



Department of
**Agriculture,
Food and the Marine**

An Roinn
**Talmhaíochta,
Bia agus Mara**



Food
Harvest | **2020**

Milestones for Success 2012



1. Context

This report, which spans the years 2011 and 2012, illustrates a confident and ambitious sector which has achieved growth while operating in a challenging global economy.

In 2011, the agri-food and fishing sector excelled and continued to be one of the cornerstones of the export-led national economic recovery. The value of its exports was €8.84 billion, a 12% increase on the previous year and significantly higher than the target of €8.5 billion set in the first 'Milestones for Success' report. Higher global commodity food prices contributed to this increased value but volume growth was also achieved in key categories such as dairy, beverages and pigmeat. Overall this sector accounted for 25% of the total growth in export revenue in 2011.

At farm level, 2011 was also a very good year with average farm incomes of over €24,800, a 32% increase on 2010. This increase was entirely driven by market returns and meant that the proportion of economically viable farms increased by 7%. The improvement in farm income reduced the debt to income ratio to 1:3 and the increased level of investment at farm level was a real indicator of confidence in the future.

In summary, 2011 was exemplified by confidence and investment with a strong focus on improving efficiency and price competitiveness to drive future growth. Outcomes achieved included improved employment figures, market diversification, significant herd rebuilding and a building up of capacity by dairy producers. These factors, plus steps taken to increase capability at all levels, will help the sector respond effectively to the continuing difficult and volatile global environment.

There are indications of a slower growth in global economies in 2012. This has implications for this globally trading sector. While commodity prices will remain relatively high, from an historical perspective, they will not reach the peaks recorded in 2011. Currency fluctuations and market volatility are also a continuing reality, and while a weak euro benefits exports, it also increases input costs. Volatility is a fact of life for this indigenous sector. Farmers and industry are very aware of this reality and recognise that they must be resilient in the face of pressure while also continually striving to achieve progress.

The Food Harvest High Level Implementation Committee (HLIC) continued to coordinate the state response and met on 6 separate occasions in the last year under my chairmanship. Continuing close engagement with industry, specifically with beef, dairy, consumer food, alcoholic beverages, pigmeat and horticulture stakeholders, has ensured sustained industry commitment and involvement with its work, vision and targets. The HLIC has also worked strategically to align economic recovery with job creation by inputting into the Government's 2012 Action Plan for Jobs.

I believe that the continuing progress made to date has heightened awareness of the intrinsic high value of the agri-food and fisheries sector to the national economy and that policy makers now have more confidence in its ability to contribute to national development.

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

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Trade

International trade is the lifeblood of the agri-food and fishing industries. Securing and enhancing access to high growth export markets is a major focus for the Department and its state agencies. To more effectively direct these efforts, a stronger inter-agency Trade Team was established in 2011 and their collaboration contributed, in no small way, to the very successful outcomes achieved on the China and US trade visits.

Policy negotiations are directed at shaping international and EU policy direction so that the Irish supply base can develop and thrive. Significant work is done at official and political level to continually promote our high food safety and veterinary standards, identify market opportunities and prioritise those areas which best match and maximise our export potential.

Over the past two years, there has been a renewed emphasis on continental EU markets and on securing access to more third country outlets, particularly Asia and Africa.

Ministerial visits were made to Algeria, China and the US to advance access issues and develop trade links and networks. Ireland also hosted delegations from trading partners such as India, Morocco, Israel, Philippines, Australia, China, India, Saudi Arabia and Korea.

Trade achievements in the past year included improved market access for beef to Tunisia, Morocco, Turkey, Egypt, Singapore and for pork to Russia and China. This strategic engagement with trading stakeholders maintains the presence of Irish food and drink exports in around 170 countries and contributed to the agri-food exports of €8.84 billion in 2011.

A new area of focus for the HLIC is to leverage commercial advantage from our reputation as a provider of high quality agri-services. The range of services which could be provided includes our expertise on food safety, animal health, traceability or research. The HLIC has established an inter-agency expert group to examine the possibility of establishing a vehicle that would internationally market these services and to report back to them on their findings.

Employment

One of the employment goals in Food Harvest 2020 is to leverage the growth achieved on output and exports so as to protect existing jobs and to create new ones. When FH2020 was published in 2010, it was realised that action was needed to stem the previous decade's net job losses of around 1,500 and also to support direct employment creation, particularly in food and aquaculture production. At that time, it was estimated that between 7,000-7,500 additional new jobs was a realistic figure.

