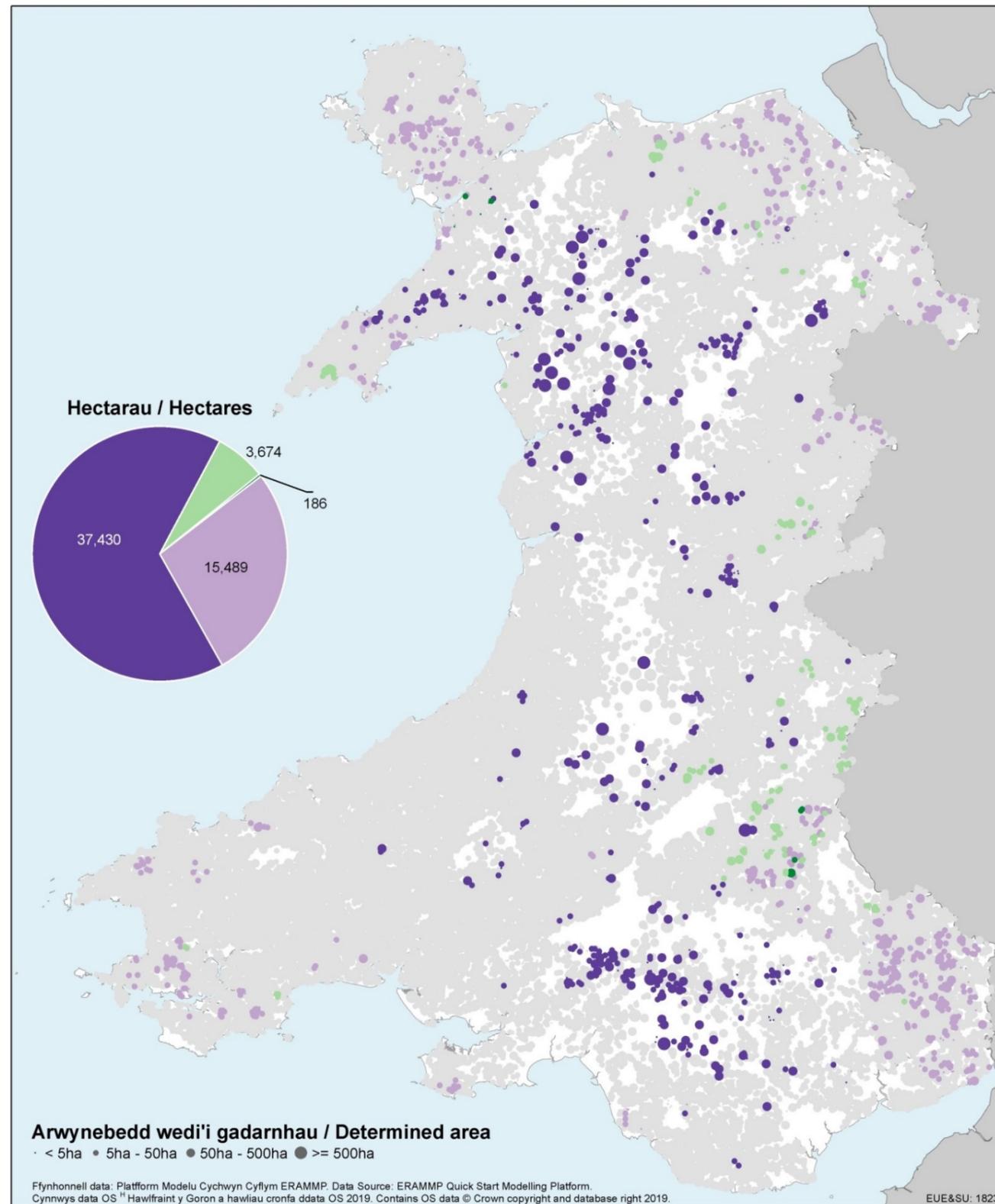


# UK agrees EU deal



## Modelled land use change under “EU Deal” scenario

An EU deal maintaining trade arrangements with the EU-27 is closest to business as usual. There will be some increase in trading costs (NTB – non tariff barriers) which will put pressure on lamb prices. The model predicts a reduction of 37,430 ha in land used for sheep within the SDA (severely disadvantaged). The UK is not self sufficient in dairy and UK dairy consumption continues to grow, an increase of 15,675 ha in land used for dairy is predicted, this land taken from lowland/DA (disadvantaged) land, currently beef and sheep farms.

