Beef 2020 Activation Group
Growing The Beef Sector

Introduction

Harvest 2020 set a target for the beef sector of a 20% increase (about €300m) in the value of output by the end of this decade. We were asked as a Group to recommend what needed to be done in a number of key areas to build on this target, which has been partly achieved through increased market prices in the last 12 months. The Group believes that a coordinated approach to the development of the beef sector, along the lines suggested in this report, which firstly and most importantly aims to maximise beef output from an expanding suckler herd while additionally optimising the beef output potential from the forecasted expansion in dairy sector can result in growth in the value of all beef output which significantly exceeds that targeted in Harvest 2020.

The beef opportunity principally derives from the capability of the sector to market beef to EU retail markets where beef production is forecasted to decline. We have therefore looked at these beef growth opportunities in the light of current and likely future market developments, particularly the on-going deficit in beef supply in the EU market and of the real prospects of other Harvest 2020 targets being achieved, particularly those related to the dairy sector. Taken together we believe there is market demand to support growth in the suckler and dairy herds to increase annual national cattle slaughterings from 1.5 million cattle currently to more than 1.8 million cattle by 2020. This increase exceeds 120,000 tonnes of beef annually. The EU beef deficit is currently 480,000 tonnes and is estimated to be in excess of 700,000 tonnes by 2020. The increased beef exports value to the economy of the additional cows, plus other improvements recommended in this report, should result in additional export value of up €550 million in 2020, and a much higher cumulative addition over the period.

The growing EU beef deficit and the effect of economic and social development on beef prices and consumption in emerging economies is likely to keep beef market prices, on average, considerably above the 2007-2009 levels, which was the base period for Harvest 2020.

The Group stressed that an ill-considered and unbalanced beef element in an EU- Mercosur trade deal has the potential to do considerable damage to the development of the Irish and EU beef sector. Nevertheless, in the Group's view, a focussed concentration on all factors impacting on the future development of the sector, some mentioned in Harvest 2020 itself and outlined in our terms of reference, can lead to the achievement of a beef sector value growth of up to 40% by 2020.

The Group has looked at a whole range of areas where we believe real progress is possible leading to very significant increases in the value of output. In particular we have made recommendations in regard to:

- Breed improvement
- More focussed research and wider technology transfer programmes
- Extension of the better farm programme and co-ordinating it with a technology adoption programme
- Greater concentration on dairy beef programmes
- Future shape of CAP support measures
- Implementation of eradication schemes for endemic non-regulated animal diseases
- Processing efficiencies

- More focussed and coordinated marketing centred on the Brand Ireland concept and involving development of niche markets in developed economies, access on a targeted basis to markets currently closed to beef and further development of some premium EU markets.
- Focus on opening, on a targeted basis, markets currently closed for live exports
- Specific pricing arrangements for winter beef production, extension of the Quality Payment System and the closing of the price gaps with our main trading partners.

To ensure that we reinforce and improve the position of Irish beef on our key export markets it is essential that suckler cow numbers are maintained and, if possible, increased. Many of the suggestions referred to above are designed with that aim in mind. In addition, the targeting of some of the direct payments specifically on suckler production could play a significant role in ensuring that the target is achieved. While this may not be feasible currently (without activating Art 68 in 2011), it should be possible in the new post 2013 system and we recommend that ensuring that this option is available is a priority in the Irish approach to the negotiations on the new system. This, combined with other measures, could see an increase of over 150,000 in Irish suckler numbers (i.e. back to the national herd size in the middle of the last decade).

2020 Increase in Output

	€M
Extra Suckler Cows	130
Extra Beef From Dairy Herd	125
Improved Calving Rate	115
Genomics	100
Animal Health	30
Other Improvements	50
Total	**550**

The Beef Sector in the Irish Economy

There is a wealth of independent analysis to show that the economic footprint of the beef sector within the Irish economy is far larger than that of other manufacturing industry, and that it makes an enormous direct and indirect contribution to employment and economic output. Key facts are as follows:

- **Ireland's largest indigenous industry.** Agriculture is Ireland's largest indigenous industry. In 2010 the beef sector represented 28% of output value, with ex farm sales valued at €1.4 billion, of which approximately €160 million is comprised of live exports, and factory turnover of €1.8 billion and SFP payments to beef farmers, arising from historical production levels, bringing an additional €850 million in income to the sector.
- **Beef is employment rich.** 100,000 Irish farm families, including 60,000 specialist beef producers supplying a sector which sustains approximately 7,700 jobs in processing sales and marketing.
- **Beef is export led:** 90% of beef output exported, valued at €1.51 billion in 2010;
- **Beef enhances Ireland's reputation for quality**: Irish beef is currently listed with over 60 blue chip retailers and Food Service Operators in the EU. Irish beef sector has transformed its market focus over the past decade to high value EU markets, and today some 99% of exports are within the EU.
- **Beef contributes more to the Irish economy than other manufacturing industry**: For every €100 of exports in 2005, the net foreign earnings from Agri food were €48, compared to €19 for other manufacturing sectors, including "modern economy " sectors such as pharma and ICT. The beef sector sources in excess of 90% of its inputs in the Irish economy .The Group believes, therefore, that the multiplier for beef is even higher, because of its large number of wholly indigenous beef suppliers, its regional spread, its purchase of goods and services from indigenous sources and its extremely low import content.

- **SMART:** Application of technology and best practice which is already well developed in Ireland at institutional level, can generate significant further efficiencies at farm and industry level; world pioneering advances by Irish institutions in genomics will accelerate beef output productivity;
- **Green :** Studies published by the European Commission's Joint Research Centre in March 2011 show **that Irish grass-fed beef has one of the lowest carbon footprints globally (**19 kg of CO_2/kg for Irish beef, compared to an EU average of 22.2kg an estimated 80kg in Brazil, based on a full lifecycle analysis); the sustainability credentials of Irish beef are equally strong in terms of water usage and animal welfare;
- **Growth:** Global Population will increase to 9 billion by 2050 and demand for food will increase by 70% in that period. This fact, together with increasing urbanisation, affluence and the westernisation of diets in developing countries, mean that demand for beef and beef products will grow. Ireland must plan to be part of that growth dynamic.