Some success has been achieved on this front. Based on their national household survey, the CSO estimates for food and beverage manufacturing show a welcome rise in employment levels, which have moved up from 43,900 in Q1 2010, 46,000 in Q1 2011 to 50,300 in Q1 2012. In addition, there is evidence that some areas of employment may not be fully represented by this survey. A case in point is the fishing and aquaculture sector where official estimate for Q1 2012 point to around 1,700 jobs in this area, while primary data from actual client surveys and fishing registers maintained by BIM show that over 6,500 full and part time persons are directly employed on fisheries and aquaculture, frequently in small scale enterprises.

Besides the higher direct employment levels which will result from increased activity in the agriculture and fishing sector, studies have been conducted which demonstrate that these sectors also generate significant additional indirect employment, particularly in rural economies. BIM studies in 2009 and 2010 on Killybegs and Castlebere show that the employment multiplier resulting from direct fishing activity ranged from 0.66 in Castletownbere to 1.72 in Killybegs, while their overall data for 2010 indicates that full and part time fishermen and aquaculture producers contribute to a further 4,070 jobs in processing and ancillary activity.

In 2011, The HLIC established a working group to examine this issue. This group recently completed their assessment on the potential employment impacts, direct and indirect, which could arise from achieving the Food Harvest 2020 growth targets. Using a social accounting matrix model, their analysis predicted that 24,719 additional direct and indirect jobs could realistically be generated up to 2020 from this increased activity.

The agri-food sector was an integral element of the Government's 2012 Action Plan for Jobs (APJ) and delivering on these job focused commitments was core to the work of the Food Harvest implementation committee. The 17 inter-agency projects ranged from direct employment generation measures to actions to support and improve employment potential at primary and processing level. Initiatives include work on a large scale offshore aquaculture project, Food Works, Marketplace 2012, graduate fellowships involving international commercial assignments and SME supports including research, finance, incubation spaces, mentoring and discussion groups.

2. Overview of Progress

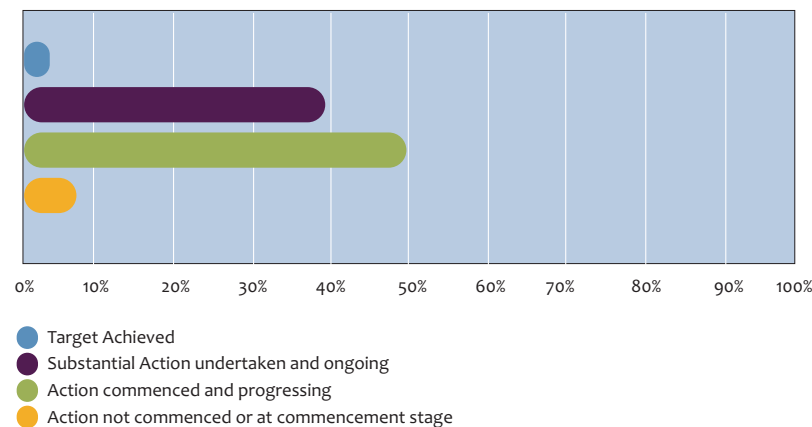
Acting Smart

Active Implementation

Delivery of Food Harvest 2020 is underpinned by action in relation to over 200 recommendations on a broad range of issues. These are being implemented on an ongoing basis and details are contained in the attached link,

<http://www.agriculture.gov.ie/media/migration/publications/2012/FH2020230812.pdf>

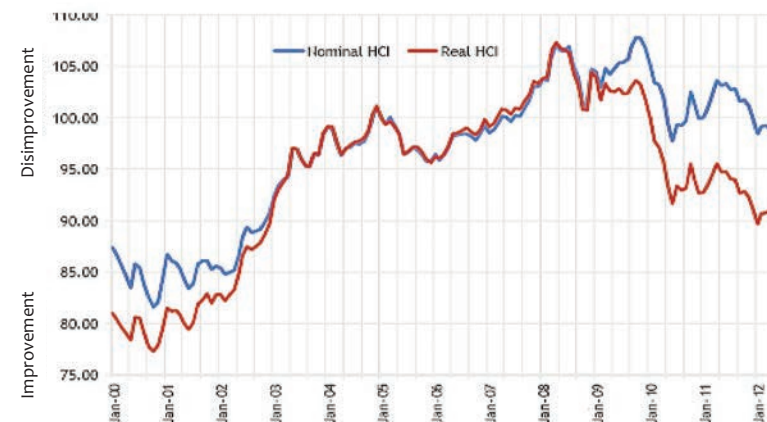
A summary assessment of the overall position on the 215 recommendation is illustrated by the diagram beneath, which shows that substantial action taken on 40% of the recommendations, with a further 50% being progressed.



