

Senedd Cymru

Pwyllgor yr Economi, Masnach a Materion Gwledig

Ymchwiliad: Prosesu Bwyd

Cyf: FP12

Ymateb gan: Undeb Amaethwyr Cymru

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Welsh Parliament

Economy, Trade, and Rural Affairs Committee

Inquiry: Food Processing

Ref: FP12

Evidence from: Farmers' Union of Wales (FUW)



Farmers' Union of Wales' response to an Economy, Trade and Rural Affairs Committee inquiry into Food Processing in Wales

24th June 2025

About the FUW

1. The Farmers' Union of Wales (FUW) was established in 1955 to exclusively represent the interests of farmers in Wales. Since 1978 the union has been formally recognised by UK Governments, and subsequently by Welsh Governments, as independently representing those interests.
2. The FUW's Vision is *Thriving, Sustainable, Family Farms in Wales*, while the Mission of the Union is *To Advance and Protect Wales' Family Farms, Both Nationally and Individually, in Order to Fulfil the Union's Vision*.
3. In addition to its Head Office, which has thirty full-time members of staff, the FUW Group has around 80 members of staff based in twelve regional offices around Wales providing a broad range of services for members.
4. The FUW is a democratic organisation, with policies being formulated following consultation with its twelve County Executive Committees and eleven Standing Committees.

The Welsh Government's performance in delivering against the objectives of the Vision for the Food and Drink Industry and whether the objectives remain fit for purpose or whether they should be revised

5. The Vision document is largely focused on the manufacturing and processing industry, therefore, the objectives are not directly relevant to FUW members' day to day business activities. However, there are some connections which should be strengthened and noted.
6. While the Welsh Government is renowned for celebrating the successes of the Welsh food and drink sector, the FUW has long argued that there is a lack of recognition for farmers and producers who supply mainstream commodity markets within the Welsh Government's strategies for the food and drink sector.
7. Firstly, one of the themes identified is *"A food chain approach through close collaboration with stakeholders throughout the wider food system."* This implies a whole system approach by the Government for both food producers and food manufacturing. However, there appears to be a distinct difference in narrative between the Government's food and drink

industry strategy and objectives in comparison to the Agriculture Act (2023) (there is no equivalent Agriculture Industry Strategy, however, the Sustainable Farming Scheme will become the main delivery mechanism for the Sustainable Land Management objectives as set out in the Agriculture Act).

8. The food and drink industry objectives include increasing the scale, growth, productivity and export value of the industry, alongside fairer working conditions; factors of which are crucial for the success of any industry. However, the Agriculture (Wales) Act 2023 is focused purely on 'Sustainable Land Management' outcomes, and targets are set to follow in relation to mitigating and adapting to climate change, maintaining and enhancing the resilience of ecosystems, the sustainable production of food and conserving and enhancing the countryside, cultural resources, public access and Welsh language¹. Whilst these are all vitally important (particularly for the purposes of 'Brand Wales' upon which food manufacturers rely on), the lack of equivalent targets for growth, productivity and fair working conditions, and the approach from Government to the Welsh farming industry is apparent.
9. Yet the integrity of the food industry is inextricably linked to their ability to procure Welsh food and drinks which contributes positively towards 'Brand Wales'. As an excellent previous Welsh food and drink marketing campaign quotes: *"This land sustains us"*² and *"Our food and drink has a deep connection to the landscape, the people and culture. You look after the land, and it looks after you"*. The visuals for the campaign includes farmers, farms, Welsh produce and land management, yet the food and drink industry is not required to procure Welsh ingredients in order to gain Government support nor to capitalise on 'Brand Wales'. Equally, Welsh primary producers also need a 'world class food and drink industry' to add value and process their products to achieve its potential. *"Welshness is seen to signify great quality, and there is a strong association between Wales and the countryside / nature"* (from the Action Plan).
10. Therefore, the FUW proposes that two additional objectives, or actions are added, which is to improve the processing capacity **in** Wales to retain circularity and brand potential, and to increase the proportion of Welsh produce **used** by Welsh processors, retailers and manufacturers. Support packages for primary producers such as Cywain should also be retained.
11. Furthermore, as the Welsh Government plans to create an Environmental Governance Body to monitor and advise Welsh Ministers on the development of environmental law and policy in Wales, the FUW believes that such a Body should be considered for the development of food policy in Wales in consideration of other national goals and objectives. This would involve the creation of targets relating to areas such as public procurement, food security (aligning with UK objectives), market trends and opportunities, processing capacity, similar to those the Environmental Governance Body will be expected to set for the protection and restoration of biodiversity.

