

Food Harvest | 2020

Milestones for Success 2013

2020

2013
Highlights

Employment

Tracking
Progress

Achievements

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Web Links

If you would like more information on the initiatives mentioned in this report, please explore: <http://www.agriculture.gov.ie/agri-foodindustry/foodharvest2020/>

SME Credit Facilities

<http://www.djei.ie/enterprise/smes/creditguarantee.htm>

<http://microfinanceireland.ie/>

www.enterprise-ireland.com/en/Invest-in-Emerging-Companies/Investors/Seed-Venture-Capital-Scheme

Competitiveness

http://www.teagasc.ie/advisory/better_farms/

www.enterprise-ireland.com/en/Productivity/Lean-Business-Offer/

Innovation

<http://www.bordbia.ie/industryservices/foresight4food/pages/foresight4foodinnovationprogramme.aspx>

<http://www.jemstone.ie/bordbia.html>

<http://www.bordbia.ie/eventsnews/events/IndustryAwards/Pages/default.aspx>

www.enterprise-ireland.com/en/Research-Innovation/Companies/R-D-Funding

Sustainability

<http://www.youtube.com/watch?v=JFETofdOkE8&feature=youtu.be>

www.BeGreen.ie

www.greenbusiness.ie

Entrepreneurship

<http://www.foodworksireland.ie/>

www.enterprise-ireland.com/en/funding-supports/company/HPSU-funding



Context

I am very pleased to introduce the 3rd annual progress report on the implementation of Food Harvest 2020. *Milestones 2013* has been prepared by my Department in collaboration with Enterprise Ireland, the Environmental Protection Agency, Bord Bia, Teagasc and Bord Iascaigh Mhara.

2013 has been an eventful year to date with the successful conclusion, during the Irish EU Presidency, of negotiations on a reformed CAP and CFP. This achievement is hugely significant as it will provide certainty and a sound policy environment for the development of the agri-food and fisheries sectors to 2020 and beyond.

I would like to take this opportunity to urge all of you, farmers, fishermen and agrifood business owners, to take time over the coming months to consider carefully how best to generate increased return from your business over the coming years. Now is the time to plan ahead and think about how you can introduce changes to improve the way in which you work.

Part of this planning process may well involve planning for succession and ensuring that you have made clear plans for the timely transfer of your family business to the next generation. I am delighted to see that many of you have already risen to the challenge of Food Harvest and have found new ways to work smartly and more collaboratively to maximise your profits.

This year in compiling *Milestones 2013* we have decided to recognise achievement and showcase just some of the many successful initiatives already underway. Some of these involve major investments in the agri-food sector and clearly demonstrate the increased sense of dynamism and renewed confidence that now prevails. Others involve acting green by reducing waste and improving the efficiency of resource use, both on farm and at processing level. Yet others clearly demonstrate the benefits of various forms of collaboration, such as successful examples of partnership formation at farm level and joint ventures and co-opetition at industry level. We also highlight some really good examples of innovation and new product development that we hope may serve to encourage and inspire others.

As usual in *Milestones 2013* we evaluate our progress against the ambitious targets set in Food Harvest 2020. I am delighted to report that the sector continues to make excellent progress and already we have achieved growth rates in excess of 25% (primary production), 20% (value-added) and 13% (exports) on the respective 33%, 40% and 42% growth targets to be achieved by 2020.

Finally, once again this year I must sound a note of caution. The recent experience of the fodder crisis has demonstrated that there is absolutely no room for complacency within the sector. Due consideration must be given to risk management. Expansion, whether at farm or processing level, must be carefully planned if it is to be successfully executed. The coming years will afford a unique opportunity for growth and expansion within the Irish agri-food sector and we must all continue to work together to maximise this opportunity.

Simon Coveney, TD
Minister for Agriculture, Food and the Marine.

Food Harvest 2020 - What has been Achieved

IMPROVED POLICY ENVIRONMENT

CAP Negotiations

The CAP agreement, delivered under the Irish presidency of the EU in June, was hugely significant and provides a sound policy framework for the sustainable development of the agriculture sector up to 2020 and beyond.

“A balanced package providing a very positive and modern framework for the ongoing development of the agriculture sector”

Key aspects of the reformed CAP are:

- A greater emphasis on sustainability through the “greening” of direct payments and the requirement for agri-environment measures in rural development programmes.
- New and enhanced support for young farmers in both “pillars” of the CAP.
- Greater market orientation allied to safety net provisions in case of severe market disturbance.
- Flexibility for Member States to adapt the policy measures to deal with specific challenges, including substantial discretion in how to redistribute direct payments between farmers.

These changes are consistent with the smart, green, growth objectives of Food Harvest and provide farmers and the agri-food sector with policy certainty to 2020.

Some key provisions are:

Direct Payments

- Single Farm Payments in Ireland averaging €1.214 billion per year.
- Up to 2% of national ceiling to be used for a mandatory young farmers’ scheme and up to 3% to be used for the National Reserve.
- Option of a flat rate or partial convergence (Irish model) model for MS in calculating redistribution of direct payments by 2019; (subject to a minimum payment of 60% of average payment per hectare).
- 30% of individual direct payment is contingent on compliance with 3 greening criteria: crop diversification, maintenance of permanent grassland and ecological focus areas.

Market Support

- Reference prices to be kept under review and opening of intervention to be discretionary.
- Intervention period for butter and skimmed milk powder to be extended by one month with an increased volume limit.
- Reduced funding provided for market measures but new and highly flexible provision is made for exceptional measures in cases of market disturbance, disease outbreaks or other specific problems

Rural Development

- Annual average EU funding of €313 million until 2020, subject to final agreement on EU Budget.
- Menu of measures includes support for agri-environment and climate, organic farming, Natura 2000, Water Framework Directive, farm and business development, quality schemes, afforestation and irrigation measures.
- Commencing in 2018, Areas of Natural Constraint with new biophysical criteria will replace current Less Favoured Areas.

Food Harvest 2020 - What has been Achieved

IMPROVED POLICY ENVIRONMENT

CFP Negotiations

In May, the Irish Presidency secured agreement for a new Common Fisheries Policy.

“This reform delivers sustainable fishing, a more transparent and competitive market and will optimise the potential of the fisheries sector and coastal communities”

Its main elements include

- Higher fish quotas that fully respect scientific advice for managing sustainable stock levels.
- Maintaining the "Hague Preferences" which protect and give additional quotas to Ireland.
- Prohibiting fish discards which will also assist the achievement of higher quotas.
- Developing a more responsive regionalised decision making process.
- A commitment to develop and strengthen biologically sensitive areas to afford additional protections for sensitive fishing grounds such as the "Irish Box".
- Retaining ownership of fish quotas as a public asset to protect family owned fishing vessels.-

Earlier in December, over 216, 000 tonnes of fish quotas were negotiated at the EU Fisheries Council for Irish fishermen for 2013. The direct value of the total package is estimated at around €213 million while the value to the overall economy will be significantly higher when the added value processing is included.