ACTION	RESPONSIBLE	TIMEFRAME
The Suckler Herd The suckler herd is the basis of our quality beef industry. It underpins our premium beef offering on domestic and export markets. Nevertheless there is a reasonable consensus that any decline of the herd in the long term, would threaten the viability of a premium beef industry which is a strategic national economic asset capable of contributing very positively to a national economic recovery programme in terms of employment and increased exports, and that : • output from the suckler herd is considerably less than it should be; • much of breeding practice does not optimise its potential; • grassland management and other farm practices (e.g. stocking density) are often behind those on dairy farms, and • farm profitability is low, but can be significantly improved. The recommendations in the following sections are intended to address these problems and lay the basis, not just for achieving, but for exceeding, the Harvest 2020 targets. **Suckler Cow Welfare Scheme** The Group's view – backed by virtually all the consultations it had during the course of its work – is that this scheme is of critical importance to the maintenance of the suckler herd. Not only has it tended to improve quality and limit the decline in numbers, but it has also provided invaluable information to all stakeholders, especially to the ICBF and Teagasc, and enhanced the value of Irish weanlings for finishing for slaughter in Ireland or for live export.		

The Group is, of course, fully conscious of the very difficult situation in regard to the public finances which inevitably requires hard decisions to be taken. In that context ***it considers that the highest priority should be attached to, at a minimum, the maintenance of this scheme, and, if possible, to its improvement in the future.*** ***The Group also recommends that the scheme be retained beyond its current application period. That continuation should be tied to a review of its conditions, which would include consideration of quality and performance criteria requiring participants, for example to implement some of the following :*** • ***weigh animals systematically and supply the information to ICBF;*** • ***be members of Herdplus;*** • ***use tissue tags and participate in a BVD testing programme;*** • ***be members of the Bord Bia Quality Assurance Scheme, where appropriate;*** • ***be members of a beef technology adoption programme*** Any weighing requirement would become compulsory only if, and when, the weighing system referred to in breeding section below is put in place.	Lead: DAFM Support: ICBF and Teagasc	2012

<u>Direct Payments</u> The Group fully accepts the common view expressed by all the organisations and individuals consulted as to the critical importance of direct payments not just for farm incomes but as vital support for the whole livestock industry. ***It strongly supports the call by all that these payments be retained and directed to active farmers and thus ensure that the current level of support is at least maintained for active beef farmers.*** It acknowledges that the basis for distribution among active farmers may, however, have to be different than in the past and that member states may be given more discretion in this regard in the future.	Lead: Department of Agriculture, Marine and Food: Supported: Teagasc and ICBF and the Farm Organisations.	CAP negotiations immediate - implementation post 2013
In that event***, the Group recommends that the post 2013 system be sufficiently flexible to permit part of the Irish 'envelope' be used to provide a sizeable annual coupled aid to be paid on suckler cows, using calf registration to activate payments. It should also be sufficiently flexible to permit the application of quality and better management criteria.*** This proposal should ensure that the suckler herd is first of all stabilised and then increased, and its quality improved into the future. Any such scheme could not, however, in practice come into operation until 2014 at the earliest.	Lead: Department of Agriculture, Marine Support: Teagasc , ICBF Processors Bord Bia	CAP negotiations immediate - implementation post 2013
The Group also recognised the window of opportunity that exists up to 1st August 2011 for Ireland to notify the EU Commission, of its intention to use the facility afforded under Articles 68 and 69 of Regulation 73/2009, to direct a modest portion of the SFP from 2012 onwards to provide a specific top-up aid for suckler farmers. The Group was not unanimous, however, on whether to recommend that this facility be exploited in the run up to 2013.	Processors and Bord Bia	

Actions	Responsible	Timeframe
<u>Beef Prices and Contracts</u> Improved farm efficiencies, better genetics, stronger R&D and better performance in technology transfer will all play a part in increasing returns to beef farmers and contribute to increasing the supply of good quality beef animals. These issues are dealt with in later sections. Efficiencies at processor level, including the employment of best practice technologies to maximise carcase value, better utilization of capacity and a more coordinated marketing effort to exploit the particular attributes of Irish beef and the 'brand' image of Ireland will contribute to improved returns within the industry, including at farm level. As outlined extensively elsewhere in this document, improvement in farm productivity is an important goal for each beef producer. Nonetheless, price is a major incentive to driving efficiencies and improving performance. Because of transport costs to our main markets and other factors, in particular market premium for domestic beef and exchange rate impacts, Irish prices have historically lagged British and EU average prices. Irish cow prices have, however, mostly exceeded those elsewhere in the EU; the price gaps in the case of steers and heifers have been generally narrowing over the past five years and have been largely eliminated in respect of cattle in receipt of the QPS quality bonus. ***Better efficiencies in processing and marketing should ensure that these gaps in price are minimised. The aim should be to ensure that Irish prices are normally comparable to those in other EU beef producing member states.***	Lead: Beef Processing Industry Support: Bord Bia	2011 onwards

More predictable prices for winter finished cattle is seen by farmers as an essential element in the development of the industry. The more widespread use of contracts would, of course, provide certainty and are, therefore, a desirable objective. Nevertheless, the Group understands the difficulties the processing industry faces in moving to a generalised contract system. ***It can only recommend that the industry continues to seek to overcome those difficulties.***	Lead: Beef Processors Support: Producers	2012 onwards
The Group would, however, underline that the absence of some contractual arrangements presents particular difficulties for those who market cattle over the winter period. They are exposed to potentially greater loss making situations than other beef finishing systems. This is a clear impediment to the future development of the industry.		
The Group, therefore, believes that a specific targeted solution to this problem is required. There are various mechanisms that should be considered, one of which is a ***winter finishing minimum price (expressed in €/kg finished weight) negotiated annually between the individual processor and the individual farmer for spring marketed animals, taking into account additional over wintering costs.*** This arrangement would aim to protect those farmers who bought-in or valued on-farm cattle at a price consistent with the actual beef price in the Autumn against serious loss. It would not protect those who over-valued own stock or overpaid for bought-in cattle. This arrangement would assist producers and processors who wished to enter into mutually beneficial commitments based on market realities and would undoubtedly remove a substantial proportion of the farmer's financial exposure. It is hoped that in time such arrangements could apply to a growing proportion of winter finished cattle.	Lead: Beef Processors Support: Producers	2012 onwards

