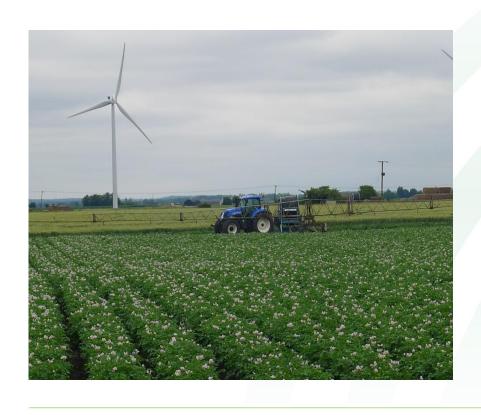
Drought impacts on agriculture & irrigation practices

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Sector overview



- Rain-fed crops
- Livestock & dairy
- Horticulture

Access to water





Rain-fed crops



- Variable yields
- Poor crop quality
- Increased fire risk
- Field edge bird & flower mixes





Livestock & dairy



- Reduced grass yields
- Reduced milk yields
- Forage shortage
- Low animal fertility
- Heat stress & disease





Fruit & vegetables



- High demand
- Increased production costs

Lower yields and quality





Access to water



- Low mains pressure
- Burst pipes
- Vulnerable private supplies





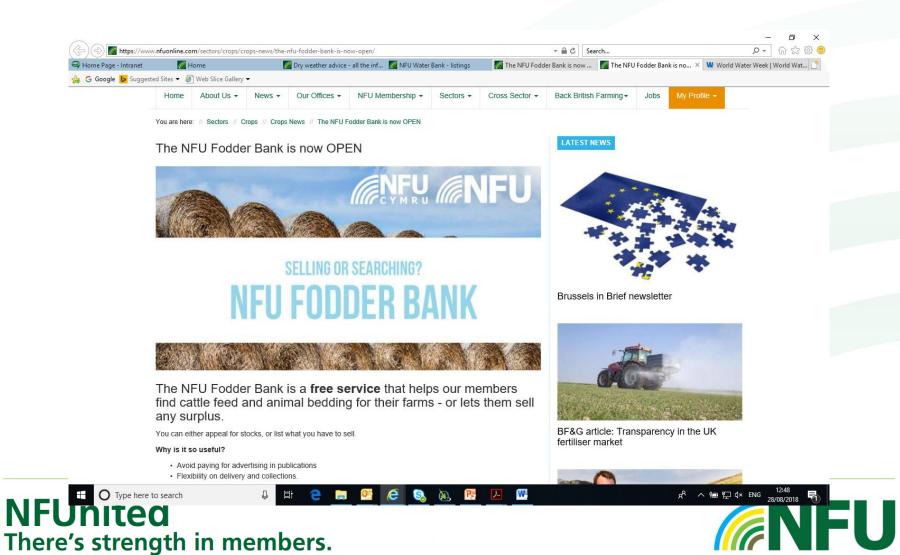
NFU 2018 drought survey

- 71% of farmers experienced negative drought impacts
- 69% of arable farmers said yields worse than expected
- 85% of livestock farmers said 2nd cut silage worse than expected
- 78% of livestock farmers experiencing fodder shortages
- 36% of livestock farmers facing bedding shortages

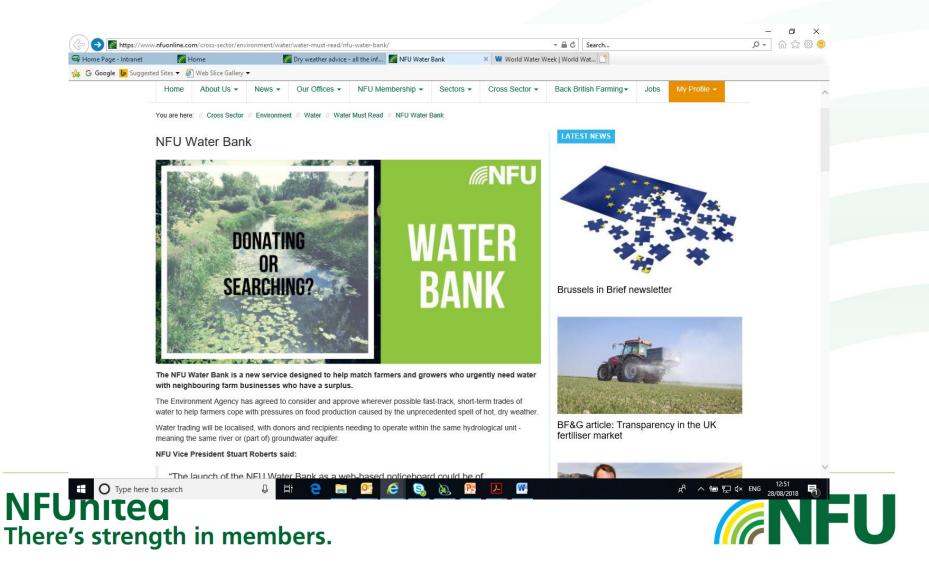




NFU Fodder Bank



NFU Water Bank



Drought impact on food prices?



July 2018 food price inflation 1.9%

- Food costs less than
 5 years ago
- Global dimension





Our policy asks Water for Food



PLAN

PROTECT

PAY





Looking ahead to 2019





