lamb.*
 - *Plans for securing new trade agreements with international markets which present the greatest opportunities for Welsh agriculture.*
 - *An assessment of the resources required to effectively market Welsh produce in new markets.*
 - *Details of how Cabinet ministers, including the Secretary of State for Wales, will promote Welsh produce in new markets.*
 - *More effective ways of attracting British workers into posts within the agricultural sector and its supply chain.*
 - *Plans for the introduction of seasonal workers' schemes where necessary.* (Paragraph 79)
19. As the UK Government pursues new trade agreements, it must not trade away the interests of Welsh agriculture. Trade deals which expose Wales to cheap agricultural goods—not produced in line with the high standards of domestic produce—in order to gain preferential access for sectors such as financial services will represent a bad deal for Wales, and must not be pursued. It would also be unacceptable if any future trade agreements resulted in Welsh producers having to compete on an unfair playing field with imports that do not meet the UK's world-leading animal welfare and environmental standards. *When securing new trade agreements the Government must not tolerate lower environmental and welfare standards for food imported into the UK, than food which is produced within the UK.* (Paragraph 83)

20. We do not believe that the way in which the red meat levy operates provides Hybu Cig Cymru with sufficient resource to market and promote Welsh red meat in the way which will be required for the sector to make a success of Brexit. There is a particular unfairness that levy-proceeds from animals raised in Wales but slaughtered in England go to the UK levy body, and not the HCC. This issue has required resolution for too long—the Government said it would consult on this in 2015, but took no action—and we are disappointed by the lack of urgency with which UK ministers have approached this issue. It now threatens to be a serious impediment to the effective promotion of Welsh meat post-Brexit, when Welsh produce will need to be promoted in new markets. *We recommend that the UK Government overhauls the complex framework underpinning the red meat levy so that the value accrued from the slaughter of animals reared in Wales is reinvested in the promotion of Welsh produce. We expect this problem to be resolved before the UK exits the EU, and recommend that any legislative changes which are necessary to achieving this should be included in the forthcoming Agriculture Bill.* (Paragraph 86)
21. We heard encouraging evidence that public procurement can be better used to encourage the purchase of local produce, and post-Brexit there may be opportunities for increasing the flexibility of public bodies to procure local produce. *The UK Government should seek to maximise these opportunities, and we recommend that, by the end of the year, the UK Government publish an action plan which details how it intends to increase the procurement of domestic produce by public bodies. As part of this action plan the UK Government, in conjunction with the devolved Governments, should provide public bodies with guidance outlining how, within existing rules, they can support the procurement of locally produced food. We also urge the Secretary of State for Wales to work with his Cabinet colleagues to explore how major public purchasers of food, such as the NHS and the armed forces, can be supported in procuring local produce.* (Paragraph 88)

Formal minutes

Tuesday 3 July 2018

Members present:

David T. C. Davies, in the Chair

Tonia Antoniazzi

Anna McMorrin

Susan Elan Jones

Liz Saville Roberts

Ben Lake

Draft Report (*Brexit: priorities for Welsh agriculture*), proposed by the Chair, brought up and read.

Ordered, That the draft Report be read a second time, paragraph by paragraph.

Paragraphs 1 to 88 read and agreed to.

Resolved, That the Report be the Second Report of the Committee to the House.

Ordered, That the Chair make the Report to the House.

Ordered, That embargoed copies of the Report be made available (Standing Order No. 134).

[Adjourned till this day at 2.15 pm]

Witnesses

The following witnesses gave evidence. Transcripts can be viewed on the [inquiry publications page](#) of the Committee's website.

