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## 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

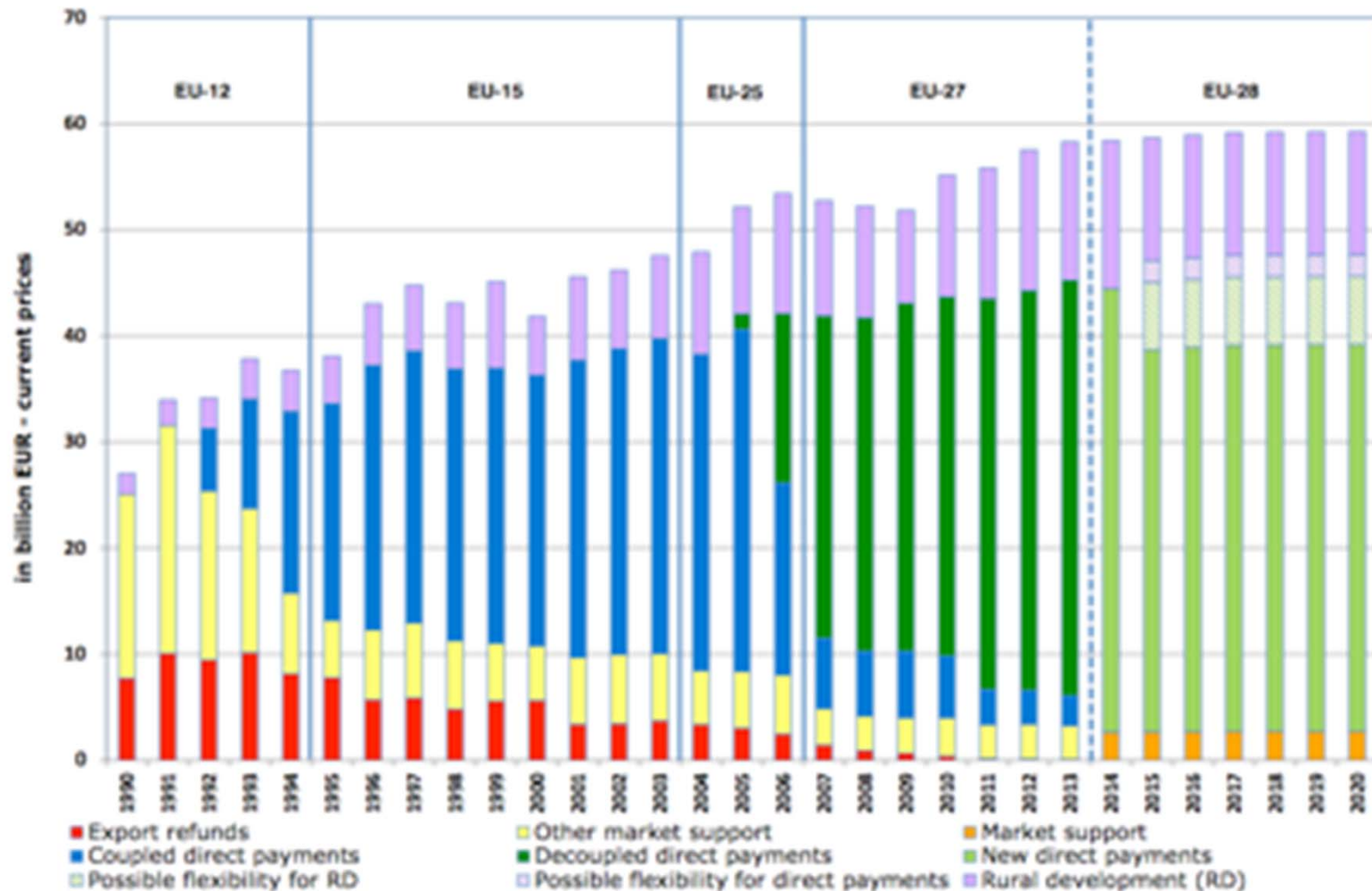


In numbers:

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

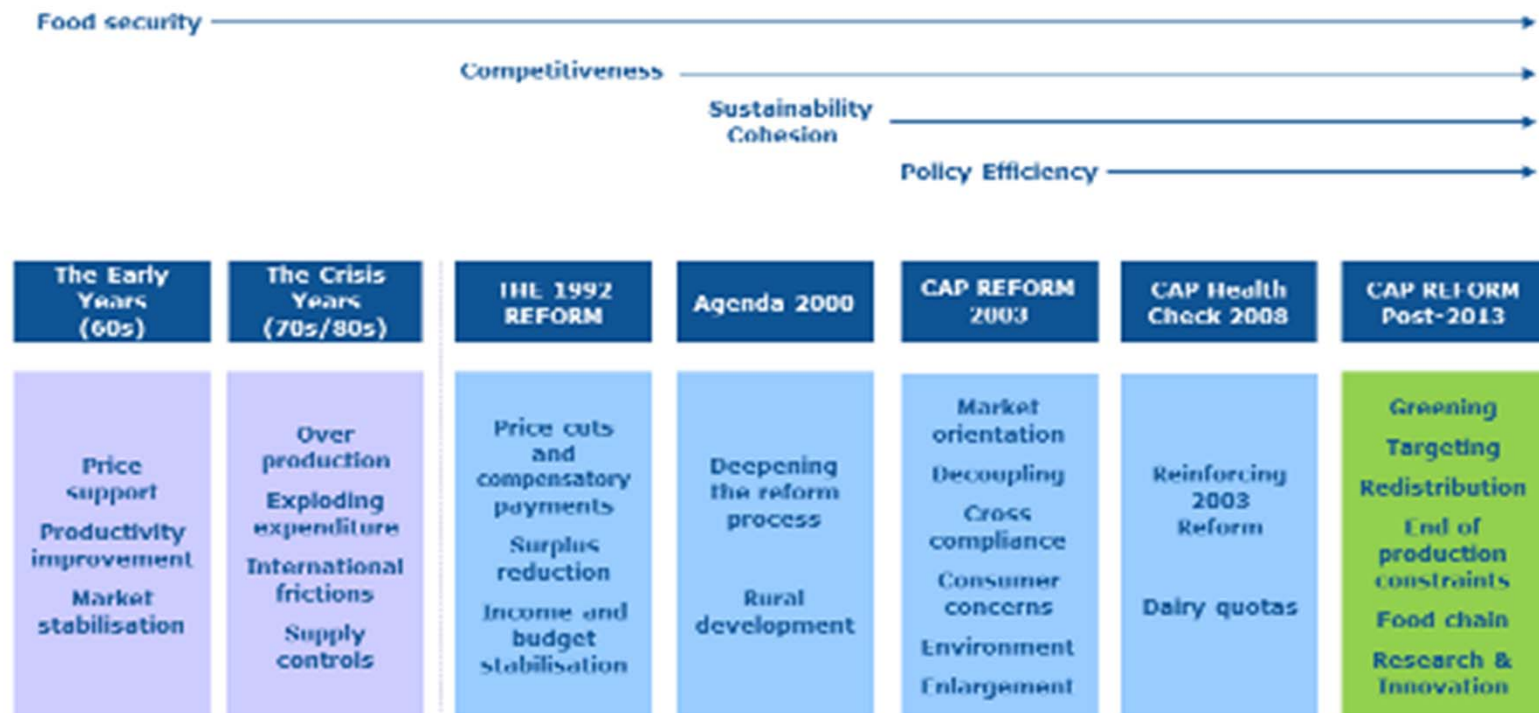


# CAP and its policy levers



# 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