

2025 Agri-Food Strategy Public Consultation Questionnaire

1. Has Food Harvest 2020 delivered on its vision for the Agri-Food* Sector in Ireland?

Questions:

- a. Are we on course to deliver on the strategy envisaged in Food Harvest 2020?

Animal Health Ireland (AHI) programmes are specifically referenced under Milestones 39, 40 and 41 of FH2020, which refer to the programmes for the eradication of BVD, the control of Johnne's disease and the control of dairy cow mastitis (*CellCheck*), respectively. In each case, AHI is confident that the published objectives for these programmes can be achieved within the timeframes established, subject to the continuing support of our partner organisations in industry and government.

- b. ? How can the strategy for the agri-food sector be improved for the next decade

AHI believes that there should be an increasing focus on product quality to support the acquisition of new, and retention of existing, markets for value-added food products, such as infant formula preparations and high-value beef cuts. In our view, animal health is a key determinant of product quality and a key component of sustainability. The agri-food strategy for 2025 should ensure that Ireland's animal health status forms an integral component of Ireland's unique selling proposition and that we put in place objectively verifiable performance indicators to substantiate the health claims which underpin our brands.

The 2025 agri-food strategy committee should also consider how it might enhance the communication of the 2025 strategy so as to build awareness of the contribution made by all actors (farmers, processors, State Bodies, non-statutory agencies, and government) to the achievement of targets and to increase the sense of agency of each of these actors.

- c. Are there emerging market opportunities that should be considered as part of a new strategy for the sector to 2025?
- d. What should be the scale of our ambition for the sector?

Ireland has developed an infrastructure, which if properly leveraged, can place us in the first rank of countries worldwide in terms of our animal health status. Some of the components of this infrastructure include our robust animal identification and traceability systems, the publicly-owned ICBF database, the well-developed discussion group model which supports knowledge transfer, the policy expertise within the Department of Agriculture in relation to the control of statutory animal disease, and the existence of a public-private collaborative model (AHI) to address economically important endemic disease. The BVD programme, which has been designed around the collection of diagnostic samples by the farmer using a modified official ID tag and the ability of the ICBF, AIMS and AHCS databases to identify, locate and restrict the movement of infected animals, is a good example of how existing infrastructure can be leveraged to establish an animal health programme in a relatively short time. The AHI *Beef HealthCheck* programme, which involves the capture of health information from abattoirs, its storage and analysis in a centralised database (ICBF) and the individualised communication of the results of the analysis to farmers and vets is a further good example of how such potential can be harnessed.

2. Sustainability / Climate Change

We recognise that the development of the agri-food sector must take place in an environmentally sustainable manner. As an export driven food producer, the sustainability of Ireland's production systems is a critical point of differentiation for our food and drink produce on international markets. As food production increases in the coming years, we will face challenges in meeting EU and national environmental targets on climate change, biodiversity, air and water quality etc.

Questions:

- a. How can Ireland build on existing policies and standards to promote more sustainable agriculture, forestry and fisheries and to meet our national, EU and international commitments in these areas? How do we reconcile these actions with the need to optimise food production, economic growth and job creation?

The points made in our response to 1(d) are relevant here also. In addition, AHI would wish to see its formal inclusion (together with ICBF) in the committees and structures underpinning the on-going development of the Bord Bia quality assurance schemes for dairy (SDAS) and beef animals (BLQAS).

- b. In the context of the development of the agri-food sector to 2025, what specific actions should be taken by farmers/fishermen, processors and the State on:
 - Greenhouse gas emissions and sequestration
 - Air, water and soil quality
 - Biodiversity
 - Bioenergy development
 - Sustainable fisheries and aquaculture

As an immediate priority, Teagasc should incorporate into the next iteration of the Marginal Abatement Cost Curve (MACC) model the impact of improved animal health on GHG emissions from livestock, particularly cattle. Such a study would add considerably to our ability to quantify the extent to which animal health measures can contribute to GHG abatement.

While the contribution to the sustainability of Ireland's livestock sector of improved nutrition and breeding is well recognised and supported by the infrastructure and resources of organisations such as Teagasc and ICBF, the role of animal health in this regard has yet to be fully recognised. Good animal health has a positive impact on the key components of sustainability: the economic (through improved farm profitability), the ethical (through improved animal welfare and the contribution to addressing the problem of antimicrobial resistance), and the environmental (by contributing to GHG abatement). While DAFM has established effective control, eradication and surveillance programmes for the regulated diseases of livestock, further resources should be made available to addressing endemic diseases, which are not subject to international regulation and control, but which have a consistent negative impact on the sustainability of livestock production.

3. Global market context including opportunities for FDI

As an export dependent country, Ireland must continuously focus on developing relationships in new and expanding markets, building our reputation internationally and enhancing international consumer confidence in Irish production and control systems.

Questions:

- a. What major changes/challenges are likely to emerge in the global market for food and drink in the period to 2025?