Of particular interest is the high quota of 56,666 tonnes achieved for boarfish and the 63 % increase in the blue whiting quota as significant technological developments are being made to maximise the added value from processing and marketing these species.



Food Harvest 2020 - What has been Achieved

INDUSTRY INVESTMENT

Strong industry support and buy-in for the Food Harvest 2020 targets and vision is critical to success. This is particularly relevant for the dairy sector, where significant investment in processing capacity and capability is required to capitalise on the increased milk supply which will follow the abolition of milk quotas in 2015. The Kerry and Glanbia investments, supported by Government through Enterprise Ireland, are testament to the confidence, drive and ambition of Irish food companies. These investments should act as a catalyst for other businesses and also assist clustering and follow on projects.

“These significant strategic investments send a strong signal to the global marketplace that Ireland is a very credible location for international business”.



Kerry Group PLC

The Kerry Group's decision to locate their Global Technology and Innovation Centre in Kildare is testimony to Ireland's capacity to deliver innovative, scientific and enterprise solutions for global businesses.

This €100m capital project is now underway with construction started and 200 people in place. A further 700 jobs will come on stream by 2016. The Centre will become Kerry's flagship R&D and competency centre and will handle global strategic functions for their Ingredients and Flavours and their Global Business Services.

It is the largest single investment in food innovation made in Ireland. It will act as a key focal point for Kerry customers, their key suppliers and food scientists and has the potential to attract other food and research investors.



Agri-Food Enterprises

Investments ranging from €0.1m to €3m in marketing and processing were completed with the support of the Department of Agriculture, Food and the Marine over the past year. The following are some examples of the projects aided :

Milne Foods Ltd installed a temperature controlled storage and handling facility to improve the shelf life of their horticultural produce.

M&K Meats Ltd invested in new machinery and fit-out enabling the company to expand business including export markets.

Boyne Valley Meats Ltd ocompleted investment in capital equipment, boning, chilling and storage facilities to add value to products and generate employment.

In addition, 175 applicants from the commercial horticulture sector were approved for funding of €4.46 million. This funding is expected to generate up to €11 million in matching industry investment.



Glanbia Ingredients Ireland Ltd

Glanbia, a leading dairy processor, exports its range of dairy products, ingredients and proteins (infant formula, clinical and sports nutrition) to over 50 countries.

It has committed itself to a €150m major capital investment for the development of the largest dedicated dairy powder facility in Ireland. Work on this key infrastructural facility has started. It is expected to be completed in Spring 2015, in good time for the envisaged 50% increase in milk production levels.

This investment will generate employment for 450 people during its construction with a further 76 employed directly at the plant. As the dairy industry purchases 90% of its inputs from the domestic economy, this project is expected to deliver up to 1,600 jobs in the wider economy in on-farm, suppliers, transport and other service providers.

Food Harvest 2020 - What has been Achieved

IMPROVING SME CREDIT FACILITIES

Indigenous enterprises are essential for the survival of local communities. A consistent and strong flow of credit underpins the continuing development and growth of small, medium and micro enterprises, which are the lifeblood of rural areas. It is recognised that SME's in the agri-food sector can face disadvantages in obtaining credit due to low returns and weak intellectual property rights. On the other hand, there is a growing realisation that enhanced dividends accrue to local economies from the provision of credit and investment support to agri-food enterprises. The comparatively high multiplier effect provides a significant additional financial return which is spent locally. The Government has made a particular effort to ensure that the range of credit facilities from the public and private sector matches the demand from this sector and where necessary has taken specific action to deal with market failure.

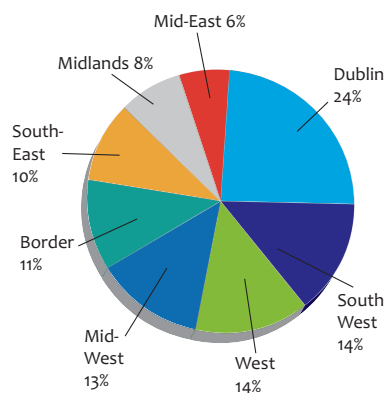
State Credit Supports



Microfinance Ireland operates the Micro-Enterprise Loan Fund which was launched last year. This is a State initiative providing small (€2-25,000) unsecured loans to viable businesses that have been declined credit facilities by their bank; see microfinanceireland.ie.

In their first 9 months of operation, loans of €1.26m have helped support 216 jobs in 90 microenterprises. The primary sector has benefited, with loans provided for on-farm projects, fishing, farm diversification, food development, market gardening, manufacturing and distribution. As can be seen from the chart following it has already achieved a wide geographic spread. This flexible scheme fills a gap in the credit market and is expected to lead to an additional 7,700 jobs over the next 10 years. MicroFinance Ireland works closely with the newly established Local Enterprise Offices (LEOs) which provide the 'first-stop-shop' information, advice and mentoring support structure for local enterprises.

Activity by Region



Credit Guarantee Scheme

Another market failure affecting the development of SMEs arises where viable SMEs are refused credit by their banks due to perceived high risk or insufficient collateral. This issue is addressed by the Credit Guarantee Scheme where, for a fee, the State guarantees 70% of the credit facility advanced to industrial SMEs by participating banks. Primary agriculture is excluded but downstream processing is eligible.

Seed & Venture Capital Scheme 2013 – 2018.

To increase the availability of risk capital for SMEs, the Government, through Enterprise Ireland, is making €175 million available to leverage up to €700 million in private sector venture capital funds. Applications under the first investment call, worth €100 million, closed at end July, and are currently being assessed. These commercially focused venture capital funds will invest in high-growth innovative Irish companies in the fast-growing technology and life sciences sectors.

Commercial Credit Supports



Bank of Ireland



The main commercial banks and the European Investment Bank are a further source of funding for SMEs.

The AIB's €250 million Agri Investment Programme provides support for on-farm capital investment, working capital and asset finance. Earlier this year, it provided a further €50 million support package to allow the sector deal with the fodder crises.

Bank of Ireland recognises that currently the agriculture sector has the strongest demand within their SME loan book. In 2012, €476m approvals were made from their agri-investment fund with over 85% of all agri-working capital applications approved.

Over the last five years, the European Investment Bank (EIB) has provided more than €3 billion for infrastructure investment and small businesses in Ireland.

Earlier this year, EIB provided a €200m low cost stimulus package to help Irish small businesses create jobs and stimulate economic growth. Based on previous experience, average loans per company would be around €90,000, with the main beneficiaries being agriculture, trade, health and manufacturing enterprises.

This programme complements their €80m Risk Sharing Instrument initiative launched last November to provide loans of up to €7.5 million to SMEs and mid-size companies undertaking R & D or innovation.



Food Harvest 2020 - What has been Achieved

IMPROVED COMPETITIVENESS

Competitiveness is one measure of a business's ability to succeed in the market place and is critical for open, export orientated economies such as ours. While companies have minimal influence over global conditions, many factors such as product mix, costs, productivity, skills, etc. are within their own control. Using these elements to maintain competitive advantage is paramount and integral to the success of Food Harvest 2020.

