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United States Department of Agriculture

USDA's  
93rd  
Annual

# Agricultural Outlook Forum

## A New Horizon: The Future of Agriculture

February 23-24, 2017 • Crystal Gateway Marriott Hotel, Arlington, Virginia

Presentation from the USDA Agricultural Outlook Forum 2017

United States Department of Agriculture  
93<sup>rd</sup> Annual Agricultural Outlook Forum  
“A New Horizon: The Future of Agriculture”

February 23-24, 2017  
Arlington, Virginia

# **Brexit - UK farming steps out into the world**

USDA Outlook Forum

Paul Temple

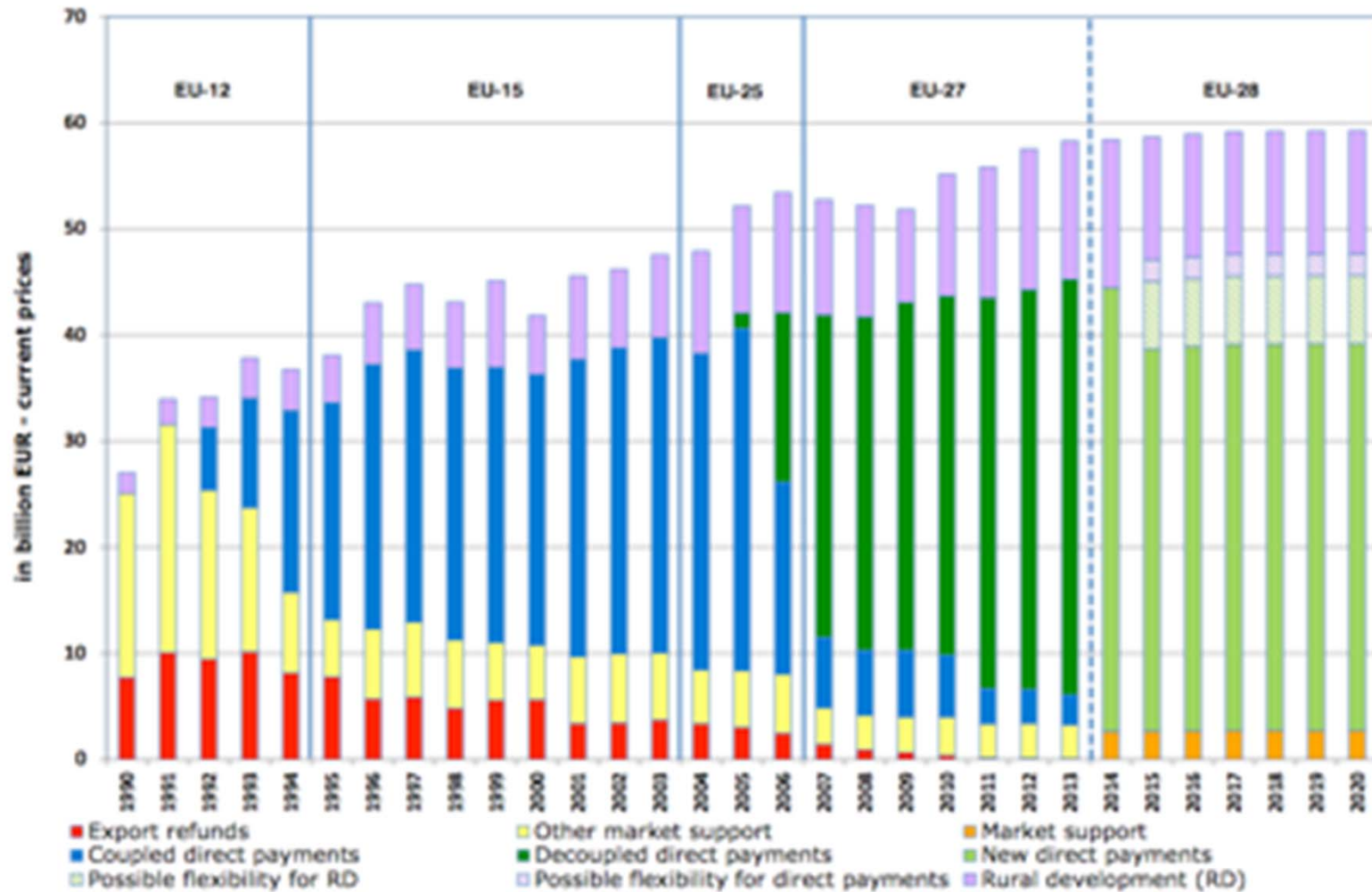
# The EU



In numbers:

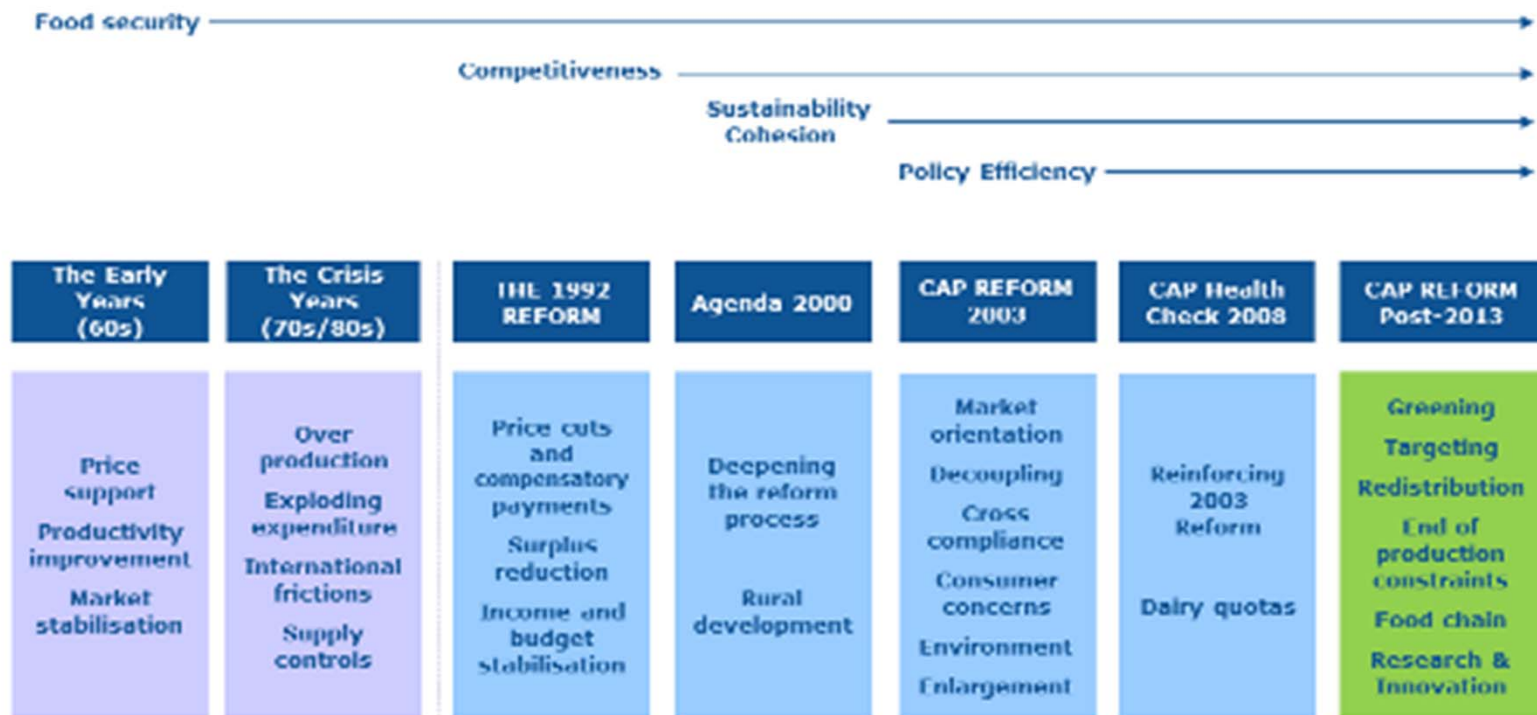
- 28 member states
- Covering 1.7 million square miles
- 500 million people
- 10.8 million farmers
- 431 million acres of farmland