>



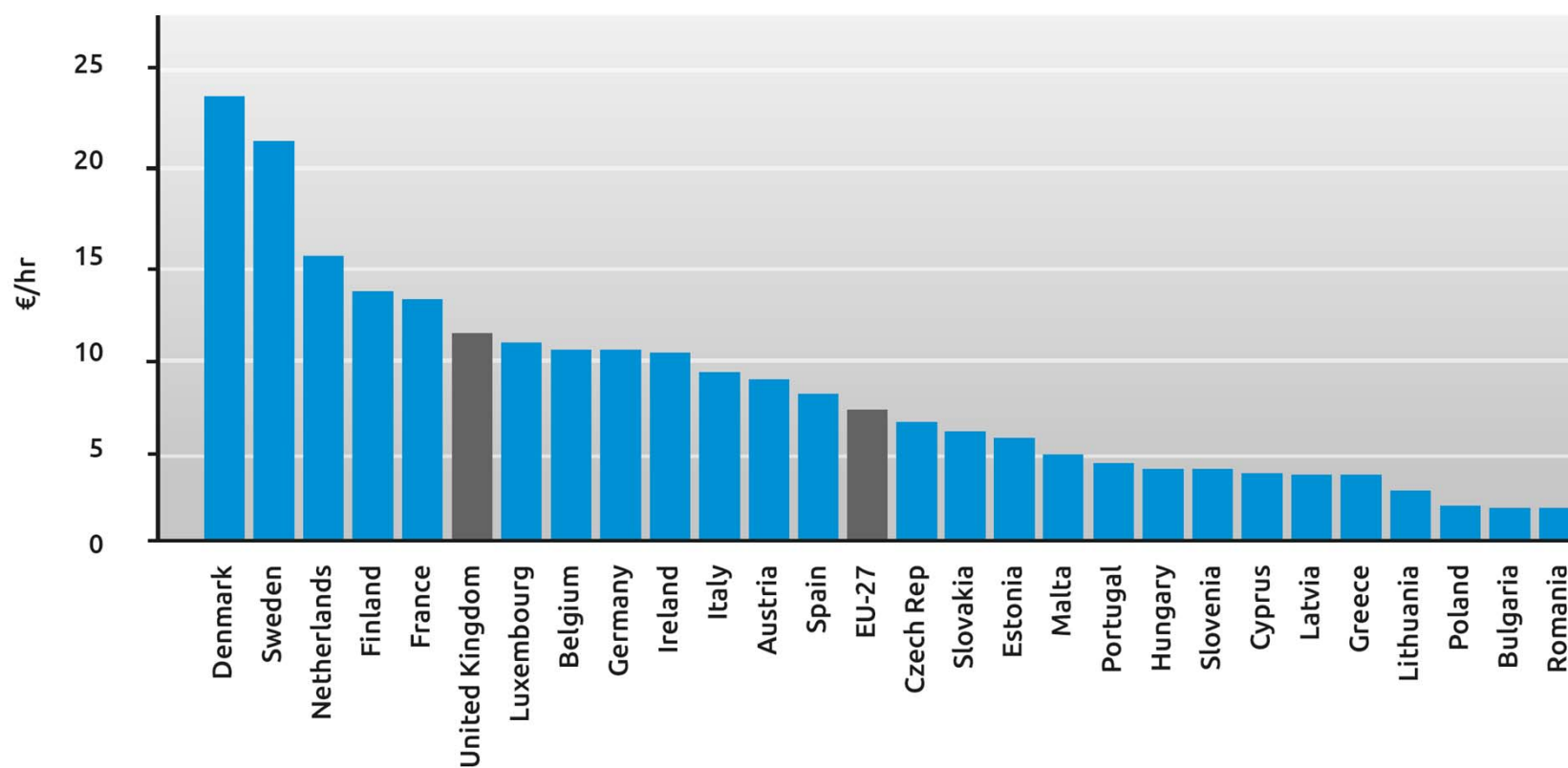
*Making sense of the issues*  
Helping the industry navigate the best path  
through Brexit