There are a range of State-led measures targeted at improving competitiveness. The commercial outcomes which have resulted from initiatives such as Enterprise Ireland's Lean Business offer and the Teagasc / Irish Farmers Journal BETTER Beef Farms, demonstrate their capability for increasing company performance and individual capability.

LEAN Achievements

Enterprise Ireland has a three-level Lean offer. **LeanStart** to help SMEs get started on the lean journey, **LeanPlus** to implement lean processes and principles in the company and **Lean Transform**, geared to making transformational change in the culture of the organisation.

To date, Enterprise Ireland's Lean offer has been availed of by over 140 companies. At the SME end, savings of circa €12m p.a. are being achieved with savings of the order of €200,000 being reported for larger companies which are more advanced on the Lean journey.

Dawn Meats

Gained a 50% increase in burger output from modernising equipment and enhancing human capability

"The programme challenged traditional management practices and culture while delivering impressive business results"

Slaney Foods

Significant improvement in boning hall productivity, yielding savings in excess of €0.5 million

Dew Valley

Uptime of processing line increased by 4%.
Returns from LEAN were over 15 times investment made.

Hilton Foods

Maintained bottom line in a very difficult period by enabling supervisors deal with issues on 12 production lines

"LEAN works on an ongoing basis. We refer to it as "structured common sense"

Callan Bacon

25% increase in primary and secondary processing capacity, achieved annual operating cost savings of more than € 360,000

"Involving people in teamwork has been key to success and contributed to identifying talented people for the future".

Food Harvest 2020 - What has been Achieved

Improved Competitiveness

The BETTER Farm Programmes are run by Teagasc in joint partnership with industry partners in dairy, beef, sheep, and tillage. These aim to improve farm productivity using a three-tiered knowledge transfer approach. Research findings are initially applied under controlled situations, evaluated on well managed commercial farms for practicality, efficiency and profitability, and only then are results published and demonstrated at farm walks, discussion groups and through the advisory service.

To disseminate the lessons learnt from the Better Farm Programme on a much wider scale, the Department of Agriculture, Food and the Marine rolled out new technology adoption programmes in the beef, sheep and dairy sectors. These have stimulated a dramatic growth in the number of farmers developing professional business plans and participating in discussion groups.

BETTER Beef Farm Programme Achievements

The joint Teagasc / Irish Farmers Journal BETTER Farm Beef Programme is also supported by industry sponsors ABP, KEPAK, FBD and Dawn Meats and is now nationwide having grown from 12 to 37 farms.

Between 2008 and 2012, the beef farms involved in phase 1 of the programme increased their stocking rate from 1.85 LU to 2.03 LU/ha, achieved tighter calving intervals of 12-14 weeks and an improved live weight gain of 24%. The overall impact is an improved gross margin of 118% from €386/ha to €843/ha. giving an improved margin of over €18,000 on a 40 hectare farm.

Challenge

Marty Lenehan who ran a suckler cow herd of 59 animals on a fragmented, leased 60 hectare farm, simply wanted to improve farm profitability and achieve a viable farm income.

Action

With his Teagasc advisor, Marty drew up a detailed farm plan to improve his stocking rate, grassland management and calving spread. Over the three-year programme, he worked on maximising his output through increasing his stocking rate and enhancing breeding and weight performance.

Outcome

The transformation in grassland management over the three years was key to driving animal performance and controlling costs. His herd size has risen from 59 to 90; the calving spread has been tightened ; while animal liveweight has increased from 332kgLw/Ha to 605kgLw/Ha. There have been increased costs (€521 to €687/ha), but his gross margin has also increased by €369/ha.

Food Harvest 2020 - What has been Achieved

SUSTAINABILITY

As a global food producer and exporter, Ireland needs to be well placed on the sustainability curve at both primary and processing level. Companies are aware of this and also recognise that sustainable operations can increase efficiency, afford competitive advantage and improve market penetration. Maximising these benefits was central to the 'Green' message in Food Harvest 2020. The Bord Bia **Origin Green** and the EPA **Green Business** are two cost effective sustainability enhancing programmes which demonstrate 'win-win' outcomes.

Origin Green

Origin Green provides verifiable and independently audited evidence of sustainability claims, delivers efficiencies and offers a point of differentiation in a competitive marketplace.

Challenge

In 2010, Food Harvest 2020 mandated Bord Bia to develop a coherent, environmental message with market potential.

Action

The journey involved interaction with industry leaders, international research and also face-to-face and online testing of propositions with consumers, trade and markets.

Origin Green concept was developed, piloted with 9 companies and launched to industry and international trade partners.

Impact

By end 2014, **Origin Green** aims to have 75% of exports supplied by companies verified to Origin Green standards.

One year from inception, OG has taken root. 260 companies have registered their intent, 60 have submitted plans and 22 (accounting for 50% of exports) are full members and are being independently audited.



A selection of Origin Green Targets as set by members

- | | | | |
|------------------|--|---------------------|---|
| Energy | <ul style="list-style-type: none">20% reduction in energy by 2015Anaerobic digester by 2016 | Biodiversity | <ul style="list-style-type: none">Implement a biodiversity register and a species enhancement programme by 2015 |
| Emissions | <ul style="list-style-type: none">12% reduction over next three years30% reduction by 2020 | Welfare | <ul style="list-style-type: none">Provide an advice and feedback programme to farmer suppliers on welfare initiatives |
| Waste | <ul style="list-style-type: none">Zero waste to landfill by 201570% reduction in waste to landfill due to increased recycling | Social | <ul style="list-style-type: none">Reduce salt content of products by 15% by end of 2013Removal of artificial colouringsDevelop and implement Health & Nutrition Policy from 2013. |
| Rainwater | <ul style="list-style-type: none">20% reduction by 2015Implementation of rainwater harvesting programme by 2014 | | |



<http://www.youtube.com/watch?v=JFETofdOkE8&feature=youtu.be>

Food Harvest 2020 - What has been Achieved

SUSTAINABILITY

GREEN BUSINESS = € INCREASED PROFITS

Challenge

The Environmental Protection Agency's objective was to develop and roll out a programme which would help SMEs, the public sector and voluntary organisations become more resource efficient.

Action

Using international best practice and their own experience, the EPA developed, piloted and tested the **Green Business** programme. This initiative focused on practical self-help web tools, guidance manuals and site visits to effect real business savings using less energy, water and raw materials.

Impact

To date, **Green Business** has engaged with over 500 businesses and visited 155 of them. These site visits have identified opportunities of €10 million in cost savings for participant enterprises with an average potential saving of the order of €65,000 per company visited.

Dawn Meats

Achieved a 34% savings on water consumption, saved €25,000 on oil consumption through water reuse and saved 85 truck journeys through packaging redesign.

Wexford Creamery

Without incurring additional investment, achieved a 5% reduction on water, a 4% fall in energy levels and increased recovery of up to 2,000 tonnes of product per annum.