¹ [The Agriculture \(Wales\) Act 2023 Introducing the Sustainable Land Management Framework](#)

² [This land sustains us | Business Wales - Food and drink](#)

12. As the Action Plan was published in 2021, more work should be done to ease the export administration burden and trading disruption the EU Exit has created. The importance of global trade to the functioning of the Welsh (and UK) food system is significant and longstanding. The EU remains the largest export market for Welsh agri-food exports despite the bureaucratic disruption and red tape caused by Brexit resulting in a 21% decline in UK exports since 2018.
13. In summary, the Welsh agricultural sector underpins both a large proportion of the social and economic activity that takes place in Wales' rural communities and a food and drink sector worth over £9.3 billion to the Welsh economy. The industry produces sustainable food to some of the highest animal health and environmental standards, supplying domestic and global commodity markets and targeting high-end customers through some of its Protected Geographical Indication (PGI) products.
14. Despite the economic challenges facing Welsh farming businesses and their current reliance on direct farm support, the Vision of farming in Wales goes far beyond bottom line profitability. The industry is built upon solid cultural and traditional foundations that will continue to thrive as long as Welsh people and their farming heritage receive the recognition they deserve.
15. Therefore, for the current and any future Welsh Government to genuinely champion the success of Wales' food and drink industry, the Vision and its associated objectives must reflect the entire supply chain from primary producers to consumers.

The effect decreasing numbers of livestock have on the ability of the processing sector to add value to Welsh produce

16. The declines in livestock numbers are well documented. Data from Hybu Cig Cymru demonstrates concerning trends in UK livestock numbers; a year-on-year decrease in the throughput of prime cattle and lamb of 5% and 4% respectively in February.
17. Whilst it is notable that such trends have resulted in record high prices for livestock producers, reductions in the critical mass of livestock has brought into question the sustainability and efficiency of red meat processing plants and the industry's ability to maintain consumer demand for Welsh products.
18. As with many businesses, the abattoir and processing sector relies on economies of scale and throughput. Whilst a tight supply of Welsh produce can often serve to provide higher prices back to the producer in the short term, it reduces the ability of the processing sector to retain profit margins, as well as fulfill supply obligations to retailers. Retailers (and particularly the food service sector) then favour products from other countries, often undercutting (and undermining) Welsh produce in the process. The recent trade deals struck with agri-food exporting countries (such as Australia, New Zealand and the Comprehensive

and Progressive Agreement for Trans-Pacific Partnership) is exacerbating this situation when coupled with a tighter Welsh supply.

19. Record domestic prices coupled with lower prices from the Southern Hemisphere and liberalised free trade agreements were responsible for a 40% surge in UK sheepmeat imports last year to around 70,000 tonnes, 86% of which originated from New Zealand and Australia.
20. Members of the Committee are encouraged to read the excerpt below from the Sustainable Farming Scheme Carbon Sequestration Evidence Review Panel report³, of which the FUW co-wrote, in regards to the ruminant supply chain and critical mass:

Excerpt from Sustainable Farming Scheme: Carbon Sequestration Evidence Review Panel: full report.

Chapter: Delivering the Sustainable Land Management Objectives

...One of the CCC's key recommendations is that, as a low-emissions producer of ruminant meat, the UK should not risk carbon leakage by sacrificing its own production in favour of importing goods to meet demand. Considering the evidence whilst comparing and contrasting alternative options with the existing SFS Universal Actions to assess which have the potential to sequester more carbon, the Panel were therefore mindful of economic, social, cultural and wider environmental impacts and carbon leakage effects.