From an animal health perspective, AHI would identify the following global challenges:

- Addressing consumer concerns regarding the contribution made by antimicrobials used in animal production systems to the problem of antimicrobial resistance
- Addressing consumer concerns regarding the health and welfare of animals kept for food production
- Managing the biosecurity risks associated with the expansion of the global livestock population to meet global demand for livestock produce
- Managing the environmental risks associated with the expansion of the global livestock population
- Ensuring that moderate scale but sustainable livestock production systems are not placed at a competitive disadvantage relative to large-scale, unsustainable systems

- b. How could Ireland be better placed to compete in the global market over the next decade?

By addressing the issues identified above and providing objectively verifiable indicators to underpin the claims we make in relation to the health of our livestock, the sustainability of our livestock production systems and the quality of our livestock produce.

- c. Should Ireland seek to better identify and target high value niche markets, and if so how?
- d. Should we encourage increased international investment (FDI, Joint Ventures) in our agri-food industry and/or develop strategic alliances with partners in rapidly growing markets?

4. Competitiveness & innovation

Ireland's agri-food sector primarily competes on the international food market and the ability to maintain our competitive advantage based on our low cost, grass based production systems is paramount. While the overall performance of Irish food and drink exports over the last few years has been very strong, we must build on our existing reputation as a supplier of quality food and drink produce and develop new, higher value products to market internationally if we are to realise the full potential of the sector.

Questions:

- a. What can be done to improve the competitiveness of the agri-food sector over the next decade? Are there examples of best practice from abroad that could be adopted in Ireland?

Ireland needs to intensify its focus on ensuring that the quality of its livestock produce meets and exceeds the demands of our customers. The economic analysis underpinning the AHI programmes demonstrates that improved animal health results in improved profitability at the producers and processor level and improved competitiveness in the international marketplace.

- b. What measures should be adopted at farm level to improve competitiveness?

Adoption of best practice should be encouraged through all means at our disposal, including peer-learning and peer-pressure, awareness-raising, technology, price signals, and (where appropriate) regulation.

- c. What measures should be adopted at industry level to improve competitiveness?

Further consideration should be given as to how to improve the ability of the processing sector to reward, through the price mechanism and otherwise, the achievement of high quality production at producer level.

Existing mechanisms should be leveraged, and new mechanisms found, to encourage collaboration between the various actors in the value chain in the resolution of collective problems.

- d. What emerging / existing technologies might significantly impact on the agri-food sector in the years ahead?

AHI, together with ICBF and Teagasc are involved in research ('Healthy Genes' project), aimed at exploring the extent to which genetic selection for 'robustness' in the face of disease challenges can play a role in improving the health status of livestock in Ireland. In parallel, AHI and ICBF are working together to develop infrastructure (e.g. the AHI *Beef HealthCheck* programme) to support the capture of phenotypic data to support such analysis.

The increasing sophistication and ready availability of smart phone technology and mobile apps provides a platform which can be leveraged to enable the capture and uploading in real time to a centralised database (ICBF) of health events, such as the prescription and administration by vets and farmers of animal remedies. This reduces the administrative burden of compliance with the requirements of legislation and quality assurance programmes. Furthermore, the same technology enables the drawing down from the centralised database of tailored, relevant information to support improved decision-making on animal health issues by vets and farmers.

- e. How can we maximise job creation within a competitive agri-food sector over the next ten years?
- f. What areas should we prioritise to encourage increased innovation in the agri-food sector?

5. Risks

Our high regulatory standards in the areas of food safety and traceability underpin our reputation as a producer of high quality food and drink, providing reassurance to consumers abroad and serve as a source of competitive advantage. But the high level of exposure of our agri-food industry to a range of volatile external elements, means that we must focus on key risk factors and adopt measures to mitigate these risks. These risks range from increasing volatility on international commodity markets, currency risks, and geopolitical insecurity causing trade disruption to major food safety incidents which have generated concern amongst consumers internationally.

Questions:

- a. What do you consider the most critical risks facing the Irish agri-food sector and rank in order (1=highest risk, etc)?

In addition, to the risks identified in our response under 3(a), AHI would identify the following risks to the Irish agri-food sector:

- **Intensified scrutiny of our quality claims by international competitors whose produce is displaced, or threatened with displacement, by Irish exports.**
- b. What measures should be taken to mitigate or better manage potential market and economic risks?

Ireland should ensure that an appropriate mix of public and private resources are brought to bear in the mitigation of the key animal health risks which have been identified, or which may emerge in the future. In this regard, AHI would welcome the development of a policy framework to support an appropriate sharing of the costs of animal health programmes between the relevant actors in the value chain.

As an understanding of the economics of animal health and disease is critical to establishing the rationale for animal health programmes and to encouraging engagement by the actors involved in their delivery, AHI is of the view that a standing capacity to conduct such analysis should be established in this country.

- c. How can we best manage risks to food safety, animal and plant health?

Our responses under 1(d), 2 (a), 2(b), 3(b), 4(b), 4(c), 4(d) and 5(b) are relevant here.

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