# CAP and its policy levers



# The evolution of the Common Agricultural Policy

## Historical development of the CAP (1962 →)



# A policy for UK Agriculture



# Our support for the industry

<http://www.ahdb.org.uk/news/EUReferendum>



*Making sense of the issues*  
Helping the industry navigate the best path  
through Brexit

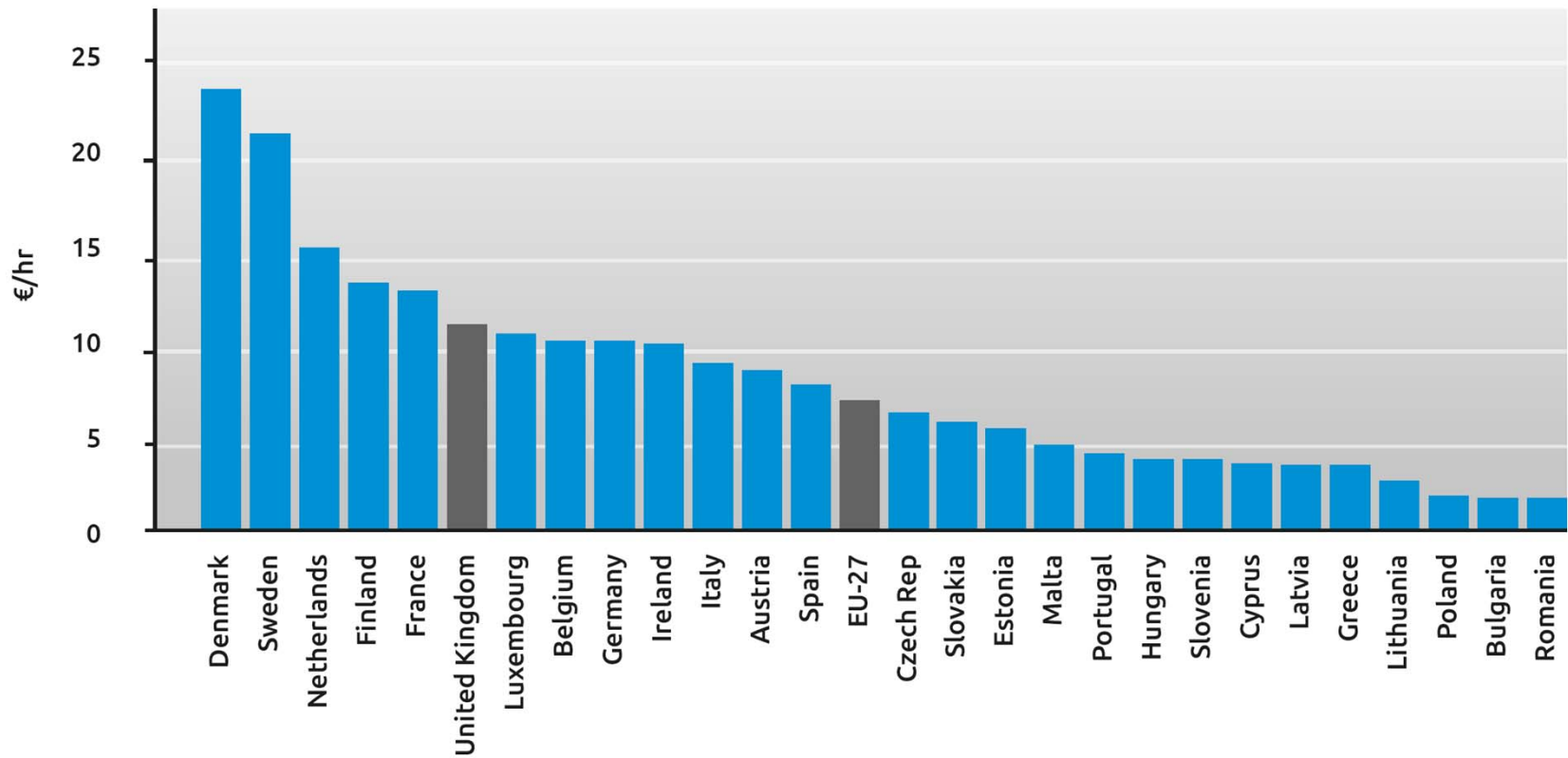


# The impact of Brexit on the UK agricultural workforce



## Average wages euro/hour by country (2012)

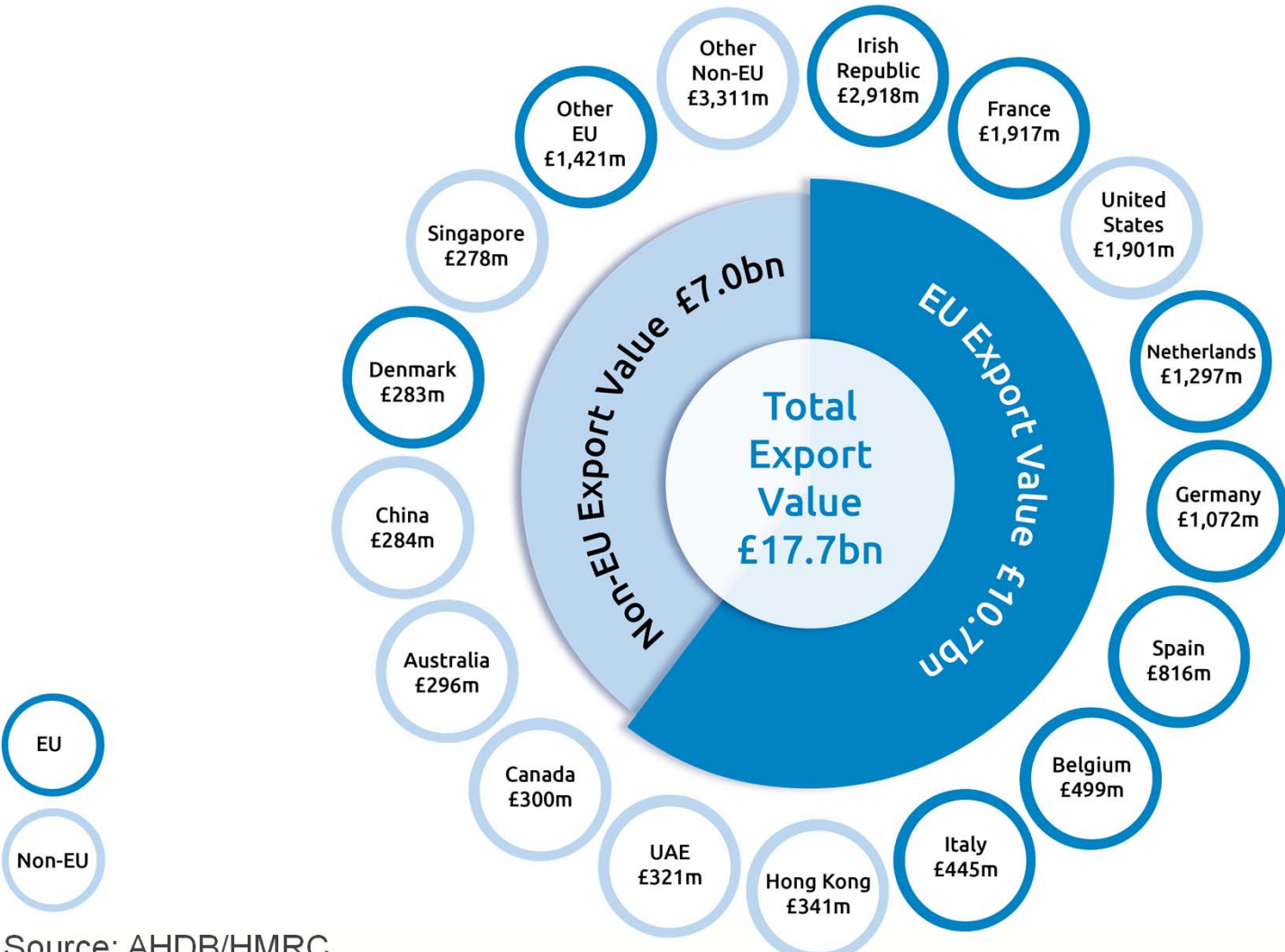
Source: Farm Accountancy Data Network 2012