To support this approach, the Panel assessed the status of Wales's livestock sector, recognising that carbon is one metric of sustainability. Figure 6 sets out Historic Welsh emissions from the agriculture sector (1990 – 2019) from the Net Zero Wales Carbon Budget 2 (2021 – 2025) report. That report acknowledges that total emissions from the agricultural sector in Wales have declined by 10% between the base year (1990) and 2019, driven largely by a general decline in livestock numbers and nitrogen fertiliser use.

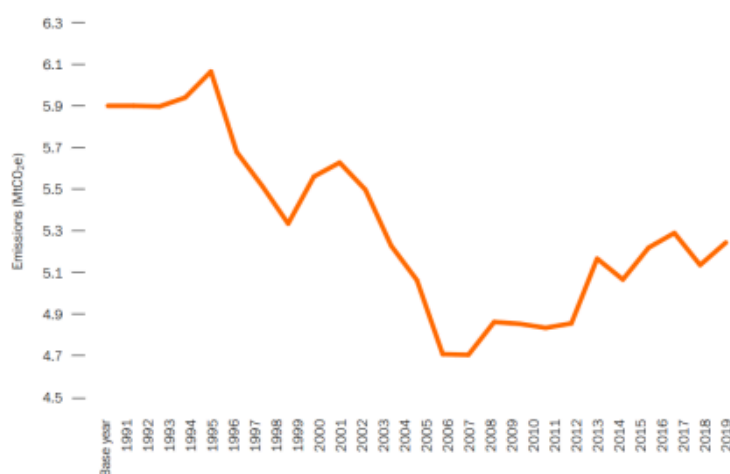


Figure 6: Historic Welsh emissions for the agriculture sector (1990-2019) from the Net Zero Wales Carbon Budget 2 (2021-2025) report, p.144

³ [Sustainable Farming Scheme: Carbon Sequestration Evidence Review Panel: full report](#)

In 2023 the Welsh aggregate agricultural output was valued at just over £2.2 billion, this is in no small part due to the contributions of the livestock sector. The red meat sector in Wales is directly responsible for the employment of 50,244 people and in 2023 alone, exports of Welsh red meat valued £267 million. Meanwhile, Welsh dairy production is worth almost £850 million to the Welsh economy, and accounts for almost 40% of the gross output of Welsh agricultural production. The sector also generates significant employment and more than 5,300 people are directly employed on Welsh dairy farms.

Agricultural supply chains across the world rely on a sufficient supply of livestock to function properly. The ruminant supply chain is a prime example of this: without adequate livestock numbers to create a workable margin, supply chain businesses such as abattoirs, veterinary practices, marts, feed suppliers, manufacturers, and traditional retail butchers may close or relocate. The agricultural supply chain in Wales supports employment in very rural areas, many of which are Welsh speaking communities. In the course of its review, the Panel reviewed current livestock numbers in Wales, as reported in the Welsh Government June Agricultural Survey to 2023. Survey results show that livestock numbers in Wales are currently in decline. The total number of sheep has fallen by 1,042,341 from 2004 to 2023 with a 9% decrease compared to 2019 alone, whilst cattle numbers have decreased by approximately 150,000 over the same period. Current British Cattle Movement Service (BCMS) data indicates a further future decrease in numbers, with a 4% decrease in calf registrations being seen in the first half of 2024 compared to the year earlier. Further reductions in livestock numbers were reported in the June 2024 survey.