Tuesday 17 October 2017

Question number

Professor Richard Rawlings, Professor of Public Law, University College London

[Q1–39](#)

Tuesday 24 October 2017

Dr Jo Hunt, Reader in Law, Cardiff University, **Dr Viviane Gravey**, Lecturer, Queen's University Belfast and **Dr Nerys Llewelyn Jones**, Managing Partner, Agri Advisor Legal LLP

[Q40–92](#)

Tuesday 12 December 2017

John Davies, Deputy President, NFU Cymru, **Huw Thomas**, Political Adviser, NFU Cymru, **Glyn Roberts**, President, Farmers Union of Wales, and **Dr Nick Fenwick**, Head of Policy, Farmers Union of Wales

[Q93–179](#)

Tuesday 9 January 2018

David Swales, Head of Strategic Insight, Agriculture and Horticulture Development Board, and **Gwyn Howells**, Chief Executive, Hybu Cig Cymru

[Q180–245](#)

Tuesday 30 January 2018

Chris Yarsley, Policy Manager, Freight Transport Association, **Mark Simmonds**, Policy Manager, British Ports Association, **Hans Noren**, Chairman, Stena Line UK and **Captain Wyn Parry**, Operations Manager Irish Sea South, Stena Line UK

[Q246–312](#)

Tuesday 20 February 2018

Jill Rutter, Programme Director, Institute for Government, and **Joe Owen**, Senior Researcher, Institute for Government

[Q313–330](#)

Professor James Foreman-Peck, Head of the Economics Section, Cardiff Business School, and **Professor Patrick Minford**, Professor of Applied Economics, Cardiff Business School

[Q331–364](#)

Tuesday 13 March 2018

Professor Nicholas Perdikis, Professor of International Business, Aberystwyth University

[Q365–432](#)

Tuesday 1 May 2018

George Eustice MP, Minister of State for Agriculture, Fisheries and Food, Department for Environment, Food and Rural Affairs, and **Danny Jeyasingam**, Deputy Director, Devolution Team, Department for Environment, Food and Rural Affairs

[Q433–503](#)

Tuesday 8 May 2018

Laura Elliott, Chairman, YFC Wales (The Wales Federation of Young Farmers Clubs), **Dafydd Jones**, Vice Chairman and Rural Affairs Chairman, YFC, **Cennydd Jones**, Senior Member of the Year, YFC, **Jacob Anthony**, Member, YFC Wales, and **Caryl Hughes**, Member, YFC Wales

[Q504–542](#)

Thursday 7 June 2018

Lesley Griffiths AM, Cabinet Secretary for Energy, Planning and Rural Affairs, Welsh Government, and **Tim Render**, Director, Environment and Rural Affairs, Welsh Government

[Q543–590](#)

Published written evidence

The following written evidence was received and can be viewed on the [inquiry publications page](#) of the Committee's website.

BAT numbers are generated by the evidence processing system and so may not be complete.

- 1 British Veterinary Association Welsh Branch ([BAT0011](#))
- 2 CLA Cymru ([BAT0004](#))
- 3 Compassion in World Farming ([BAT0001](#))
- 4 Countryside Alliance ([BAT0014](#))
- 5 Cytun - Churches Together in Wales ([BAT0006](#))
- 6 DAIRY UK ([BAT0002](#))
- 7 Hybu Cig Cymru ([BAT0019](#))
- 8 Institute for Government ([BAT0013](#))
- 9 Learned Society of Wales ([BAT0008](#))
- 10 NFU Cymru ([BAT0005](#))
- 11 NFU Cymru ([BAT0018](#))
- 12 Petetin, Dr Ludivine ([BAT0010](#))
- 13 RSPCA Cymru ([BAT0007](#))
- 14 Royal College of Veterinary Surgeons ([BAT0009](#))
- 15 Wales Environment Link ([BAT0003](#))
- 16 Williams, Mr Peter ([BAT0017](#))
- 17 Wine and Spirit Trade Association ([BAT0016](#))

List of Reports from the Committee during the current Parliament

All publications from the Committee are available on the [publications page](#) of the Committee's website.

Session 2017–19

First Report	The cancellation of rail electrification in South Wales	HC 403
--------------	---	--------