# The impact of Brexit on the UK agricultural workforce



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

Source: Farm Accountancy Data Network 2012

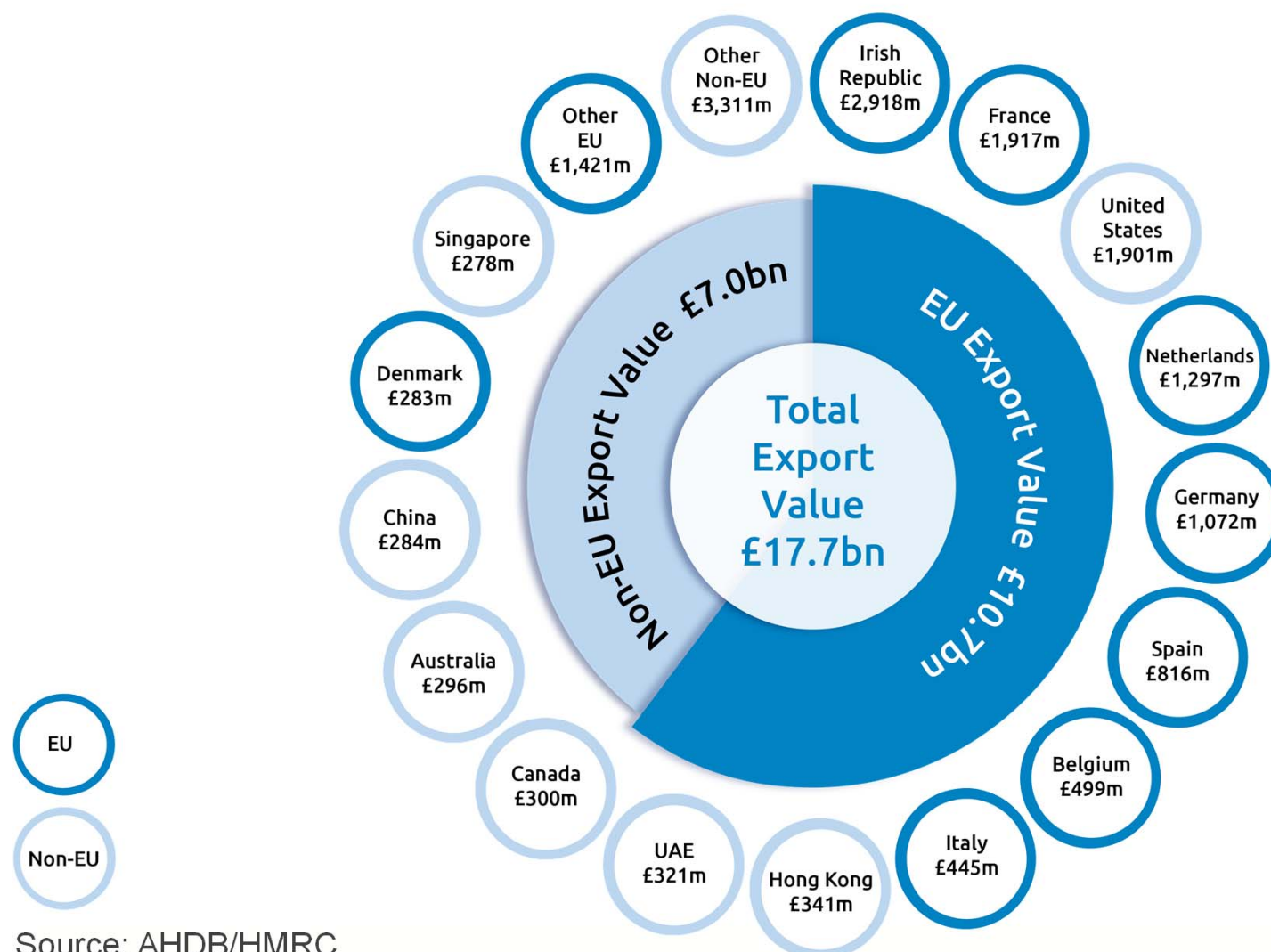




A large cargo ship with a white superstructure and a dark hull with a red bottom is sailing on the ocean. The ship is equipped with several large yellow cranes. The deck is covered with numerous white rectangular cargo containers. The ship is moving from left to right, leaving a white wake in the blue water.