The decrease in livestock numbers is not limited to Wales: the trend is mirrored across Great Britain for various reasons. The Panel recognises that livestock numbers are influenced by several factors including market requirements, productivity issues, agricultural regulation and support and the impacts of climate change. For example, modelling by AHDB suggests that to meet the Control of Agricultural Pollution Regulations (2021) limit of 170kg of N/ha from livestock manures, Welsh dairy farms would need to reduce cow numbers by 17% and reduce labour requirement by 894 people unless they utilise more land. An ADAS assessment of the evidence base for climate change action in the agriculture, land use and wider food chain sectors in Wales identified risks for livestock and grasslands in Wales arising from an increase in liver fluke and other diseases, increased wildfire risks, heat stress and reduced availability of imported animal feed. Any disruption to the functioning of the limited number of abattoirs in Wales would be especially pertinent as 75% of the throughput in Wales is processed by just 3 abattoirs. It should be noted that the number of Welsh abattoirs has fallen from 34 in 1995 to just 14 in 2024. Those 14 abattoirs allow for the production of red meat in Wales as well as a network of vital local butcher shops, local meat suppliers, and direct sales for diversifying farm businesses.

The Panel learnt through their literary review and from expert witnesses that emissions reductions in Welsh agriculture are achievable, with one study citing an average GHG emissions reduction potential of 28% [range 19% – 35%]. The same study modelled individual farm pathways to Net Zero on sheep and beef farms in Wales. The study showed that to achieve this required ambitious GHG emissions reductions on all farms and reported that the farm requiring the highest area of woodland planting (if using carbon sequestration as an offset to reach net zero), was also the most efficient farm with the lowest emissions on a per kg of product basis. Therefore, whilst the Panel recognises that action is needed to offset residual emissions, it should not result in production being displaced to less efficient systems.

Impact of regulation – A Case Study

A year-on-year drop of 0.5% has been observed in the size of the dairy herd and there are a range

of factors identified as impacting on livestock numbers within the sector including the Control of Agricultural Pollution Regulations (2021). The potential production impact of the 170 kg/ha N limit from livestock manures has been modelled by the Agriculture and Horticulture Development Board (AHDB).

Based on figures in Schedule 1 of the Regulations, AHDB Dairy have determined that the average stocking density would need to be no more than 2.13 animals per ha including all dairy animals. This equates to a Livestock Unit (LU) stocking rate of 1.67 LU per ha, on the basis of the current age structure of the Welsh herd.

The average stocking density for dairy farming in Wales is not currently known, although comprehensive information on this was collected for the Welsh Conditional Aid (WCA) programme (relates to 2015/16)²³.

Based on the WCA data, the average stocking density on Welsh farms in 2015/16 was 2.56 animals per ha. Applying this to the weighted N produced from the current Welsh herd would suggest 204kg of N is produced per ha, above the new limit of 170kg of N per ha by 20%.

To meet the new limit of 170kg of N per ha the stocking density would need to reduce by 17%, when accounting for all animals. Assuming that the stocking density is lowered strictly through reducing the number of animals in the enterprise, this would lead to an equivalent reduction in milk production of 17%, equating to 336 million litres.

- Impact on Dairy Farms: No. of dairy producers - 1490
- Total adult dairy herd in Wales (over 2 years) - 252,200
- Milk production in Wales - 2 billion litres annually
- Data collected for the WCA programme showed the average farm uses 3 ½ staff - this equates to a full-time worker for every 48 adult cows

This suggests that a 17% reduction in cows would mean a labour requirement reduction of 894 people. This is based on the assumption that every farm would be able to remain viable and continue in milk production on the lower cow numbers, lower milk production and resultant loss of income. This is unlikely to be the case so the job losses could in fact be much higher.

There is a corresponding impact on the supply chain as demonstrated by Farmers Guardian in their article highlighting the concerns of South Caernarfon Creameries on 17th August 2022. Based on high level analysis undertaken by the co-operative which takes 150 million litres of milk annually from 147 suppliers in Mid and North Wales it has been suggested that overall milk volumes in Wales could be reduced by up to 27%. Alun Wyn Jones, the Managing Director suggested that this could wipe £20m off the annual turnover of the business putting jobs and investment at the business at risk.

21. The extract above and its context demonstrates how overarching ambitions relating to climate change and the environment are often prioritised over other fundamental objectives, particularly in relation to agricultural and food policy.
22. It is therefore essential that, through a Statutory Body, the Welsh Government is mandated to give full consideration to the economic, social, cultural and environmental importance of Welsh food when considering advice on policies relating to the nature and climate crises and setting its Vision and objectives for the food and drink industry.