Mayo General Hospital

A Green Healthcare case study shows that this hospital reduced its food waste by 0.34kg per bed day, its landfill waste by 75% and the level of food uneaten to 25% compared to the average of 49%.

Jack Cuthbert Bakery

Cost savings of over €47,000 achieved through energy reduction, waste minimisation and water conservation.

Lakeland Diaries

Reduced its energy, water and waste usage to achieve savings of 0.25 % of its annual turnover. It now reuses or recycles the majority of its wastes

Freshways

Reduced its water usage by 750m³ and food waste by 112 tonnes per annum. Achieved annual cost saving is €30,000 and payback on its investment within two months

Food Harvest 2020 - What has been Achieved

COLLABORATIVE WORKING

Small scale and poor structures are factors which hinder progress right along the Irish food chain. Productivity and competitiveness are constrained by farm size, access to land and an ageing farming population while the ability of Irish food and drink companies to compete effectively in global markets is hampered by their relatively small scale.

At both primary and processing level there is an increasing realisation that collaborative working and strategic engagement can successfully reduce overheads, achieve scale and introduce new knowledge and expertise to the venture. This type of strategic cooperation takes many forms including farm partnerships, joint ventures and co-opetition.

"Planning, planning, planning, is the key I think and I would like to think that we get more right than we get wrong"

"You have to work to build up trust. There's going to be disagreements. There would be something wrong if there wasn't. You have to work around them and see if you can solve the problem"

Farm Partnership

Farm Partnerships, where two or more farmers join resources and efforts for mutual benefit, are one way of improving farm scale and structure.

Challenge

Alf McGlew and Andrew Purcell, two neighbouring Louth farmers, wanted to expand their dairy herds with minimum risk, outlay and personal stress.

Action

They started with a period of neighbourly co-operation during which they found they worked well together. This was followed by the more formal farm partnership option. With the help of Teagasc, partnership agreements were drawn up and a joint business plan agreed.

Impact

Six years into the partnership, the herd size has increased from 140 to 280 cows, additional land has been leased, extra housing has been built and their farming system has changed to spring milking. Their collaborative style of management has improved output and provided increased income for both families.

"One of the main benefits is family life, you go away and you just don't think about the farm. Being together has helped to increase profits and we are making as much or more money now than we were"

"Sure there are extra costs involved in the first couple of years, but once these are in place you stand to reap the rewards"



Food Harvest 2020 - What has been Achieved

COLLABORATIVE WORKING

Co-opetition

Co-opetition is a business strategy where firms compete in some areas but co-operate in others for mutual benefit. In the case of Jade Ireland Seafood and the Waterford Blaa Bakers Association this type of collaboration facilitated business expansion.

Challenge

To establish Irish seafood as the leading premium seafood product in the Shanghai, Dailian and Qingdao regions of China.



Jade Ireland

Action

With assistance from the Bord Bia Fellowship Programme and BIM, 4 successful Irish seafood companies came together in 2012 to establish a new business for the Chinese market. Jade Ireland Seafood Ltd is the marketing wing of McBride Fishing Ltd, Sofrimar Ltd, Carr shellfish Ireland Ltd and Shellfish De La Mer Ltd. This company has developed a new range of branded products to serve the foodservice and retail markets in China and, in line with their 3-5 year strategy, has established market entries in both these areas.

Impact

The Ocean Jade brand has been established as a premium product. Sales have increased for the first half of 2013 over the same period last year and the company has launched the full range of its products with Spar China to supply its retail stores nationwide in China.

Challenge

To register Waterford Blaa / Blaa as a Protected Geographical Indication (PGI) to protect and market this unique product.



Waterford Blaa

Action

The four bakeries producing Waterford Blaa joined together to form the Waterford Blaa Bakers Association. They recognised that a common approach could improve product awareness and business (up to 10,000 Blaas are baked daily), while remaining true to each producers' unique style and area.

Impact

With the assistance of a mentor, Bord Bia and DAFM, the Waterford Blaa Bakers Association successfully navigated the national and EU registration process. Waterford Blaa is now a recognised symbol of the area and is used to promote events held in Waterford/South Kilkenny e.g. Fleadh Blaa at the Munster Fleadh in 2012. Pilot sales have been made to delicatessens as far away as Paris and the producers have plans to expand.

Food Harvest 2020 - What has been Achieved

COLLABORATIVE WORKING

Joint Ventures

Joint ventures such as the ones between Breizon, an Irish seafood company and two French companies and the Farmers to Market initiative allow parties to pool their expertise and improve structure while minimising risk.

Challenge

To supply Irish seafood to restaurants in northern France from the port of Lorient.



Breizon

Action

A joint Irish-French venture company was set up in 2012 bringing together a long established Irish company and two French partners. Their combined expertise linked experience of supplying live and processed seafood with market access and specialist knowledge of retailers and restaurateurs at the premium end of the French market.

Impact

The facility at Lorient is fitted with live storage tanks for lobster and other molluscan shellfish and during the first year of business these facilities have been enlarged to meet demand. The product range has been extended and sales of €1 million have been achieved.

Challenge

Chicken producers in the Cavan/Monaghan area wanted to improve recognition of their produce and their unique growing facilities so as to achieve increased returns.



Farmers to Market

Action

12 free range chicken producers, working with Bord Bia and Cartons, came together to develop a new brand and marketing campaign for their chickens. Their aspirations were to deliver better returns for their family farms by marketing the distinctive quality and taste of their chickens, enhancing the reputation of their product and improving direct customer contact.

Impact

The **Farmers to Market** brand has been developed and publicised at the National Ploughing Championship and Bloom. Over the past two years of operation, the number of their free range chickens sold has increased with improved returns.

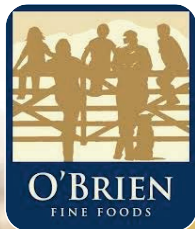
Food Harvest 2020 - What has been Achieved

INNOVATION

Innovation is key to productivity and growth and is also critical to recovery in the global economy. Optimal innovative solutions involve a combination of what consumers want, what is technically possible and what is commercially viable. Best results are achieved when the full palette of innovative solutions is explored. These can range from something as relatively simple as modified labelling through the more complex transformation of existing products involving their reformulation or modification, to more extensive research and development resulting in new products, patents and intellectual property rights.

Challenge

To respond to consumer demand by developing an extended product range with improved dietary properties.



"An innovation only becomes an innovation when it delivers a benefit to the market"

O'Brien Fine Foods

Action

The main scope of the project was to lower fat and salt levels, achieve an enhanced ingredient content while maintain their award winning status as a premium offering.

Outcome

The company has launched new Own Label and branded product ranges with reduced fat and salt content and free from HVP, phosphates, artificial flavourings and colourings. These new products account for 30% of turnover while their innovative nature and health benefits have helped to secure new business with the main multiples. The company has already increased its employment levels by over 70 and anticipates further expansion.

Challenge

Development of new desserts with extended shelf life to access more distant markets .