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

# 2015 UK food and drink export values by destination

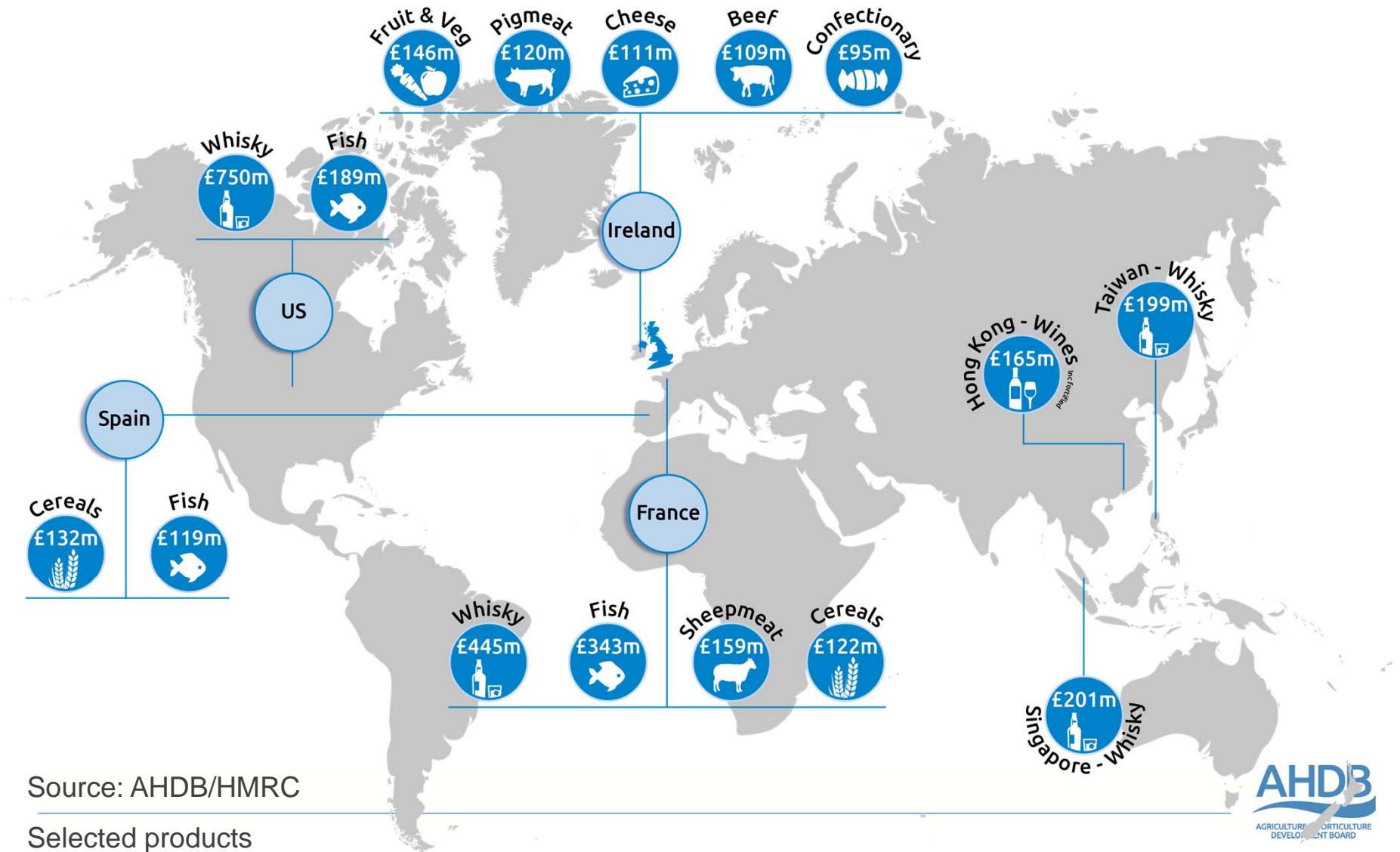


Source: AHDB/HMRC

Note: Includes alcohol

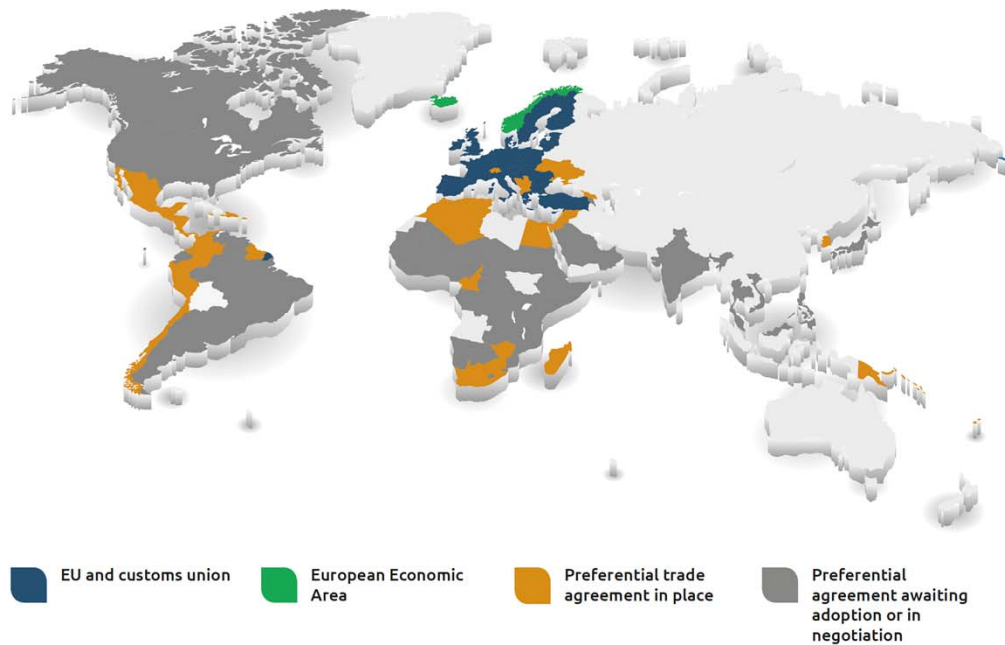