What the Welsh Government can do to further support the processing sector to increase added-value for food products in Wales, particularly for the red meat, dairy and horticulture sectors

23. The FUW recently co-signed a letter sent to the Welsh Government (see Appendix X) highlighting the critical loss of small and local abattoirs in Wales, and the threat this poses to sustainable farming, biodiversity restoration, Welsh produce, Wales' circular economy and animal welfare.
24. In 1990 there were 58 abattoirs across Wales, whereas now there are just 15 with only 5 of those being classed as 'small'. Even fewer are able to offer vital services for direct selling and added value sales, such as private kill and further processing (butchering, packaging, labelling), as well as the ability to slaughter native breeds, horned cattle, different species and smaller batches of animals.
25. The letter includes some key recommendations for the Welsh Government:

We therefore urge Government to take action in the following areas:

Recognise the small abattoir network as Critical National Infrastructure for Wales and make an explicit commitment to ensuring Wales has a diverse network of abattoirs offering the right services in the right places.

Carry out a strategic assessment of need, working with the existing abattoir network as well as farming groups to assess capacity, location and services, as part of planning for the key infrastructure to underpin sustainable farming.

Work with industry and the Abattoir Sector Group to identify and explore solutions and consider merits of capital grant schemes or other funding mechanisms. Support should be tailored to existing abattoirs as well as potential new abattoirs including on-farm or mobile units.

Ensure the small abattoir discount is maintained to enable the small abattoir sector's immediate survival.

Support a wider review of the regulatory system to ensure it is fit for purpose, risk based, proportionate and cost effective.

26. Given the importance of red meat as a proportion of total Welsh agricultural output, consideration of Welsh processing capacity and particularly that provided by small and local abattoirs is a key omission to the Welsh Government's Vision for the food and drink sector.

27. Whilst the collaborative layer of the Sustainable Farming Scheme is expected to provide additional opportunities for adding value to Welsh produce and supplying local markets, having the infrastructure in place is a critical enabler. In addition to the support packages outlined in the joint letter, the planning system can also be a barrier to expanding processing capacity and directly selling to consumers.
28. For the promotion of both premium products such as PGI Welsh lamb and beef and other goods that enter mainstream commodity markets, the industry relies on having effective levy boards in place that continue to develop market opportunities domestically and internationally.
29. Given that the UK operates in an international context, and as other countries face increased difficulties in producing their own food due to extreme weather events, conflict or political agendas, and the global population continues to increase at a rapid rate, the ability for Wales and the UK to produce its own food will increase in value on a global scale as the effects of climate change (and other global events) are further realised.
30. As such, both the Welsh and UK Governments must empower the agricultural sector as a world leader in sustainable food production first and foremost and as an industry that holds many of the answers to climate change and environmental protection.

The barriers to increasing the public procurement of food processed in Wales

31. Whilst public procurement represents a relatively small percentage of the industry's turnover, the FUW believes that all Government departments and public bodies have a duty to lead by example by supporting Wales' farming and food industry.
32. As outlined, the FUW believes the Industry Vision should include a target to increase Welsh public sector procurement from the current 52%, as the previous Welsh Labour Government - Plaid Cymru Co-operation Agreement stated. The local procurement of food through establishments such as schools provides an opportunity for authorities to shorten supply chains, support the high environmental and animal welfare standards Welsh farmers must adhere to, and bolster circular economies while avoiding the implications of cheaper food imports on public health and the environment.
33. The FUW have long since lobbied on the matter of public procurement, and its contribution to maintaining a strong domestic production and processing base:

The FUW calls on Local Authorities to:

- Proactively support local processors and abattoirs and an expansion of food processing capacity, in order to create jobs and retain a greater proportion of supply chain value in Wales
- Recognise that local procurement represents an opportunity for public spending to invest in Welsh businesses and jobs
- Recognise the benefits to the environment and the National Health Service of procuring higher quality Welsh produce
- Ensure that the implementation of policies and statutory regulations do not discourage the opening of new abattoirs and processing facilities or lead to further closures of current businesses
- Instigate procurement policies which encourage the creation of new companies and cooperatives in order to bring benefits to local employment
- Meet regularly with retailers and processors in order to encourage transparency and fairness within the food chain, and equitable practices and farmgate prices which support Wales' farmers and economy

From FUW's County Council Election Manifesto 2022⁴

34. There is a clear role for bolstering Welsh processors, wholesalers and the commodity market within public procurement. Added value, or 'niche' products are often unlikely to have the scale, availability of supply, carcass balance in the case of red meat, or price point to suit stretched Local Authorities. However, a large proportion of Welsh farmers would supply mainstream commodity markets, therefore, if the processing and wholesale supply was based in Wales, the procurement process could be made far simpler.
35. However, making procurement more accessible to seasonal and time limited products should also play a part in removing barriers to public procurement contracts.
36. The nature of some procurement contracts means that what appears to be a commitment to procuring Welsh and UK produce within procurement rules can be circumvented by carefully worded clauses. For example, procuring food within a '60 mile radius', when the entire width of Wales is between 40 and 100 miles to the English border. Furthermore, these can often include food wholesalers, who source their supply from a far wider base (including imported products).
37. Public procurement strategies must extend to building relations and understanding between production and consumption whilst also recognising the complexity of UK food systems and the real definition of UK (rather than Welsh) food security. This should involve raising awareness of the health benefits associated with Welsh food and drink products and how this aligns with the objectives of the Wellbeing of Future Generations Act, the Health System and the Welsh Government's ambitions for green spaces.

⁴ [FUW County Council Election Manifesto 2022](#)

38. In anticipation of the 2026 Senedd Elections and as various Members of the Senedd and prospective members from different political parties outline their ambitions to increase Welsh public sector procurement, they must ensure that future policies meaningfully achieve their objectives for the benefit of Welsh food producers and consumers.

Appendix A

[Joint industry letter on Wales' local abattoir network](#)



Huw Irranca-Davies MS
Senedd Cymru
Cardiff Bay
Cardiff
CF99 1SN

27th of May 2025

Subject: Wales' local abattoir network

Dear Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs,

We are writing to urgently highlight a critical yet often overlooked part of Welsh farming infrastructure. The startling loss of small and local abattoirs in Wales, as across the rest of the UK, poses a threat to sustainable farming, biodiversity restoration, Welsh produce, Wales' circular economy and animal welfare.

We, as organisations concerned particularly with the future of sustainable farming and nature restoration, which depends significantly on pastoral grazing by native breeds, would welcome the opportunity to discuss these issues with you and your officials.

Wales now has only nine small-medium sized abattoirs, with only five being officially classed as 'small'. These abattoirs offer vital services such as private kill and further processing for direct selling, as well as the ability to slaughter native breeds and smaller batches of animals, that larger abattoirs usually do not provide.

Eight abattoirs have closed across Wales in recent years. William Lloyd Williams in Machynlleth closed in 2021 following 91 years operating as a successful family business, and Hugh Philips' Gower Butcher and small abattoir closed last year after 150 years of supplying local meat. Closures have reportedly been due to high running costs, excessive paperwork and the burden of regulation. The remaining small abattoirs are also struggling with these costs and demands, leaving them at risk of closure or reduced services. A survey of four small abattoirs in November 2024 found them all to be struggling, with one considering closure due to high running costs (please see our separate briefing for more information).