Lily O'Brien Chocolates

Action

Supported by Enterprise Ireland, the company undertook a formal R & D programme to develop new recipes, tastes and processes as well as solving the shelf life, packaging and distribution issues.

Outcome

A new range of dairy desserts based on its existing chocolate centres was developed. They are being sold as premium products to airlines and foodservice providers and have been awarded a Gold Great Taste Award. Desserts are now a growing element of overall business.

Food Harvest 2020 - What has been Achieved

INNOVATION

Challenge

Develop a manufacturing process to produce low fat nutritious food.



Teagasc

Action

Teagasc researchers developed an energy-efficient method to produce novel, protein-based, calcium-enriched fat replacers. The high-quality low-fat replacers produced with this technology have added health benefits as they are naturally enriched with absorbable calcium and soluble dietary fibre. In addition, the energy-efficient method enhances cost effectiveness for companies.

Outcome

Teagasc has filed a patent and is currently seeking a commercial partner to market and licence the technology.

Challenge

Develop a new innovative range of seafood ready meals, with a strong brand identity, using salmon, whitefish and sea vegetables from locally sourced raw material.



Kinsale Gourmet

Action

The company used the BIM Seafood Development Centre to develop and trial their product. The SDC provided assistance on trials, sensory research, market assessment, price points and pack sizes.

Outcome

The company has launched three gourmet products which are healthy and time efficient. They have secured contracts with major multiple stores in Ireland and the UK, including an online retailer for their frozen range. This business growth has resulted in the creation of eight jobs.

Food Harvest 2020 - What has been Achieved

Challenge

Maximise the potential of 40,000 tonnes of blue whiting by developing product for human consumption rather than fishmeal production. Also, to develop African and high value Asian markets.



Ward Fish

Action

Over a two year period, Ward Fish, supported by BIM in a €6 million investment programme, invested in technology to process blue whiting in round frozen form and in added-value product options. By linking with the SDC, further high value options in canning and use of by-products evolved.

Outcome

Overall exports of blue whiting rose from €12 million to €43 million and Ward Fish has already achieved double digit sales growth. New blue whiting markets were secured in Africa with value added opportunities in Asia being developed.

Challenge

To utilise the by-products of food processing (in particular fruit juice and beer) as novel, nutritious ingredients.



FIRM Research

Action

This DAFM funded research allowed Teagasc and industry analyse the processing by-products from fruit juice (pomace) and beer (spent grain) to assess their reuse as novel ingredients. Based on this research and test results, a range of baked products (breads, scones, breadsticks, gluten-free breads) and puffed/extruded formulations were developed with enhanced sensory properties, dietary fibre and bioactive properties.

Outcome

Teagasc is currently planning scale up trials with commercial companies.

Challenge

Develop high quality, low glycaemic breads.



Action

Researchers at Teagasc and UCC analysed a range of low GI grains, fibres and flours to assess their ability to reduce GI when used in bread formulations. They evaluated how the materials behaved during baking and carried out shelf-life and sensory tests on the bread with satisfactory taste and sensory results.

Outcome

A number of commercial companies are in the process of utilising these findings in developing low GI breads and beverages. Some innovations from this project have already been adopted by industry.

Food Harvest 2020 - What has been Achieved

ENTREPRENEURSHIP

Food Harvest 2020 highlighted the importance of developing and nurturing a culture of entrepreneurship in building a successful indigenous food industry. Recognising the scarcity of High Potential Start-Up (HPSU) companies in the sector and the specific challenges facing food start-up companies, in terms of intellectual property and low returns, a new inter-agency programme 'Food Works' was developed to target and accelerate the development of a new generation of HPSU food companies.

The Food Works ecosystem combined the expertise of Bord Bia, Enterprise Ireland and Teagasc in business development, market demand, production technologies and research. Successful participants were given an invaluable range of practical business supports, finance and mentoring to help them develop their initial concept into a winning food product with international appeal. In its first year of operation, 11 companies came through the programme and are progressing up the investment pipeline. Of these, Elivar and IASC are the most advanced and between them these two companies have the potential to generate 20 new jobs over the next 3 years.

*"In essence, **Food Works**, fast tracks your food business idea, opens doors and allows you focus on your idea"*

"Allows you to get invaluable feedback from potential customers which in a start-up situation will often be difficult to glean"

"The level of industry access, educational support and quality of mentoring has definitely made us stronger and will help us succeed"

Elivar

"Our bodies change so should our sports nutrition"

Challenge

To identify and develop a range of sports nutrition supplements targeted at middle aged (35-55) endurance athletes.



PREPARE



ENDURE



RECOVER

Action

Under Food Works, the company spent 12 months researching and validating the business opportunity. Their market and consumer research in the UK, identified MAMILs or older males as an attractive market. Unique formulations were developed by the Elivar team to suit the physiology of the older endurance athlete to allow them to compete and recover faster without any long term muscle damage.

Outcome

ELIVAR developed a successful business plan which has received HPSU support. They plan a Summer launch of products in the UK, their target market.

Food Harvest 2020 - What has been Achieved

ENTREPRENEURSHIP

Challenge

To convert excess Irish mussel meat into exportable value add products.



IASC

Action

IASC has a strong focus on new product development. It worked closely with Teagasc and BIM on developing a high value mussel butter for use in both the manufacturing and foodservice sectors. It is also developing a second product for launch later this year.

Outcome

IASC has developed a premium range of intensified seafood flavoured butters targeting the foodservice and retail sectors. It has received HPSU support, secured listings with foodservice operators and will launch its product initially in Ireland, followed by the UK.

Entrepreneurship is seen as a powerful driver of economic growth and job creation. In addition to FoodWorks, which is targeted at HPSU food entrepreneurs, there are a range of other state programmes which support and develop entrepreneurship. These include the Local Enterprise Offices (LEOs) which are designed to assist start-ups and micro-businesses, Leader programmes to support rural enterprise, Teagasc's technological support service for SMEs, Bord Bia's Vantage service and Enterprise Ireland's New Frontiers Entrepreneur Development Programme run in conjunction with the third level institutes. AnaBio Technology is an example of a successful entrepreneur who availed of a variety of supports to commercialise a targeted research outcome.

AnaBio Technologies

Challenge

To develop, produce and market a new micro-encapsulation product which delivers targeted and controlled health giving components.



Action

Sinead Doherty, a Teagasc Walsh Fellow, conducted research over a two year period at Teagasc and UCC on the development of a capsule type product to improve on the longevity and reliability of existing products. Using Teagasc Moorepark as a working base, laboratory and pre-clinical tests were undertaken to discover which elements delivered best results. Trials were conducted to establish its efficacy at shielding the ingredient and delivering it where required.

Outcome

The end result was a stable encapsulation product with a sensitive micro-environment which gave an improved shelf life and controlled delivery facility. With the assistance of Enterprise Ireland, the original product was patented and the technology has evolved to accommodate ingredients such as probiotics, bioactives, nutraceuticals, vaccines and sports supplements. In 2012, AnaBio Technologies was officially launched and an impressive client portfolio, including multinationals, has been established.