Quality Payments System(QPS) – General The QPS is generally regarded as being of considerable benefit to beef producers and as having positive influence in improving quality. *The Group recommends the continued application of the Beef Quality Payment System (QPS) which provides a National Standard focussed on quality determination and rewarding producers based on carcase suitability for market requirements.* There remain some perceived problems in regard to specific categories. ***The Group recommends that the current QPS be maintained but be periodically reviewed to ensure that the price differentials continue to reflect market realities.*** **Quality Payments System – Young Bulls** Bull beef production is becoming an increasing part of the Irish production system, accounting for 19% of prime cattle slaughtering in the first half of this year compared to 14% in the same period in 2010 and just 7% in that period five years ago. There are clear advantages to beef farmers who can operate a *market oriented* bull beef system and the continued development of such systems could add significantly to the value of beef output over the years up to 2020. It is important to ensure that increases in bull beef production are in line with market requirements, given that the image of Irish quality beef has been built up over years on the basis of steer and heifer grass-fed beef. It is clear, for instance, that the UK trade requires bull beef to be from animals slaughtered under 16 months of age. It appears clear also that some Continental markets can accommodate limited volumes of superior quality beef from bulls slaughtered at ages up to 20/22 months, so long as they are finished in a way that produces meat that has the	Lead: Processing Industry Support: Producers, Teagasc and Bord Bia	2011 onwards

visual and taste qualities that their consumers require. It is equally clear that there is a greater and preferred demand in these markets for Irish steer and heifer beef in preference to Irish bull beef. Steer and heifer grass-fed beef, which provides our point of difference in the marketplace, is therefore more likely to be retail listed than Irish bull beef. Cattle presented for slaughter should reflect these realities. ***The Group, therefore, recommends that the QPS principles and appropriate market specification guidance be extended to young bull beef as soon as the base line scientific meat yield data is available from Teagasc so that the payment differentials properly reflect market requirements. We further recommend that Teagasc intensify its research into the eating qualities of mainly grass fed bull beef in different age categories.***	Lead: Processors Support: Producers, Teagasc , Bord Bia	2011-2012

Breeding ICBF has brought a new emphasis on good breeding practice and its pioneering work remains essential to the development of the industry. ***It is important that its funding is maintained and that it work to a targeted programme.***	Lead: DAFM Support: Teagasc/ICBF/AI Societies	2012-2020
A new index allowing beef and dairy farmers to breed the most suitable suckler cow type should be developed. This should cover better maternal traits, improved fertility, ease of calving, milk yield and better weight gain leading to higher slaughter weights at an earlier age. This should, inter alia, lead to an increase in the average calving rate in the suckler herd from 0.8 to 0.9 calves per year which alone would add about €100m to the value of annual beef output.	Lead: ICBF Support: Producers, AI Societies , Teagasc	2011-2013
An index for beef bulls used on the dairy herd needs to be developed concentrating on calving ease, short gestation, high calf value and low calf mortality.	Lead: ICBF Support: AI Societies, Teagasc, DAFM	2011-2013
Enhanced use of **sexed semen** could increase the number of beef bred calves from the dairy herd by up to 30%. This has the potential to significantly raise the value of beef output. ***The availability, and cost, of reliable sexed semen needs to be ascertained as a matter of urgency.***	Lead: ICBF Support: Teagasc, Farm Organisations, DAMF	2012-13
Best breeding practice for both the suckler herd and for beef from the dairy herd needs to be clearly set out in a roadmap and actively promoted by the Department, Teagasc, ICBF and farm organisations. An outline of such a roadmap is set out in Appendix 1.	Lead: Teagasc Support: ICBF, Farm Organisations, DAMF	2011-2020

Genomics has the potential to improve beef breeding in Ireland significantly. With one exception, all the main requirements (accurate evaluation, stored DNA, research capabilities and ability to implement results) are in place to complete the research needed to evaluate the potential of genomic technologies to increase the contribution of cattle breeding to profitable beef production. The exception is funding for genotyping which is estimated to require about €1.5m. The benefits from genomic technologies are currently estimated to be potentially worth about €10m a year cumulatively to beef farmers over the next ten years i.e. about €100m per annum after ten years of implementation. ***It is suggested that mechanisms for meeting the one- off cost of completing the genomic research be considered by the High Level Group referred to under Beef Industry Research (see below).***	Lead: ICBF Support: Teagasc, Producers, /DAMF	2012
Weight recording is a critical element in breed improvement and better farm practice. Many farmers are already weight recording but the cost of providing appropriate weighing equipment is prohibitive for the average suckler farmer. To try to ensure that this practice is fairly universally applied it is recommended ***that a general weight recording service is made available through a range of service providers as outlined in appendix 1.*** The once off cost of providing suitable equipment for this service should be met from any funding being provided for the encouragement of discussion groups. If this service is in place weight recording, as outlined in the appendix, can, as suggested in the section on direct payments above, be made a condition of participation in appropriate premium schemes.	Lead: ICBF Support: Producers AI companies, Marts, Farm Relief Services	2012/2013

<u>Animal Health</u> The presence of a number of endemic non-regulated diseases in the national herd involves significant losses for the beef industry, and particularly for beef farmers, It is estimated that BVD alone may be costing €15-€20 per cow in the national herd. There is also a longer term potential loss in reputational damage. It is, therefore, very important that the eradication of these diseases is actively pursued. The development of an effective and comprehensive animal health database is essential if the eradication aim is to be effectively implemented. This is already underway. ***The development needs to be supplemented by a system under which information on certain production diseases, especially, but not exclusively, liver fluke, and other aesthetic quality issues (e.g. bruising,injection sites, etc) is captured atinspection points in the meat plants and communicated to farmers and their vets and captured on the database.***	Lead: DAFM Support: Meat Processors/AHI	2012-2015
The introduction of an industry led programme to eradicate BVD is essential and should be rolled out from next year. This should be voluntary in year 1 but compulsory thereafter. The detailed timescale for a suggested eradication programme is set out in Appendix 2.	Lead: AHI Support: Producers, DAMF, Teagasc, Processors	2012-2015
This should be followed by a similar programme to eradicate IBR. ***To facilitate the first mentioned eradication programme it is essential that the identification tag be a one with tissue test capability. The use of the brucellosis blood samples to identify IBR (and Johnes) would greatly facilitate the roll out of the eradication programme for that disease. There is need also to develop a common BVD sampling and reporting protocol and provide through a Statutory Instrument for its application.***	Ditto	2013-2016 2011

R& D and Technology Transfer The Better Farm Programme has been successful in substantially increasing output and gross margins from €386/ha to €563/ha between 2008 and 2010 on the participating beef farms, with a projected increase to €700-€800 /ha in gross margin in 2011. . Its extension should be a major priority for Teagasc. Industry participation will be essential for extending the programme, in addition to appropriate Teagasc resources. ***The Group recommends that a model based on the programme be extended to the full extent permitted by the resources available in Teagasc and among private consultants. At the very least there should be a minimum of one participant in each county and more in those counties with the highest concentration of beef farmers. As well as the very significant benefit to the participating farmers themselves, this would ensure that there would be a countrywide network of 'Better Farms' to help encourage the uptake of best practice technologies on beef farms. This should be accompanied by a communications strategy to ensure that the lessons learned from the programme are widely disseminated, and using participants in the programme as advocates for improved farming systems.***	Lead: Teagasc Support: Agricultural Consultants, Farm Organisations, Processors, DAFM	2011-2020
The Group recommends that public funding for the beef R&D technology transfer programme should be at least maintained.	Lead: DAFM Support: Teagasc	2012
Beef Technology Adoption Programme The Dairy Efficiency Programme has been a signal success. The approach now needs to be extended to beef but adjusted to the particular circumstances of the sector. ***The Group recommends that an effective discussion group system be linked to the extended Better Farm network***		