What might  
Brexit mean  
**for UK trade**  
in agricultural  
products?

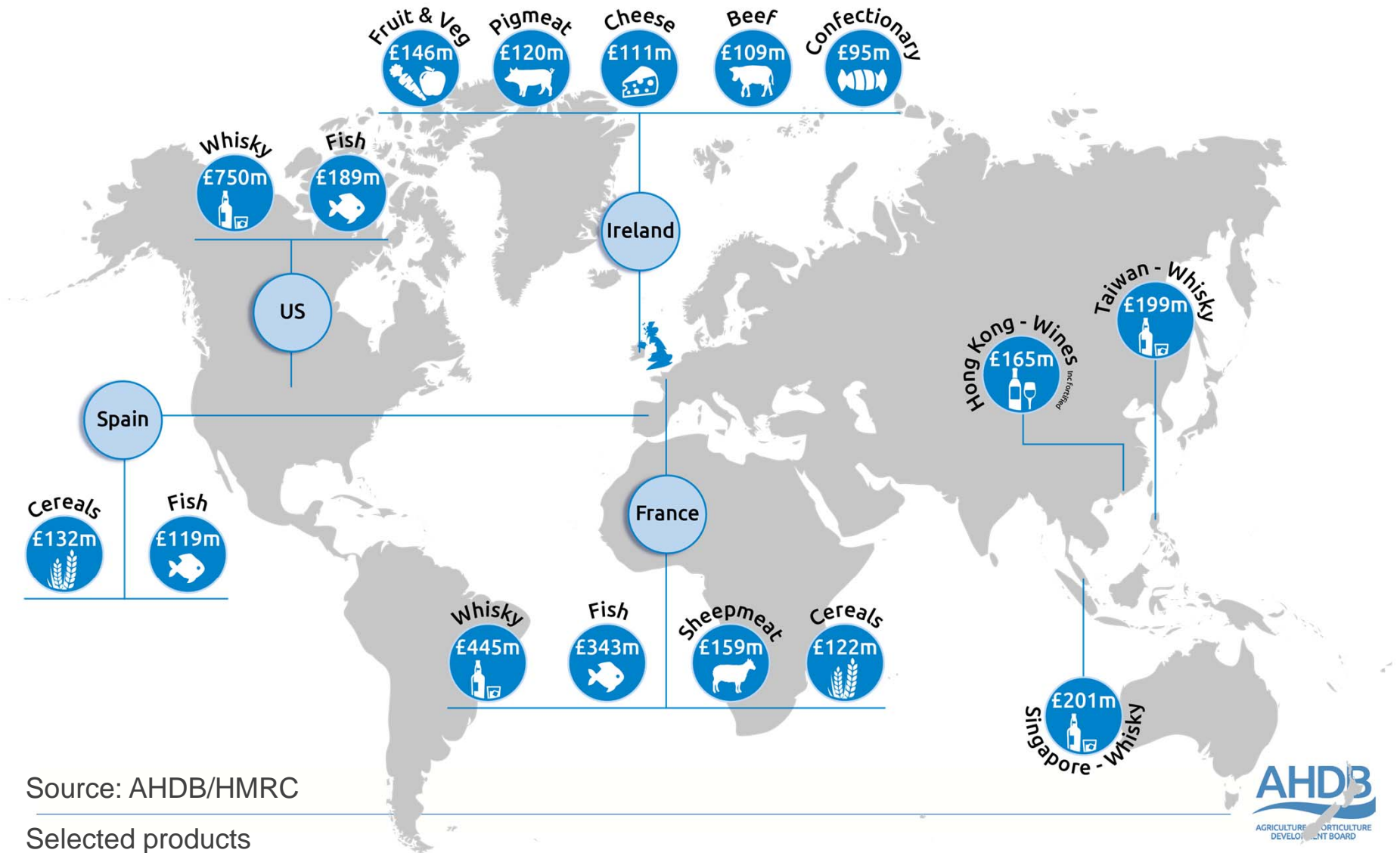
# 2015 UK food and drink export values by destination