Food Harvest 2020 - What has been Achieved

2013 HIGHLIGHTS

Employment

- Forfas's annual employment survey indicates that the number of full-time jobs in the food and drink sector increased by 1,323 in 2012. Overall, national employment figures have risen by 33,800 (CSO Q2.2013) in the past year contributing to the reduction in unemployment from 15% to 13.7%
- In addition, research projects funded by the Department will create up to 75 post-doctorate contract research positions over the period 2013 to 2017. These employment figures will be augmented when the 2013 awards under the current DAFM call are announced.

Trade

- Bord Bia estimate that exports increased by 8.6%, or €370 million, from January to June 2013.
- Over the past year, in excess of €181 million has been invested in projects in the drinks sector including the Enterprise Ireland supported expansion of the Middleton distillery, a new brewery at St. James Gate and expanded tourist facilities.
- The work of the Department's Meat Market Access Unit and the cross-divisional Trade Team have, over the past year, achieved access to 15 new market areas. This work was significantly supported by co-ordinated diplomatic efforts and Ireland's high animal and food safety standards.
- Bord Bia Marketing Fellows have contributed to additional export sales in excess of €30 million in the past 3 years.
- Annual business to the value of €31.8m was generated from Marketplace 2012 with significant new buyer relationships fostered.

- Using the co-opetition model, Bord Bia facilitated Dairygold and six farmhouse cheesemakers to enter the German premium market. Dairygold Germany lists six farmhouse cheeses (Cooleeney, Cashel Blue, Cahills, Carrigbyrne, Ardahan, Carrigaline) under the 'Irish Land' brand. Their goal for the next three years is to establish Ireland as a supplier of specialist premium cheese while building 'Irish Land' as the preferred brand for Irish cheeses.

- A successful Trade Mission was undertaken to Switzerland in July to expand investment relationships with key Swiss-based players. In October, Minister Coveney will lead a diverse Trade Mission to the Gulf States involving companies in the dairy, meat, seafood, equine and agri services. The visit will combine political engagement with industry related events and meetings with the Irish Diaspora and the business community in the region.

- An Africa Agri-Food Development Fund was launched to support the African local food industry and also to foster mutual trade between Ireland and Africa.

- Following evaluation of a proposal submitted by Bord Bia on behalf of the Irish and UK mushroom industry, the EU Commission decided in 2013 to award 50% funding for a €2.7m three year mushroom programme.

Budgetary Incentives

- Budget 2013 introduced a new relief on capital gains tax for agricultural land transactions leading to efficient farm restructuring. The relief is available for farmers to improve the viability of their farm holding by selling an outlying parcel of land and purchasing one closer to

their remaining holding. Detailed guidelines, developed by DAFM in conjunction with Teagasc, were published in July 2013, see link

<http://www.agriculture.gov.ie/media/migration/formsdownloads/CGTGuidelines020713.pdf>

- Other key reliefs expanded in Budget 2013 include:

- The expansion of the foreign earnings deduction scheme from the BRICS counties to 8 new African countries,
- The extension for a further 3-year period until end of 2015 of,
 - general 25% rate of stock relief on income tax for all farmers,
 - 100% stock relief for certain young trained farmers and
 - 100% stamp duty relief for land transfers to certain young trained farmers.

Farm Efficiency Programmes

- An independent assessment of the outcomes from the Dairy Efficiency Programme shows that members are 20% more likely to adopt new technologies, improve their management practices and accrue higher gross margins. For a 40 hectare dairy farmer, this is worth, on average, up to €10,000. Similar results are expected from the 13,000 farmers participating in the Beef Technology Adoption Programme (BTAP) and the newly initiated Sheep Technology Adaption Programme (STAP).

Food Harvest 2020 - What has been Achieved

2013 HIGHLIGHTS

- Phase 1 of the Teagasc / Irish Farmers Journal BETTER farm beef programme achieved a 49% increase in gross output on the beef farms involved. Phase 2 of this knowledge transfer programme has been rolled out nationally with the number of farms increased to 37 beef, 9 sheep and 2 tillage.

Farm Partnerships

- Awareness raising measures combined with financial benefits have resulted in an increased take-up of farm partnerships over the past two years. There are currently 648 registered farm partnerships with 125 of these registered since January 2012. Budget 2013 included a measure to extend the definition of a registered farm partnership beyond dairy enterprises to allow other farmers benefit from financial advantages, such as 50% stock relief, as well as the enhanced managerial, social and succession benefits resulting from farm partnerships.

Environmental Measures

- The report on the outcome of Phase 1 of the Agriculture Catchment Programme provided broadly positive indications for water quality. This programme is a longitudinal scientific study monitoring nitrogen and phosphorus in 6 catchment areas which include intensive dairy farms. Phase 2, has started, as it takes between 5-20 years to effect changes in water quality following implementation of mitigation measures.

- An independent environmental analysis is underway on the various scenarios related to the implementation of the Food Harvest 2020 report. A draft report has been prepared by consultants which will form the basis of an 8-week public consultation process to be initiated shortly.

Research and Innovation

- Since the establishment of the Irish Dairy Board -Teagasc initiative on new cheese development, 300 different cheese variants have been produced with three new varieties scheduled for market launch. The first, produced in a new facility in the Middle East, will be launched in Q4 2013. A second cheese will be launched by an Irish company in Q4 2013 and a further new variety will be launched in 2014.

- Following a positive review of Phase 1, the second phase of Food for Health Ireland is now underway focussed on further mining and commercialisation of dairy functional ingredients.

- The last year has seen significant engagement between the key dairy companies and Enterprise Ireland in defining the common research priorities and technological needs of the sector. These have now been agreed in detail and a call for proposals to implement a new Dairy Technology Centre is imminent - with an open day for the research community scheduled for early September.

- As with dairy, the key players in the meat industry have engaged with each other and with Enterprise Ireland over the last year to establish their common research priorities. Good progress has been made in scoping a new industry led Meat Technology Centre.

- Bord Bia completed 37 insight and innovation projects and launched its Branding, Insights and Innovation Workbook series.

- DAFM is championing the implementation of the Action Plans for “Sustainable Food Production & Processing” & “Food for Health”, two of the priority areas under the National Research Prioritisation Exercise (NRPE). A set of metrics developed by the Prioritisation Action Group (PAG) to monitor the impact of State investment under these and all other NRPE Action Plans was adopted by Government.

- In early 2013, a new research call was launched by DAFM closely aligned to all food relevant NRPE priority areas.

Animal Health and Quality

- Ireland achieved Aujeszky disease free status, retained its Brucellosis free standing, reduced the number of Bovine Tuberculosis reactors and Animal Health Ireland implemented a compulsory BVD programme.

- Genomic selection is now the genetic method of choice for dairy cattle. Use of genetically selected bulls by Irish farmers has increased from 34% to 54% and there has been a 46% increase in genetic gain since its introduction. Ireland is expected to have one of the most fertile Holstein-Friesian herds by 2020 and this will be assisted by the use of a newly developed DNA chip and the Moorepark Next Generation Herd.