and that participation in such groups be encouraged through publicly funded support similar, but not necessarily identical, to that provided under the dairy efficiency programme. This system should extend to Suckler farmers and the Group calls on Teagasc to take the lead in ensuring that the needs of these farmers are adequately met. It should also focus on those finishing animals and this system would be most effective if it were assisted by the processing industry. The Group would recommend that Teagasc arrange for one or two advisors to work with each meat plant to encourage participation in farmer groups in the appropriate geographical area. In addition to providing **o**rganisational skills, the processors could assist with facilities, the provision of information (e.g. on market requirements) and contribute to consequential expenses Farmer participation should be dependent on meeting specific quality and performance criteria. The Group understands that this would require a commitment from Teagasc that may not have the resources initially to meet in full. It considers, however, that, as advisors previously tied up on REPS work gradually become free, the resources should be available. Over time the successful adoption of technologies demonstrated to be effective through this programme has the potential to increase the value of output on beef farms by at least 25%. A more detailed outline of the proposed system is set out in Appendix 3. ***The system needs to be supported by an effective research and technology transfer programme in respect of both the production and processing sides of the industry:*** This should result in the profitable production of high quality beef meeting market requirements, and its focus should include : • grassland management, including management of clover swards • improved genetics • herd health	Lead: DAFM Support: Teagasc/ Agricultural Consultants/Processors/Farm Organisations Lead: Teagasc Support: Universities	2011-2020 2011-2020

• earlier slaughter age • reducing production costs • Bull beef systems most suited to grass based production • Effective dairy beef production systems • Processing techniques and practices (see later section). Such a programme, if properly focussed on the aspects of these broad research areas with the greatest potential, could add substantially to the value of beef output. For instance, the development of effective dairy beef production systems could increase the value of the expected surplus from the dairy herd by over €150m.		
The Dairy Research Fund, managed by an industry representative trust and financed by a small voluntary deduction from the milk price, has played an important role in advancing research in the sector. The deduction amounts to about €2m a year but leverages a significantly greater total research spend***.*** **It is recommended that a small high level group be established, representative of the stakeholders (farmers, processors, researchers etc.) to recommend how the programme could be enhanced and how it can be most efficiently funded. This group should make its recommendations by the end of 2011.**	Lead: DAFM Support: Farm Organisations/MII/Teagasc Universities	2011
Short to medium term internships could play an important part in getting young science graduates involved in beef research and in the area of technology transfer to beef farmers**.** ***The Group recommends that the Government internship initiative be extended to facilitate this development.***	Lead: Department of Jobs, Enterprise & Innovation Support: DAMF, Teagasc	2011

Farm Competitiveness The technology adoption/better farm programme arrangements described above should be the centrepiece of an effective technology transfer system for beef farms. Much will, however, depend on the ability of Teagasc to deliver the programme. ***To monitor how effectively that is being achieved, measurable targets should be set, for example in relation to numbers in herd plus, participation in profit monitor, beef technology adoption programme and/or the better farm programme, participation in BQAS, or number of prime animals under 30 months slaughtered.***	Lead: Teagasc Support: ICBF, DAFM	2011
Meeting and exceeding the 2020 targets in general, and in particular the target for beef, will require considerable on farm investment. ***It is, therefore, extremely important that in the new Pillar 2 following CAP reform increased funding is provided for farm investment programmes under Axis 1.***	Lead: DAMF	CAP Negotiations immediate – post 2013 implementation
Beef from the dairy herd will inevitably make up an increasing proportion of beef output as we approach 2020. Increased output from the dairy herd has the potential to add significantly to the value of beef output but only if efficient and profitable production systems are in place that are designed to ensure that returns from this extra output are maximised. ***It is essential, therefore, that Teagasc and the processing sector intensify the research effort in this regard and that the technology outcomes are effectively transferred through an effective communications strategy.***	Lead: Teagasc Support: Processing Sector	2011-2013
Beef farmers generally would benefit considerably from having focussed precise information available to them on the range of issues, ranging		

from production factors to quality and market requirements, which affect the returns from beef farming. ***The Group recommends that the industry, ICBF and Teagasc collaborate to communicate this information to farmers***	Lead: Teagasc Support: Processors, ICBF	2011
Competitiveness: The Beef Processing Industry operates in an extremely competitive environment on tight margins. The Group considers it essential if the industry is to remain competitive that costs such as those relating to energy generation costs, waste and labour be brought into line with those of competitors in other member states.	Government	2012 onwards
Labour Skills: The Beef Processing sector remains a labour intensive business. In the current economic climate there is increasing interest and availability of people, with little if any previous experience, to work in the processing business. This creates a need for appropriate training programmes for new employees and up-skilling of existing staff. **Specific Skillnet programmes operating to FETAC Level 5 standard need to be supported by the relevant Education and Training agencies.**	Lead: Department of Education and Skills: Support: FAS, Teagasc	2011-2020
<u>Processing and Marketing</u> **<u>Guaranteeing food safety is an indispensible element of ensuring the continued growth of the beef sector. It is recognised that this responsibility rests primarily with the FBO and that processors will have to continue to invest in their food safety management systems.</u>** An effective and transparent meat inspection service is essential from a food safety point of view and to underpin the reputation of Irish beef. The present service operated by DAFF fully meets those objectives but at a cost which may be unnecessarily high**.** ***<u>The Group recommends that</u>***	Lead: Processors Support: FSAI, DAFM	2011 Onwards

the Department review the service with a view to modernisation in line with EU developments and reducing costs without sacrificing effectiveness. As the user of the service, the industry must be part of the review process, to ensure that the service is aligned with industry operations but also considering how it can organise its own operations to facilitate making the service more cost effective	Lead: DAFM Support: Processors, FSAI	2011-2013
Mechanical grading has played a part in limiting the cost of the Department's service at meat factories and in making grade assessment more objective**. *It is important that confidence in the system remains high and, to this end, the operational accuracy of mechanical grading, and the calibration of the system, should be regularly checked. In addition, research should be undertaken to enhance the mechanical grading capability to provide predictive information on saleable meat yield.***	Lead: DAMF Support: Processors, Farm Orgs, Teagasc	2011-2020
The widening of the market for Irish beef within the EU in recent years has been a remarkable success story, with the result that there is considerably less reliance on third country commodity markets. There is still, however, room for considerable further development in regard to market penetration. ***In particular, the Group recommends:***	Lead: DAFM	2011
• ***the appointment by the Department of a dedicated resource with responsibility for market access for Irish beef and livestock to targeted third country markets (important for certain specialised beef products in particular);***	Lead: Processors, Sup[port: Bord Bia/DAFM	2011-2020
• ***seeking to develop niches for Irish beef on high value markets, such as Japan and the US***	Lead: DAFM	
• ***Securing access to China for beef and beef offals;***	Support: Bord Bia, D. Foreign Affairs, Processors	2012
In the latter context, the Group notes the potential for greater sales in certain developed EU markets of high quality cuts has been increasing due in part to the fall off in supplies from South America. Addressing this		