The SDA land would carry less sheep with a possible increase in the area of woodland and forest; there may also be a reduction in stocking density on some hill farms which reduce sheep numbers to keep a flock that can be sustained without inputs of feed and fertiliser.

## Modelled land use change under different Brexit trading scenarios – all maps

**The maps show modelling outputs but do not represent Welsh Government policy**

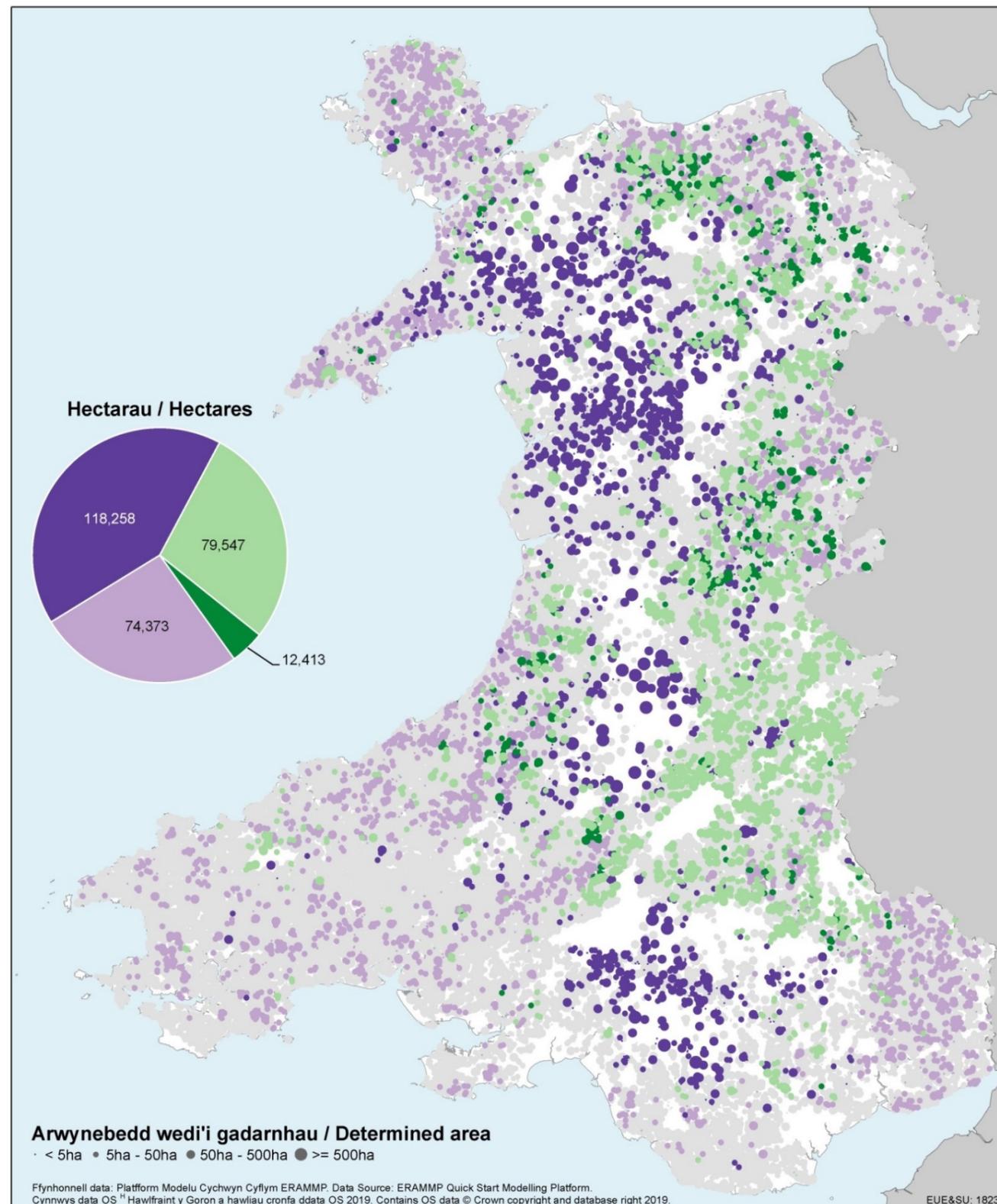
Maps have used land data held by the Welsh Government and ascribed a “Robust Farm Type” as defined by Farm Business Survey rules. Changes to RFT have been decided according to modelling rules based on assumed changes to farm gate prices resulting in either increases or reductions in the dairy, beef and sheep sectors by 2025 after the UK has left the EU. The model assumes current levels of farm support. Farms that have changed RFT and are geographically close have been combined into a circle proportional to their combined area, such that Individual farms cannot be identified. Further detail on the scenarios can be found here:

[https://gov.wales/sites/default/files/publications/2018-12/eu-exit-scenario-planning-workshops-summary\\_0.pdf](https://gov.wales/sites/default/files/publications/2018-12/eu-exit-scenario-planning-workshops-summary_0.pdf)

- Modelling suggests land converts from SDA specialist sheep to beef
- Modelling suggests land converts from SDA specialists to dairy
- Modelling suggests land converts from mixed grazers to dairy
- Modelling suggests land converts from SDA sheep to other land use
- Land included in model simulation



## “No Deal” scenario



### Modelled land use change under a “No Deal” scenario

If the UK leaves the EU without a deal, there would be considerable disruption to established supply chains with reduced farm gate prices, leading to considerable change in land use. Modelling predicts 79,547 ha of SDA (severely disadvantaged) sheep land would convert to beef, mainly from increased rearing of dairy beef. Dairy would increase by 86,786 ha, using land from beef and sheep farms. A further reduction of 118,258 ha of SDA land used for sheep would be released.

Land released in the SDA may be used to increase the area of woodland and forest. There may also be a reduction in stocking density with farms keeping only the number of livestock that can be sustained on the land with lower inputs of purchased feeds and fertiliser.

### Modelled land use change under different Brexit trading scenarios – all maps

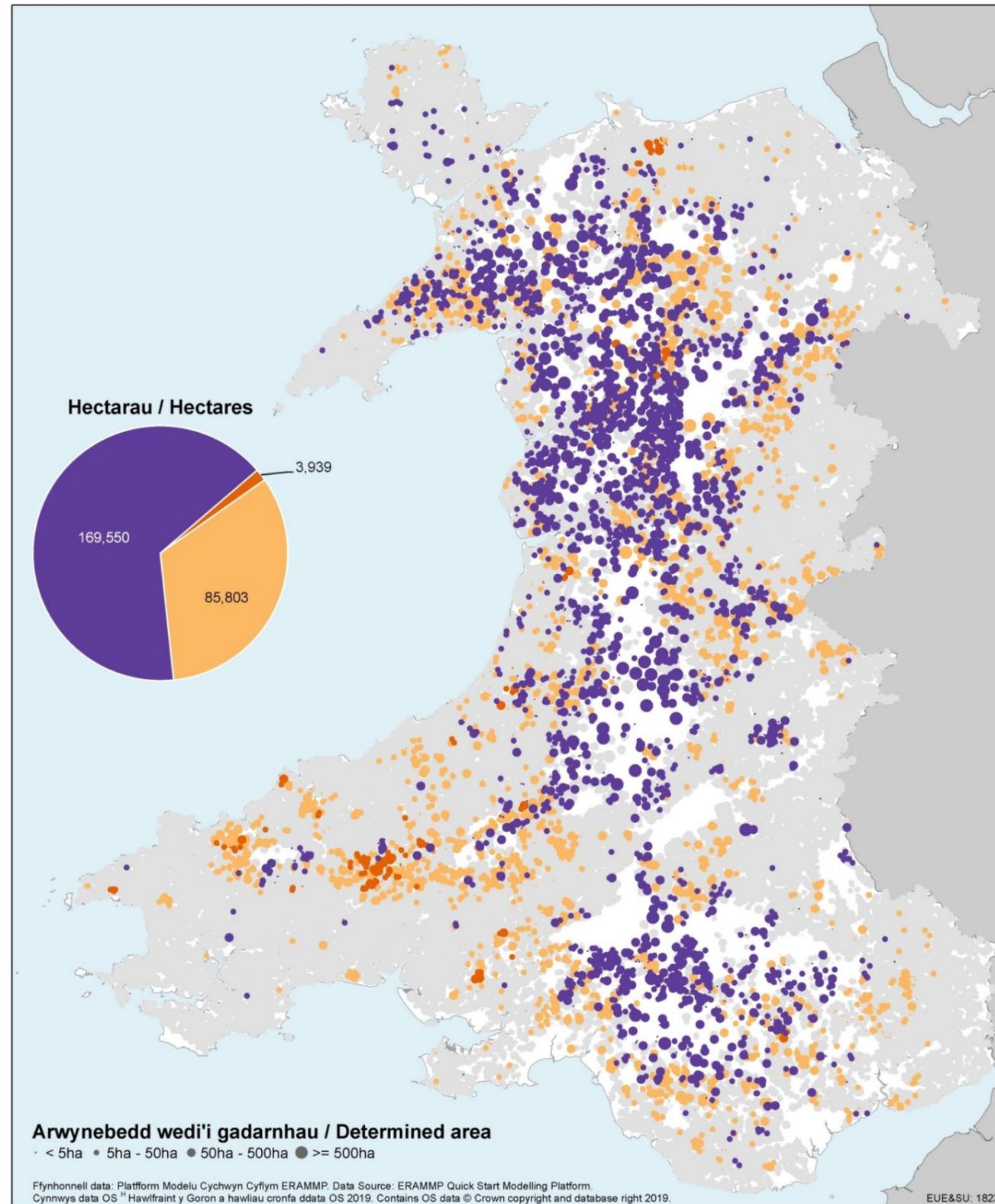
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# Multilateral Free Trade Agreements (FTA)



## Modelled land use change under a Free Trade Agreement (FTA) scenario

Within a FTA scenario there is a reduction in land used for dairy, beef and lamb production as home production comes under pressure from lower prices in global commodity markets. Modelling predicts 259,292 ha would be released from agricultural production as farm gate prices for milk and livestock fall. Land released is mainly in the SDA (severely disadvantaged) with far less change on more agriculturally productive land. Future land use for the large area released is uncertain. Some land will be used to increase the area of woodland and forest. There may also be a reduction in stocking density with farms keeping only the number of livestock that can be sustained on that area of land.

## Modelled land use change under different Brexit trading scenarios – all maps

**The maps show modelling outputs but do not represent Welsh Government policy**

Maps have used land data held by the Welsh Government and ascribed a “Robust Farm Type” as defined by Farm Business Survey rules. Changes to RFT have been decided according to modelling rules based on assumed changes to farm gate prices resulting in either increases or reductions in the dairy, beef and sheep sectors by 2025 after the UK has left the EU. The model assumes current levels of farm support. Farms that have changed RFT and are geographically close have been combined into a circle proportional to their combined area, such that individual farms cannot be identified. Further detail on the scenarios can be found here:

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