TRACKING FUTURE PROGRESS

Assessment of FH2020 Targets and Recommendations

Overview of FH2020 Recommendations

Delivery of Food Harvest 2020 is underpinned by the action taken on the 215 recommendations contained in the report. The link attached gives fuller details of the progress achieved to date:

<http://www.agriculture.gov.ie/media/migration/publications/2013/FH2020June2013260813.pdf>

A summary assessment of the overall progress achieved on these wide ranging actions is illustrated in Figure 1 across. This shows that substantial action has been taken on 55% of the recommendations, with a further 37% being progressed.

FH2020 Growth Targets

Food Harvest 2020 report set out 3 main targets to be achieved by 2020

- a 33% increase in the value of primary agriculture by increasing its value from €4.596 billion to €6.275 billion,
- an export target of €12 billion from the 2007-2009 baseline figure of €8.2 billion,
- a 40% increase in value-added from the estimated 2008 baseline.

Figure 2, across, charts the trend for these three parameters. The value of primary agriculture, exports and value added shows a positive upward trend. Latest CSO figures indicate increases of 25%, 13% and 20% respectively on the above Food Harvest baseline figures.

Key Actions in Milestones 2012

Part of the success of Food Harvest has been the continuous monitoring, tracking and assessment of progress by the High Level Implementation Committee, chaired by Minister Coveney. This involves monitoring the 2020 growth targets and assessing the 2013 and 2015 benchmarks, for any blockages which need to be resolved. In addition, the HLIC has set itself shorter term key actions to be achieved annually by end June. These are linked to the wider Government 2013 Action Plan for Jobs and the link below shows the substantive progress which has been achieved on these 59 key actions as well as on the 31 DAFM related actions in the 2013 Action Plan for Jobs.

<http://www.agriculture.gov.ie/media/migration/publications/2013/Milestones20124thQtrProgressReportFinal260813.pdf>

Figure 1: Summary Progress on FH 2020 Recommendations

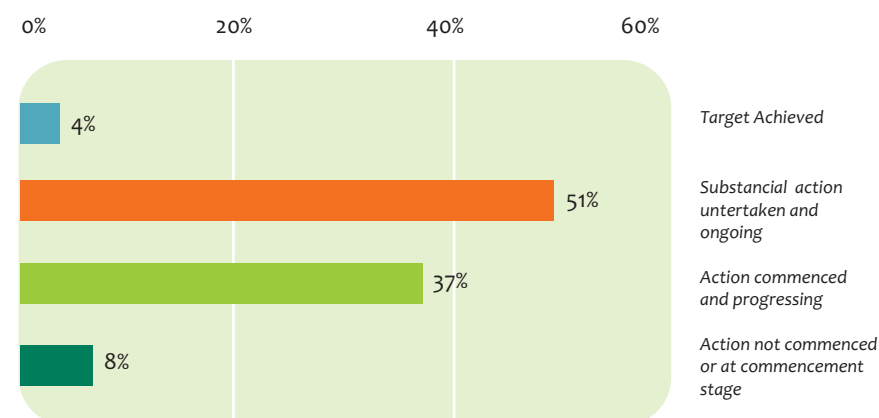
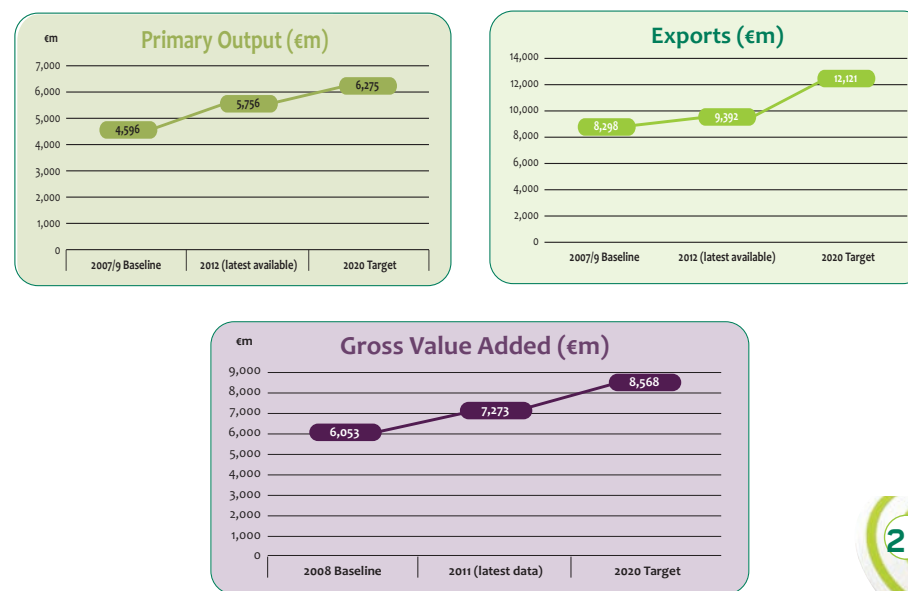


Figure 2: Update on FH 2020 Growth Targets



TRACKING FUTURE PROGRESS

Interim Benchmark Review

In 2011, the HLIC set out a number of milestones to be achieved by end 2013 and end 2015. This was to ensure that the Committee remained on track to deliver in full on the promise contained in Food Harvest 2020. At this mid-year stage, the indications are for a very promising end-year outcome.

End 2013 Milestone

Primary Sector

Progress

Increase Value of Primary Output by €300m

The value of primary output increased from the baseline figure of €4,596m to €5,756m, an increase of €1,160m.

Achieved ✓

9,000 farmers participating in discussion groups.

The number of farmers in Teagasc discussion groups has grown to 13,000 with an estimated 2,000 more in non-Teagasc groups.

Achieved ✓

5,000 Profit Monitors completed annually

6,342 e-profit monitors (an online detailed financial analysis tool) were completed in 2012.

Achieved ✓

New sheep demonstration farm established

The sheep research/demonstration farm established at Athenry is focused on optimising grass production, technical efficiency and best management practices for lowland sheep producers.

Achieved ✓

Expand the Beef BETTER Farm Programme to non-suckling systems

The Teagasc/IFJ BETTER Farm beef programme has been expanded and now encompasses 37 beef farms.

Achieved ✓

Two- year specialised farm manager training option delivered

The Teagasc 2-year Professional Diploma in Dairy Farm Management, validated by UCD, commenced in September 2012, with an initial intake of 19.

Achieved ✓

End 2013 Milestone

Value –added Sector

Progress

Increase Value-added by €500m

Agri-food value added has increased by €1,220m by end 2011 on the Food Harvest baseline figure.

Achieved ✓

Dairy industry investment in milk powder facilities

The first major investment in significant new capacity and capability was made by Glanbia in March 2013. Enterprise Ireland is in discussion with other large dairy processors in preparation for 2015.

Achieved ✓

New research facility for Dehydration Technology and Smart Ingredients completed

The new facility has been completed and is being extensively used by industry for development of new product and ingredients.