Summary Progress on FH 2020 Recommendations

Competitiveness

Improved competitiveness is one of the key factors affecting growth in this globally trading industry. The most recent data produced by Forfas shows that Ireland's Real Harmonised Competitiveness Indicators (HCI) improved by almost 15.25 % between April 2008 and April 2012; see chart below. This is a welcome improvement in competitiveness, but as indicated by Forfas, this improvement has been assisted by falls in relative prices and favourable exchange rate movement, rather than by effecting the more difficult structural reforms required.



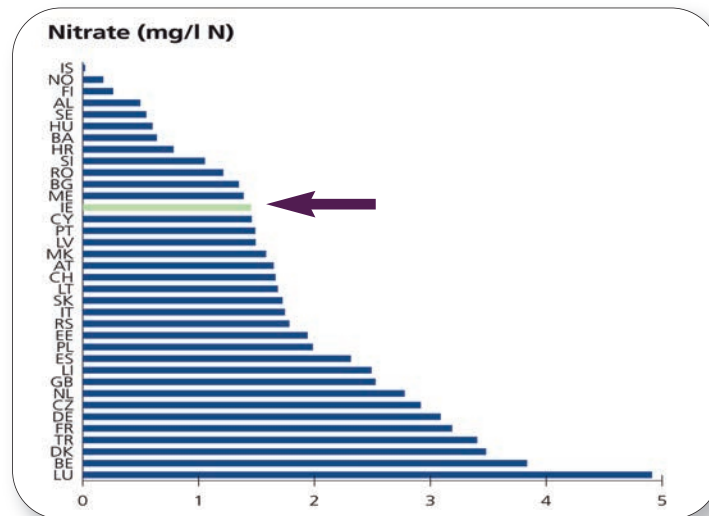
Ireland's Real Harmonised Competitiveness Index 2000-2012 (100=2005)

Thinking Green

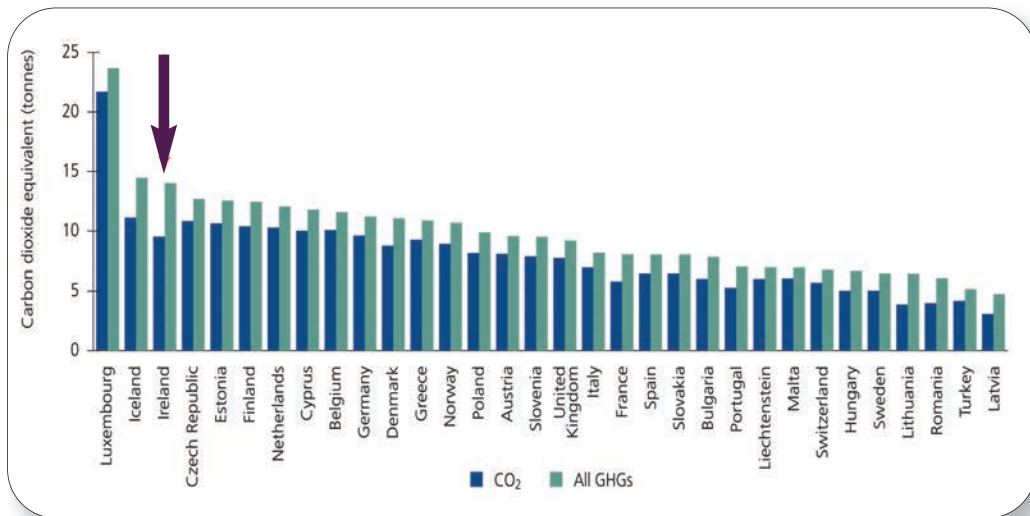
Environmental Sustainability

The 2012 EPA assessment on Ireland's environment shows that overall Ireland's environment is generally good. Nevertheless the country faces tough challenges over the coming years to protect this national resource and to meet statutory commitments on areas such as water, emissions and air quality. Ireland's water quality ranks in the top third of 30 European countries, our air quality is also in the top echelon but despite the GHG efficiency per unit of output of our main production systems, our aggregate GHG emissions per person are among the highest in Europe, see graphs beneath.

One of the strategic priorities of Food Harvest 2020 is to enhance environmental sustainability and to develop strategies which help reduce the carbon intensity of agriculture and fisheries. One of the necessary steps taken has been to commission a detailed environmental analysis which is examining various alternative scenarios on how the FH2020 growth targets can be achieved and will also make an assessment of their likely environmental impact.