issue will require an enhanced and coordinated effort from Bord Bia and the beef companies. Building the reputation of Irish beef and leveraging off that reputation are key factors in greater market penetration at enhanced value for Irish beef. In that context a number of factors seem to be important: • ***developing the Brand Ireland concept and a morecooperative marketing approach by meat companies under that broad image;*** • ***creating a greater point of differentiation for Irish beef;*** • ***re-examining the PGI possibility for Irish beef, and completion of the work to validate the promotion of Irish beef on a low carbon footprint and wider environmentally sustainable criteria.*** The last mentioned point is of particular significance as it opens the prospect of creating a special selling point that will become increasingly important in the future, especially on developed markets.	Lead: Bord Bia Support: Processors, Teagasc, DAMF	2011-2020
The beef industry should develop R&D partnerships with Teagasc Food Research Centres in the following areas: • ***market led initiatives to meet targets set out in Harvest 2020 (e.g. Innovation Partnerships, Industry Led Competence Centres*** • ***utilisation by the beef industry of pilot plant facilities in Teagasc, Ashtown.*** • ***public-private-partnership focused on developing new consumer led products*** • ***A Beef Industry/Teagasc student/graduate placement programme***.	Lead: Processors Support: Teagasc	2011/2012

<u>Taxation and Land Policy</u> Greater farm consolidation, increasing farm scale and earlier transfer of farms are vital elements in the future development of the beef sector. It is important that taxation policy continues to be operated in a way that encourages that development. To that end ***the Group recommends that stamp duty and capital gains tax provisions be operated in a way that facilities farm consolidation and the improvement of farm viability through land purchase. We further recommend that the capital acquisition tax encouragement to the early transfer of farms and the income tax reliefs in respect of land leasing be maintained.***	Lead: D. Finance Support: DAFM	2011
<u>Farm Credit</u> The agri food sector is widely seen as having a significant role to play in national economic recovery. The availability of sufficient credit is essential if it is to play that role effectively. ***The onus is on the financial institutions, and especially on the guaranteed banks, to ensure that adequate, and competitively priced, credit is made available to the sector and*** **that in the case of farmers the repayment terms take account of the time scale of agricultural activity and the security available (e.g. chattel mortgages). The Credit Review Office might be given an enhanced role, and if necessary increased resources, to monitor this situation.**	Lead: Banks Lead: Department of Jobs , Enterprise and Innovation Support: Credit Review Office	2011 2011/2012
The Group accepts that difficulties in accessing credit are sometimes due to farmers' inadequate financial management and poor financial records. ***It recommends that Teagasc and agri consultants/accountants and banks play a greater role in assisting farmers in this regard and that greater emphasis is placed on this issue in agricultural college and***	Lead: Teagasc/Agri Consultants/Banks	2011/2012

other agri courses. **<u>Mercosur</u>** An EU/Mercosur deal, involving an ill considered and unbalanced beef element, has the potential to do very considerable damage to the Irish and EU beef sector. ***The Group strongly supports the stand taken by the Minister and the Department on this issue. The Irish beef industry currently supports approximately 100,000 Irish farm families and almost 8000 jobs in processing, marketing and sales, which is of National importance. In our view, imports of beef into the EU should originate only from countries where equivalence of standards apply. Any additional import volumes must be minimised and if additional quantities are contemplated, they should be spread across the different value cuts in proportion to carcase composition.*** **<u>Supply Chain</u>** The Programme for Government contains a commitment to introduce a Fair Trade Act. ***The Group recommends that, in that context, there should be a specific examination of all levels of the beef supply chain with a view to ensuring that transparent and equitable arrangements apply. Given that 90% of Irish produce is marketed elsewhere in the EU, any such arrangements could be effective only if similar measures apply at Community level. This should be a clear Irish policy objective in EU negotiations.*** **<u>Ongoing Sector Engagement</u>** ***The Group recommends that this Beef Activation Group meets annually to review progress on the attainment of the 2020 recommendations in the Food Harvest and this report. To assist the Group in this task the***	Lead: DAFM Department o f Jobs, Enterprise and Innovation, Support: DAFM Lead: DAFM Support: High Level Implementation Group, Beef 2020 Action Group	2012 2012/2013 2012 onwards

Group recommends that the Department compile a suite of key technical and commercial sectoral bench mark measurements to be used to evaluate progress in future years. A draft list of possible parameters is shown at Appendix 4. **<u>Funding of Bord Bia</u>** Bord Bia has done a good job over the years in the promotion and marketing of Irish beef, on relatively limited resources. It is essential that it be enabled to continue to do this into the future, when its task – particularly around the Brand Ireland concept – will be even greater than in the past.. ***The Group regards it as vital the Bord's funding, – involving both industry and Exchequer monies – and including that earmarked for the BQAS, be maintained at a level commensurate with that task.***	Lead: DAFM Support: Department of Finance	2012 onwards

Beef Breeding Road Map. **APPENDIX I**

Recommendation. *Best breeding practice for both the suckler herd and for beef from the dairy herd needs to be clearly set out in a roadmap and actively promoted by the Department, Teagasc and ICBF. An outline of such a roadmap is set out in Appendix 1.*

i. Background. Current rates of genetic gain in the National Suckler beef herd are some €3/cow/year (average genetic merit of commercial females born in 2010 is €58). Based on experiences from the dairy herd and previous work on Irish beef breeding programs, ICBF and Teagasc are confident that this rate of genetic gain can be increased to €10/cow/year by 2020. Achieving this level of increase would have significant effects on technical and financial performance at farm level, an example of which has been given in the recent Teagasc beef road-map for Suckler steer calf to beef production systems. (Similar improvements would be seen across other types of beef production system).

Table 1. Technical and financial performance for suckler steer calf-to-beef production (including bull beef).