Achieved ✓

New FDI investment commitments by the infant formula sector

The infant formula business has gone from strength to strength, with new investment commitments already made in 2013. Further new opportunities likely to come on stream with the increased milk supply post 2015.

On Target →

New cheeses developed through Teagasc/IDB partnership

Under this initiative, 300 different cheese variants have been produced since July 2011. Three new varieties are scheduled to be launched on the market over the coming twelve months with 2 scheduled for Q4 2013.

Achieved ✓

Progress 2 industry led research centres

Significant progress has been made on establishing a Dairy Technology Centre with the key industry players now agreed on their common research priorities. A call for proposals from the research community is underway
Regarding the meat industry, the key industry players involved in establishing the Meat Technology Centre have agreed five core thematic areas and more detailed scoping is underway.

On Target →

PAS 2050 accreditation achieved for major primary products

PAS 2050 accreditation achieved for beef, dairy and poultry. Process for pigmeat and lamb ongoing with end-year expected completion date.

Achieved ✓

Launch new Irish drinks products in the US following consumer testing

Following a domestic market launch in Q2 of a new Irish drink product, a US launch is scheduled for Q4 2013.

On Target →

End 2013 Milestone

Exports

Progress

Achieve export target of €9bn

Bord Bia estimate that food and drink exports in 2012 exceeded €9bn with 2013 outlook remaining positive.

Achieved ✓

Lean Programme completed by over 20 large and 70 SMEs

The take up by Enterprise Ireland food clients has exceeded the target - with 21 large companies and 121 SMEs supported to date.

Achieved ✓

Brand Ireland concept developed

Origin Green has been developed, tested, launched and implemented.

Achieved ✓

L4G programme completed by 50 CEOs and 80 companies in specialist management training

The take up of Enterprise Ireland Leadership programmes has exceeded the target with 68 companies having participated to date and a further 17 companies taking part in the International Selling programme.

Achieved ✓

Increase share of exports to Asia from 4.3% to 5.5%

In 2011, the share was 4.4%, rising to 6.1% for the first half of 2013.

Achieved ✓

Increase share of exports to other euro economies by 3 percentage points

The share of exports to other euro economies has increased from 27.4% in 2010 to 28.5% in the first half of 2013.

On Target ✓

100 Marketing Fellows completed 450 commercial assignments

101 Fellows have completed 468 commercial assignments on behalf of 95 companies in 14 overseas markets by mid 2013

Achieved ✓

60% fellowship retention rate in sector

63% of the three Fellowship cohorts (76 participants) have secured jobs in the food and drink or associated industries. The 4th cohort will graduate this year.

Achieved ✓

Combined turnover of MAP (Marketing Assistance Programme) companies to grow by €90 million by 2013; jobs to increase by 290

MAP recipients since 2010 have collectively projected an increase in turnover of €95m with a jobs increase of 321.

Achieved ✓

End 2013 Milestone

Aquaculture

Progress

Offshore aquaculture location determined

Two sites off Galway deemed suitable with further locations off the Mayo and Donegal coasts being assessed.

Achieved ✓

Offshore aquaculture site selected

Two sites have been selected in Galway Bay close to Inis Oirr.

Achieved ✓

Planning received

An application has been submitted by BIM for an aquaculture licence for the cultivation of finfish near Inis Oirr. This application and its accompanying Environmental Impact Statement is currently under consideration.

On Target ⚡

Industry investment achieved

A significant number of investors have registered firm interest in the €60 million investment for the proposed deep sea organic salmon farm in Galway Bay. However, their interest cannot be further pursued until the licence determination is made

On Target ⚡

Target market assessed

A study of the EU market for organic Irish Salmon was carried out as part of the EIS for the Galway Bay Licence Application. Indications are very positive for this market segment.

Achieved ✓

Licensing issues significantly progressed

Aquaculture licence templates have been significantly revised, appropriate assessments and other measures completed, resulting in an increase in license determinations from 6 in 2011 to 115 in 2012. This or a higher level of determinations are expected in 2013.

Achieved ✓

End 2013 Milestone

Seafood

Progress

Increase value of seafood by €50m

Data from 32 BIM companies indicate that added-value sales has increased by €50 million in 2013 alone.

BIM estimate the end 2012 total value of the seafood sector at €845m, up from €712m in 2010. The CSO shows seafood exports have increased by 36% from €379 to €516 million over the same period.

Achieved ✓

Turnover of €40m achieved by one company

Two seafood companies have each achieved a turnover of €50 million. These firms are in the whitefish and organic salmon sectors.

Achieved ✓

Turnover of €20m achieved by 10 companies

Six companies achieved turnover between €15 and €30 million while 22 companies achieved turnover between €2 million and €15 million.

On Target ↗

Continental hub selected and investment agreed

The original concept of facilitating the development of a dedicated seafood hub on the European mainland has evolved into joint venture arrangements. Two have been established, one in France and the second targeted at the growing Chinese market.

Achieved ✓

Land & process catch from 4 foreign vessels per week,

In 2013, three Spanish vessels per week have been landing catches which are being processed and sold in Europe by Irish seafood businesses in the south-west, while Norwegian vessels landed 80,000 tonnes of blue whiting in 2012 in Donegal and 41,000 tonnes in 2013.

On Target ↗

TRACKING FUTURE PROGRESS

End 2015 Benchmarks

| Sector | 2015 Milestone | Key actions |
|-------------|--|---|
| Primary | Increase value of primary output by €700m | <ul style="list-style-type: none"> 10,000 farmers participating in farm development discussion groups 5,000 profit monitors completed annually Achieve milk solids of 359kg per cow Measurable improvement in GHG emissions per unit of output for beef Animal breeding programmes to contribute to increased annual genetic gain from €15 to €18 in dairy EBI and €5 to €10 in beef SBV. Restoration of Annex 1 habitats/species to favourable conservation status Reduced prevalence of herds with BVD persistently infected animals (PIs) |
| Value-Added | Increase value by €940m | <ul style="list-style-type: none"> Increase value of waste streams in meat industry Significant progress made in new cheeses and other food products through Teagasc/IDB partnership New Smart ingredients output from Teagasc Dehydration and Smart Ingredient facility Stream of new products with functional properties from FHI and other initiatives |
| Exports | Achieve €10bn in exports | <ul style="list-style-type: none"> Increase share of exports to other euro economies by 5% points (from 2010 levels) Increase share of exports to Asia by seven percentage points (from 2010 levels) Members of Origin Green to account for 85% of food exports |
| Aquaculture | <p>Harvesting commenced on 10,000 Tn unit</p> <p>Increase annual aquaculture production by 10,000 Tn</p> | <ul style="list-style-type: none"> Offshore harvesting commenced 17% increase in aquaculture production |
| Seafood | Increase value by €100m | <ul style="list-style-type: none"> Land/process fish supplies from 8 foreign vessels pw Develop high value product from shellfish, new products and new species 2 joint ventures established to grow business from higher value markets Turnover of + €50m achieved by 3 seafood companies |