As farming and conservation organisations, the vulnerability in this supply chain was highlighted to us last year with the temporary closure of the only small abattoir in Eryri. This closure caused significant disruption, increased transport distances for livestock, and left producers questioning the sustainability of their chosen business models. The loss of this vital component in the supply chain, and lack of alternatives in the area, would render conservation grazing in this landscape which has the highest level of protection under both



Rhwydwaith
Ffermio
er Lles
Natur



Nature
Friendly
Farming
Network



Ymddiriedolaeth Natur
Gogledd Cymru
North Wales
Wildlife Trust



PASTURE PORFA
FOR LIFE AM OES

Plantlife



RBST

Rare Breeds Survival Trust



CYMRU



Sustainable
Food Trust

UK and EU Law, unviable. Priority habitats across Wales such as peatland, species rich grasslands, heathland and saltmarsh can only be enhanced and maintained in good ecological condition by sustainable grazing. Furthermore, the hardy native livestock required for this grazing often have less commercial value in livestock markets. This necessitates direct and farm-gate sales to local consumers, and meets a rising demand for traceable, sustainable meat that supports the landscape in which it is reared.

If the Sustainable Farming Scheme is to be effective in achieving all four 'Sustainable Land Management' outcomes, then the link between the production of nutrient-dense beef, lamb or dairy and the maintenance and expansion of these farmland habitats needs to be recognised and farmers must be supported to sell their produce locally. This is particularly relevant given the recent trade deals struck with Australia, New Zealand, the US and the CPTPP. Welsh farmers are being asked to compete on global commodity markets, whilst delivering far higher environmental and animal welfare standards, yet are increasingly unable to have their livestock processed and sold locally and differentiate themselves, due to this supply chain failure.

Small abattoir closures also undermine animal welfare as livestock are transported on increasingly long journeys to slaughter. Casualty and emergency slaughter services, whereby an animal is fit for human consumption but not fit for transport (i.e. it is injured) are also now very hard to access. Furthermore, only one slaughterhouse located in Wales has the contract to process Bovine TB reactors, resulting again in longer journeys for cattle. Remaining abattoirs are under huge strain and farmers now have to book several weeks in advance to guarantee a slot.

The Food Standards Agency's current review of the small abattoir discount has also added significantly to the level of concern. The current discount for small abattoirs who currently receive up to 90% off meat inspection charges needs to continue. If this discount were to be removed or significantly reduced the Association of Independent Meat Suppliers estimate 40% of small-medium sized abattoirs would close. This was discussed at a Westminster Hall debate on 8th May, with two Welsh MPs, Ben Lake and David Chadwick, speaking eloquently on the issue and calling for support.

We therefore urge Government to take action in the following areas:

1. **Recognise the small abattoir network as Critical National Infrastructure for Wales** and make an explicit commitment to ensuring Wales has a diverse network of abattoirs offering the right services in the right places.
2. **Carry out a strategic assessment of need**, working with the existing abattoir network as well as farming groups to assess capacity, location and services, as part of planning for the key infrastructure to underpin sustainable farming.
3. **Work with industry and the Abattoir Sector Group to identify and explore solutions** and consider merits of capital grant schemes or other funding mechanisms. Support



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Sustainable
Food Trust

should be tailored to existing abattoirs as well as potential new abattoirs including on-farm or mobile units.

4. **Ensure the small abattoir discount is maintained** to enable the small abattoir sector's immediate survival.
5. **Support a wider review of the regulatory system** to ensure it is fit for purpose, risk based, proportionate and cost effective.

We would welcome the opportunity to discuss these issues and potential solutions further and **would therefore like to invite you to visit a small abattoir** to hear directly from the sector and from those who rely on it.

Yours Sincerely,

Ian Rickman, President, Farmers' Union of Wales
Hywel Morgan, Chair, Nature Friendly Farming Network
Frances Cattanaach, CEO, North Wales Wildlife Trust
Jimmy Woodrow, Chief Executive, Pasture for Life
Lesley Fletcher, Head of Plantlife Cymru
Christopher Price, CEO, Rare Breeds Survival Trust
Arfon Williams, Head of Land and Sea Policy, RSPB Cymru
Patrick Holden, Chief Executive, Sustainable Food Trust

Copy sent to:

Animal and Plant Health Agency
Wales' Chief Veterinary Officer
Food Standards Agency
Hybu Cig Cymru
Welsh Government Land Reform Division
Ben Lake, Member of Parliament for Ceredigion Preseli
Dave Chadwick, Member of Parliament for Brecon, Radnor and Cwm Tawe