Increasing Genetic Gain – Specific Initiatives. ICBF have recently undertaken a comprehensive review of its beef breeding program and identified a number of areas for particular focus over the next number years, as we look to support the outcomes from the Harvest 2020 consultation. This work was undertaken in consultation with Teagasc. A total of 6 work areas have been identified. These include;

- Closer working relationship with bull breeding herds.
- Early identification of bulls for the G€N€ IR€LAND breeding program.
- Increased data recording in commercial herds, particularly those involved in progeny testing and research initiatives.
- A re-evaluation of the role of the Tully performance test centre.
- Increased participation in the weight recording service offered through ICBF Beef HerdPlus.
- Increased focus on priority traits for beef breeding.

Additional details on these work areas including specific recommendations is given below.

- *Closer working relationship with bull breeding herds.* The objective of this initiative is to; "work with those pedigree breeders whose goal is to produce high index, high health status bulls for natural service and AI". It is proposed that ICBF would develop a new voluntary program for elite bull breeding herds, where farmers would adhere to principles of best practice in relation to data recording and animal production. In return they would receive; (i) a data quality index (based around timeliness, completeness and normality of data), (ii) a data quality/production stamp for subsequent use in marketing/promotion of stock, (iii) directed breeding advice (e.g., mating's on elite females), from ICBF technical staff, (iv) access to a local and/or regional breeding discussion group for additional technical support, and (v) priority access to ICBF beef breeding programs including G€N€ IR€LAND and new developments such as genomics. An important component of the best practice in data recording program would include full recording of all relevant data including inseminations, calving, weaning, culling and a commitment to weight record all pedigree animals for breeding at least 3 times per year. In addition these herds would be involved in an approved Animal Health Ireland, Herd Health program.

- *Early identification of bulls for the G€N€ IR€LAND breeding program.* The objective of this initiative is to; ensure a steady stream of high quality bulls for the G€N€ IR€LAND breeding program. It is proposed that ICBF would co-ordinate a new beef breeding program involving bull breeders, herdbooks, AI companies and commercial farmers. Teagasc would provide technical support to the program. It is anticipated that the collection of semen from bulls

would be undertaken across a number of AI centres, to minimise threat from disease. As part of the program, bulls would be owned by AI companies, breeders, or a combination of both, with cost of semen collection covered for by the program. It is anticipated that this development would help overcome one of the major constraints on Irish beef breeding, that is the very low number of bulls that are progeny tested on an annual basis (10 bulls across all of the beef breeds).

- *Increased data recording in commercial herds, particularly those involved in progeny testing and research initiatives.* The objective of this initiative is to; to ensure accurate proofs for all AI sires. As with the bull breeding herds, these herds would be involved in the best practice in data recording initiative as identified above. Users of the service would be required to weight record their calves at least once per year (at 5-7 months), but would be encouraged to record all growing animals at least 3 times per year. In addition these herds would have access to ICBF technical staff, a suckler discussion group and any new breeding developments such as genomics.

- *A re-evaluation of the role of the Tully performance test centre.* The objective of this initiative is to; make the maximum use of Tully facility as a means to achieving genetic gain in our National beef herd. At present the primary focus of the Tully performance test station is; (i) the collection of feed intake data, (ii) unbiased measure of growth and performance, (iii) the identification and health screening of bulls for G€N€ IR€LAND breeding program and (iv) as a focal point for genetic improvement. Unfortunately, these objectives are not being met with lower than expected numbers of high index bulls going through the centre and very few bulls being purchased for AI. As a consequence the cost benefit of the centre is being challenged. It is the view of ICBF and Teagasc, that Tully has an important role in the future of Irish beef breeding but in a slightly different guise. A number of options are currently being considered including performance testing commercial animals (the progeny of G€N€ IR€LAND AI bulls) for feed intake, growth performance and carcass traits (including meat quality). Other options for collecting feed intake data are also being considered including from commercial feedlot environments. In addition there is the possibility of involving females during the performance test period and recording data on important fertility traits such as onset of puberty. All of this work is currently being considered as part of a "Tully review" which is ongoing at present.

- *Increased participation in the weight recording service being offered through ICBF Beef HerdPlus.* The objective of this initiative is to; provide a high value low cost weight recording and reporting service for pedigree breeders and commercial farmers. It is anticipated that this would largely be achieved through an increased offering of weight recording options (DIY, EDIY, technician) and that these would be offered through a range of potential service providers, e.g., Marts, AI companies & Farm Relief Services (FRS). As indicated earlier, users of the service would be required to weight record all calves at least once per year (at 5 – 7 months), but would be encouraged to record all growing animals at least 3 times per year (at turn-out, summer & closing). It is anticipated that an additional weight would also be captured at the time of birth using a "measuring tape/weigh band".

- *Increased focus on priority traits for beef breeding.* The objective of this initiative is to ensure that ICBF and Teagasc are focused on priority traits for future development of the €uro-Star indexes. These are mainly "cost of production" traits, as these are the traits that will become more important in future years (with constant beef price and rising costs at farm level). Example traits include; weight recording (especially maternal weaning weight), female fertility and survival (including onset of puberty), feed intake (via Tully and/or commercial feedlots), meat quality and new traits such as GHG (Green House Gas Emissions). A large element of the initiative will involve the identification of early and easy to record predictors at the farm level, e.g.,

cow milk score (as a predictor of maternal weaning weight). This will require accurate phenotypic recording of each traits on research farms, coupled with recording of various predictor traits.

iii. Additional components. There are a number of additional components that will also contribute significantly to the road map. These include;

- The implementation of genomic selection in beef, including the development of breeding programs to exploit this technology.
- Updating the economic values in the Suckler Beef Value. This would include the establishment of a number of new indexes for selecting commercial female replacements and beef from the dairy herd,
- The introduction of a new suckler herd at Teagasc Grange, with increased focus on maternal traits
- The establishment of a "beef bio-economic" model to support the beef industry and underpin the economic values within the €ur-Star beef indexes.
- Increased use of sexed semen in the dairy herd.

Each of these elements has been identified as recommendations in their own right (or components off stated recommendations) within the overall Harvest 2020 activation plan.

iv. Summary recommendations. The following is a summary of the recommendations to ensure delivery of the road map.

- Establishment of a voluntary program to support the production of "high index and high health status breeding bulls" from pedigree herds.
- Increase in number of high index bulls involved in G€N€ IR€LAND beef breeding programs.
- Establishment of discussion groups, with a strong focus on beef breeding.
- Increase in number of technical people equipped to support needs of; (i) bull breeding herds, (ii) commercial herds, and (iii) discussion groups.
- Review of the future role of the Tully performance test centre.
- Increase in level of weight recording on Irish beef farms.
- Increased focus on cost of production traits, within future research programs.
- The implementation of other recommendations specific to beef breeding including; (i) implementation of genomics (including the undertaking relevant R&D), (ii) updating the SBV, (iii) new indexes for selecting maternal replacements and dairy-beef, (iv) establishment of a new herds focused on maternal traits, (v) establishment of a new beef bio-economic model and (vi) increased use of sexed semen in the dairy herd.