# UK exports – key products and markets



# Shifting trade deal dynamics?

The state of EU Trade, June 2016



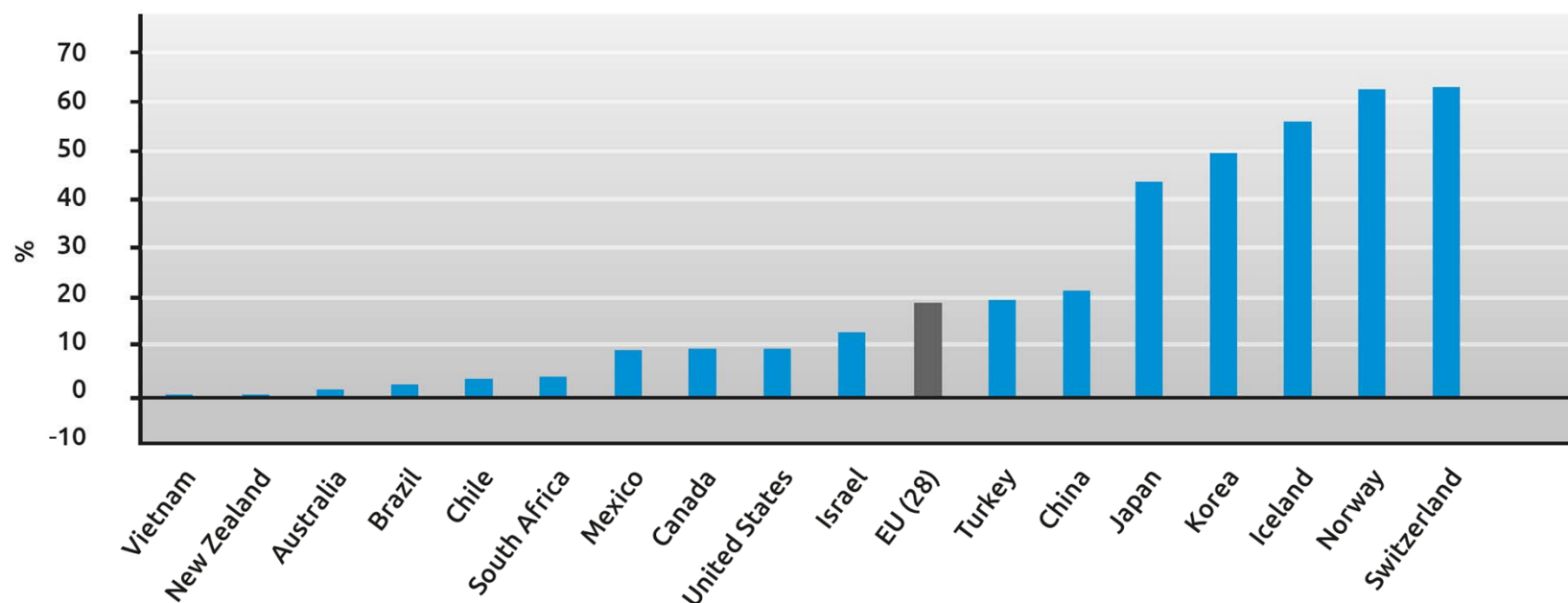




Agricultural  
policy models

# 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