Source: AHDB/HMRC

Note: Includes alcohol

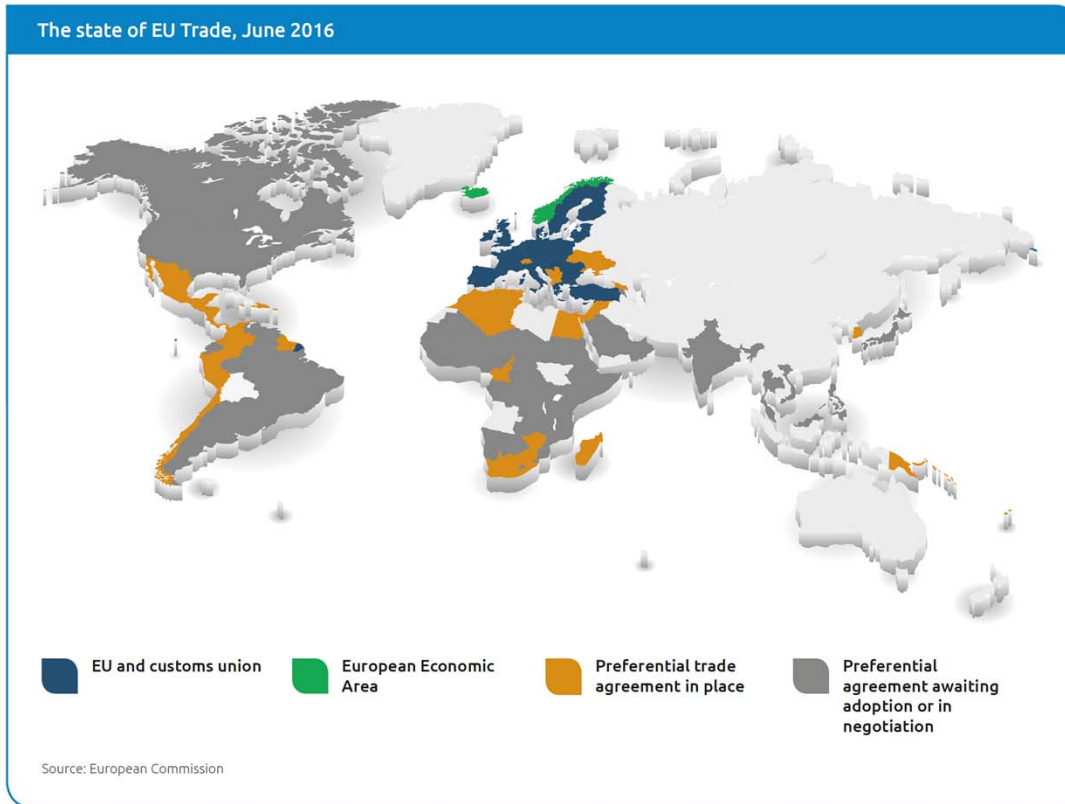
# UK exports – key products and markets



Source: AHDB/HMRC

Selected products

# Shifting trade deal dynamics?

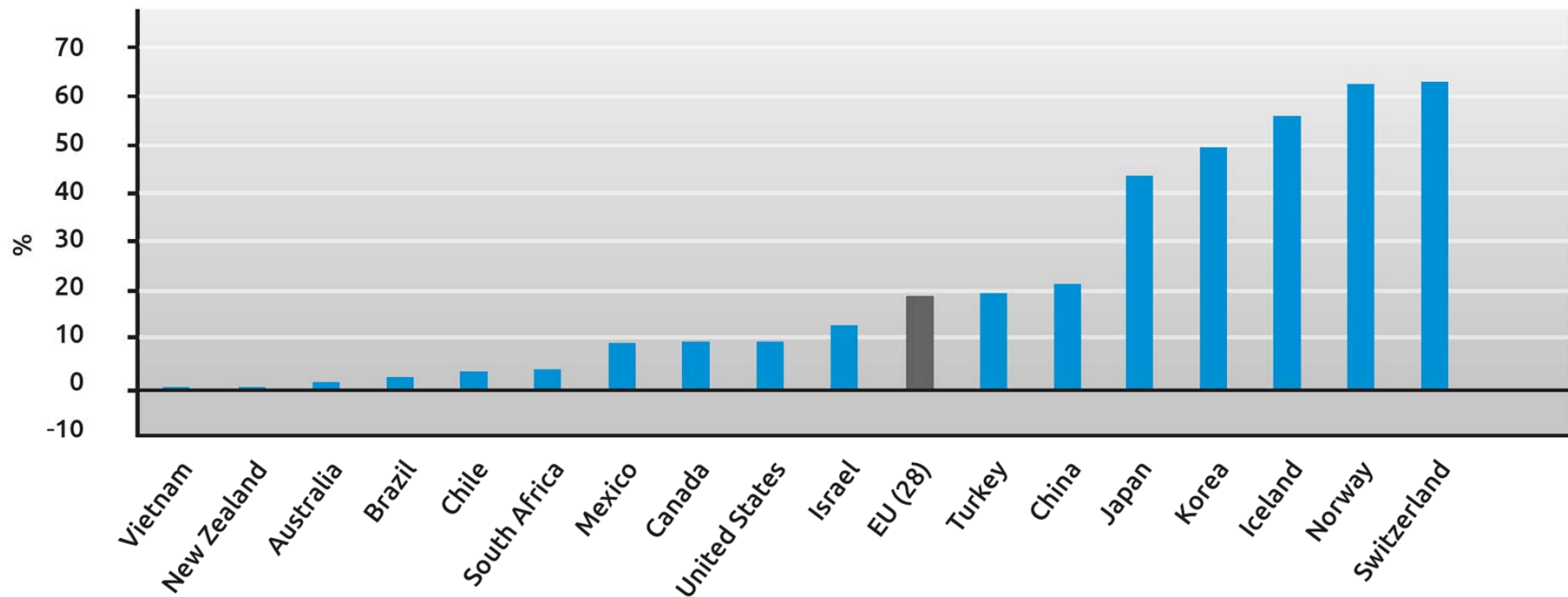




Agricultural  
policy models

# Agricultural support levels

Producer Support Estimate by country in 2015



Source: OECD

UK Governments have been critical of value for money offered by Pillar 1 direct payments, but funding guaranteed until 2020.





**AHDB Strategy 2017 - 2020**  
Inspiring Success