APPENDIX 2

Farm competitiveness

Delivery of health programmes for the major endemic, non-regulated diseases that affect Ireland's beef herd: BVD, IBR, JD

Bovine Viral Diarrhoea (BVD)

Following completion of a consultation process on a national, industry-led programme to eradicate BVD from the national herd AHI has now convened an Implementation Group, representing the key stakeholders in the industry, to design and implement a programme to commence in 2012. The role of AHI within the group is to facilitate discussions and to provide the technical support required to enable programme delivery. At the first meeting of that group, it was agreed that the programme should have the following broad characteristics:

Commencement date:	01/01/2012	
Duration:	Minimum possible	(provisionally 3-5 years)
Geographic scope:	Republic of Ireland	(maintaining close liaison with Northern Ireland)
Programme nature:	Voluntary in 2012, becoming compulsory from 2013	(depending on uptake)
Programme review:	No later than June 2012	
Diagnostic method:	Tissue test tag (primary)	

The Scottish government recently estimated the benefit (discounted economic surplus) of BVD eradication to that country at £47m. Preliminary results from a cost/benefit analysis, commissioned by AHI, indicate that the benefit to the Irish suckler herd of BVD eradication ranges from €29 (herd sizes from 51 cows upwards) to €38 (herd sizes up to 50 cows) per cow per year. The benefit of eradication to beef finisher herds is estimated at €19/head/year. The figures on the cost side are currently being computed and should be available by the end of this month.

BVD: Enabling Actions required	**Stakeholder responsible**	**Proposed timescale** End dates (unless otherwis indicated)
Establish Key Performance Indicators and review mechanisms	BVD Implementation Group	2011
Approval of a tissue test-enabled national identifier tag	DAFF	2011 (June)
Build and test database	ICBF; AHI; BVD Implementation Group; Private labs	2011
Establish capacity and accreditation of diagnostic laboratories	BVD Implementation Group; AHI; DAFF VLS; Private labs	2011
Establish farmer authorisation and data transfer protocols	BVD Implementation Group; ICBF	2011
Establish tag and sample delivery systems	BVD Implementation Group; Tag supplier(s)	2011
Develop and roll out national awareness and education campaign	BVD Implementation Group	2011
Develop protocols to facilitate trade in virus negative animals	BVD Implementation Group	2011
Develop protocols for disposal of virus positive animals	BVD Implementation Group	2011
Establish protocols for herds already controlling BVD	BVD Implementation Group	2011
Establish timescale for withdrawal of vaccination	BVD Implementation Group	2011
Implement voluntary disease control phase	BVD Implementation Group	2011-2012
Promote and introduce legislation to prohibit sale of virus positive animals	BVD Implementation Group; DAFF	2012
Implement compulsory disease control phase	BVD Implementation Group	2012-2015
Research and development (strain typing, etc.)	BVD Implementation Group; DAFF VLS	2011-2016
Implement programme surveillance phase	BVD Implementation Group	2015-2016

Infectious Bovine Rhinotracheitis (IBR)
The impact of IBR on the productivity and profitability of Irish beef farms, although currently poorly quantified, is likely to be significant. Equally significant is the loss of genetic potential that arises year on year as a result of the fact that IBR seropositive bulls (including those vaccinated) are ineligible to enter approved semen collection centres.

IBR: Enabling Actions required	**Stakeholder responsible**	**Proposed timescale** End dates (unless otherwise indicated)
Implementation of an awareness and education campaign	AHI; AHI Stakeholders	2012
Analysis of the economic impact of IBR at herd and national level	AHI; AHI Stakeholders	2012
Assessment of the case for a national IBR control programme	AHI; AHI Stakeholders	2013

Johne's Disease (JD) or Paratuberculosis
Although generally thought of as an issue for the dairy industry, Johne's Disease also has implications for the beef industry. The disease has a direct economic impact at producer level, while at industry level the possibility of an eventual linkage to Crohn's Disease in humans (see below) is a risk which is currently not mitigated by the industry. Paratuberculosis is a chronic infection caused by *Mycobacterium avium* subsp. *Paratuberculosis* (MAP) in cattle and other ruminants. Herds importing cattle and which introduce bulls are particularly exposed to risk. MAP infection in cattle is often given attention due to its possible connection to Crohn's disease (CD) in humans. Patients with CD experience chronic weight loss, diarrhoea and chronic pain throughout their lives. There is contradictory evidence that either support or dispute the association between MAP and CD. Human exposure to MAP from livestock could be via milk and meat products. Studies carried out in slaughterhouses have reported prevalence of 16% and 1% in Danish dairy and non-dairy cattle, respectively, 16% in culled dairy cattle in North America, and 34% in cull cows in the US. Another study has provided evidence to support the hypothesis that MAP is present in everyday meat products sold to the general public.

JD: Enabling actions required	**Stakeholder responsible**	**Proposed timescale** End dates (unless otherwise
Implementation of an awareness and education campaign	AHI; AHI Stakeholders	2012 (Q1)
Conduct modelling exercise to assist development of cost-effective control strategies	AHI	2011
Conduct research to support the development of appropriate and cost-effective risk control and risk management strategies	AHI; AHI Stakeholders; DAFF VLS	2011-2012
Develop risk control strategies	AHI; AHI Stakeholders	2011
Develop risk assessment strategies	AHI; AHI Stakeholders	2011
Develop programmes to enable industry-led implementation control of the disease	AHI; AHI Stakeholders	Present-2020
Establish mechanisms to enable sharing of TB test data with a future JD database.	AHI; DAFF; ICBF	2011

Technology and knowledge transfer		
Tissue test tag The use of a modified version of the national identity tag will be an essential component of any future BVD eradication programme in Ireland. The approval by DAFF of a modified version of the national bovine ID tag with tissue test capability is therefore a key action to be undertaken in 2011.	DAFM	2011 (Q3)
Animal health database AHI has been working closely with ICBF to develop an animal health database that will allow for the capture of animal health information from farms, diagnostic laboratories, slaughter premises, and other sources. This system will be a vital component of any future disease control programmes, including those for BVD, IBR and JD. A further application of this system, currently being explored by AHI, DAFF and a number of beef processors, is to capture information on certain production diseases (esp. liver fluke) at the veterinary inspection points in slaughter premises and to feed this information back to suppliers (with appropriate advice) and their local vets. Linkage of the database for non-regulated diseases to other surveillance databases places Ireland in a strong position to corroborate the quality, safety and wholesomeness of our food products.	ICBF; DAFM; AHI; Beef processors; MII; Farm organisations	2011-2012
Brucellosis samples Explore mechanisms to enable Brucellosis samples to be made available for other disease control and eradication programmes, such as that for JD.	DAFF; DAFM VLS; AHI	2012
Economic Working Group Establish a Working Group on animal disease economics to improve our understanding of the costs and benefits of disease control.	AHI; Teagasc; DAFM; CSO	2011

APPENDIX 3

Technology Adoption Programme 2011

Discussion Document

A. ADMINISTRATION OF PROGRAMME

1. The Programme would be implemented over a period of three years, with the possibility of extending it following a review of its operations after year 2.

2. It would be managed by the Department of Agriculture, Fisheries and Food, and run with the assistance of discussion group facilitators trained by Teagasc to a FETAC-accredited standard.

3. The Programme would be open to existing members of discussion groups and to those wishing to join or form groups for the first time.

4. A maximum of 20 members per discussion group would be recommended, although facilitators could exercise discretion in this regard where no diminution in the effective functioning of the group was anticipated.

B. ELIGIBILITY CRITERIA

5. Farms with suckler cows must be current successful participant in the AWRBS and be signed up to ICBF Herdplus prior to applying for Technology Adoption Programme.

6. Beef farmers without a suckler herd must be signed up to ICBF Herdplus prior to applying for the Technology Adoption Programme

7. Dry stock herd owners who are participants in DEP can opt for either the TAP or the DEP but not both

C. PROGRAMME CONTENT

8. All discussion groups whose members are in receipt of support under the Technology Adoption Programme are required to focus on the adoption of best practice in four key areas, namely, grassland management, breeding, financial management and herd health.

9. Discussion groups normally meet at regular intervals depending on time of year to consider these key topics. Programme participants are required to attend at least six meetings per annum. They are also required to host at least one group meeting over the period of the Programme as requested by the facilitator. It is expected that meetings would be held at intervals of four to six weeks apart so participants could generally be offered eight meetings per annum from which they would be required to attend six per annum. Each year, one national or regional event" to be determined, may be deemed the equivalent of a discussion group meeting (e.g., Teagasc National Beef Conference, Teagasc Grange Open Day, other approved regional event).

10. In order to optimise the benefits to applicants, participants will be required to complete a Three -Year Plan, similar to that detailed in Table 1, to focus on the adoption of best practice in four key areas, namely, grassland management, breeding, herd health and financial management. The 3 year plan must be completed by the end of 2012.

11. For 2011 participants must attend a programme orientation meeting at regional or county level and also must attend at least 2 discussion group meetings /qualifying events. 60% of the possible annual payment will be made on the basis of meeting these criteria.

12. For each year of the programme (including 2011) where a participant completes any of the following five tasks they will also receive a further 20% payment for each successful task up to a maximum of two per annum:

Task 1
Complete a Teagasc Profit Monitor or equivalent for the previous production year on the participants' own farm, a record which must be verified by the facilitator.

Task 2
Provide on farm certified weights to ICBF as specified by them (verified by ICBF)

Task 3
Provide proof of active involvement in a producer / processor partnership (verified by processor)

Task 4
Use AI sires – (verified by ICBF) for either of following:

a) At least 50 % of beef cows inseminated to AI

Or

b) Participate in Gene Ireland Programme

Task 5
Complete a Herd Health Plan certified by veterinary surgeon

TABLE 1: Example of Dry stock Three Year Plan to be completed by Programme participants:

Teagasc 3 Year – Farm Plan Template

Farmer Name:_____ **Adviser:_____**

Farm Plan Summary **Date: _____**

Measure	**Current 2011**	**Target 2013**
PHYSICAL SYSTEM		
Stocking rate (LU/ha)		
Land base (adj. ha)		
Cows calving		
Calving spread - Spring		
- Autumn		
Purchases		
Trading system (weanling, store, finish, etc):		
Male progeny - Spring-born		
- Autumn-born		
Female progeny - Spring-born		
- Autumn-born		
Liveweight output (kg / ha)		
FINANCIAL SYSTEM		
Output value (€/ha		
Variable costs (% of output)		
Gross margin (€/ha)		

Farm plan detail

Key Areas	Target/ Actions Needed
Grassland Management: (paddocks, turnout dates, housing dates, silage conserved, etc.)	
Breeding Performance: (Stock quality, replacement strategy, calving spread, etc.)	
Financial Performance: (Variable & fixed costs, cashflow)	
Other **Physical Performance:** (Stocking Rate, kg lw/ha etc.) **Health Issues:** (need for health plan, screening etc.)	

Appendix 4

A compilation of beef sector benchmarks in 2011 to be used as a basis for measuring progress annually towards the attainment of the Beef Activation Groups' recommendations for the delivery of the Food Harvest Beef Sector 2020 Targets.

[The list of criteria set out below is indicative and can be complemented with other appropriate benchmarks.]

	Benchmark	**Progress**				
	2011	**2012**	**2013**	**2014**	**2015**	**2016**
Farm Level: No. Suckler cows No. Dairy cows Annual calf registrations (Beef, Dairy Breeds, etc.) Calving rate Calf mortality Rate of improvement in herd disease health status Profile of Suckler herd - ave no. cows/herd etc Farmer participation levels in various schemes (ICBF; Teagasc; DAFF; Profit monitor; weighing; etc.						
Processing Level: Annual cattle slaughterings by category type Annual conformation, fat scores results Ave. carcase weights/age at slaughter by category No. of prime cattle slaughtered over 30mts % of cattle attracting BQAS premium % cattle slaughtered in each month (seasonality index) No. factories remitting additional animal health/other info. to farmers						
Price: Report price by category/grade Irish price by comparison to EU average prices						
Market Profile: Volume and value of beef exports Distribution of exports to key markets Annual live exports, by category and destination						

Teagasc: No. of beef advisors No. Better Beef Farms No. Beef Technology Adoption Groups (Discussion Groups) Attendances at Technology Adoption Groups Attendances at Teagasc Open days No. of Profit Monitor Farms Gross Margin – Better Beef Farms/Profit Monitor Farms Performance of Derrypatrick herd						
Department of Agriculture, Marine & Food Maintenance of SCWS CAP Post-2013: Coupled support for suckler herd Progress on Market Access Review of Meat Inspection Services National herd – disease status Carcase classification – monitoring & calibration						
Bord Bia: Brand Ireland development PGI status for Irish beef Market/Customer profile for Irish - Premiumisation BQAS participation levels Roll-out of carbon footprint initiative						
ICBF: New Beef Breeding Index Calving rate improvemeent No.of high index bulls involved in G€N€ IR€LAND Level of weight recording on Irish beef farms. Progress on Genomics Project No. of HerdPlus participants						
AHI: BVD Progress IBR Progress						