Comparison of River Water Quality (Nitrates) with 30 other European Countries- Source EEA, 2012)



Comparison of GHG and CO₂ Emissions with 30 other European Countries, Source EEA, 2012

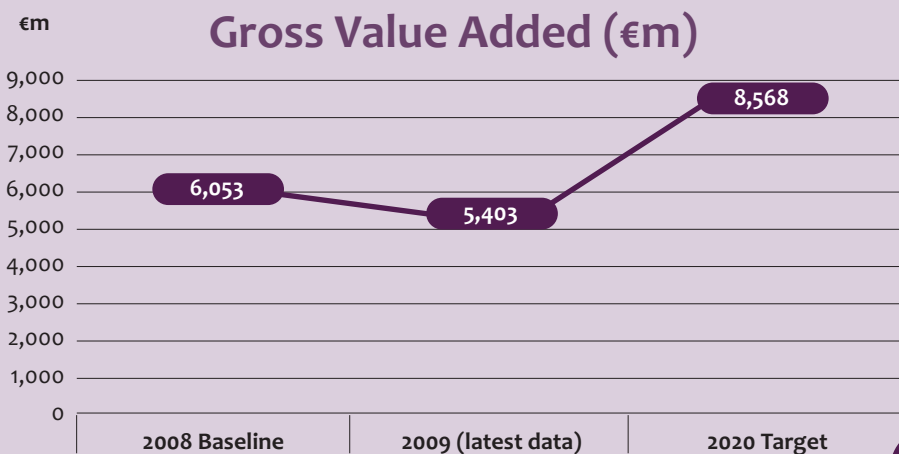
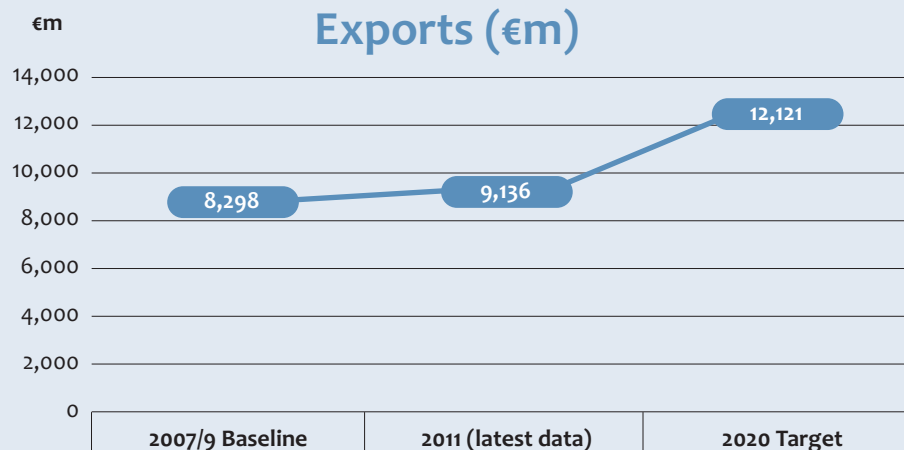
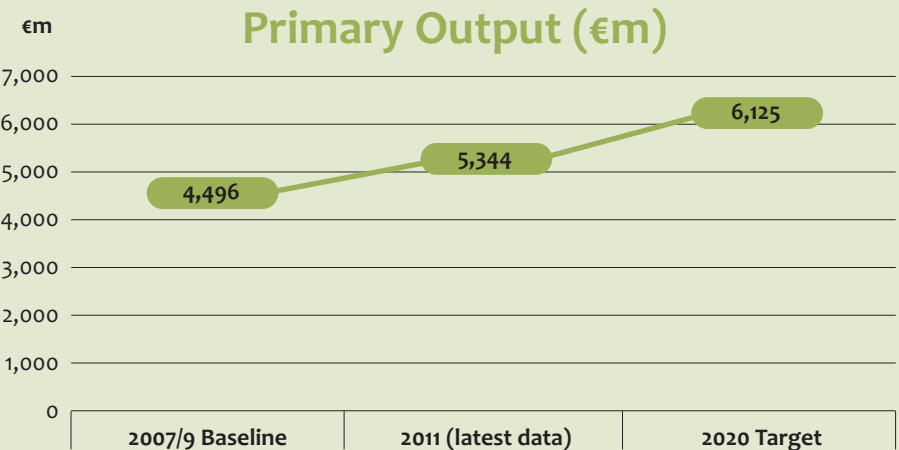
Achieving Growth

The Food Harvest 2020 report sets 3 main targets to achieve by 2020

- a 33% increase in the value of primary agriculture by increasing its value from €4,496 million to €6,125 million,
- an export target of €12billion from the 2007-2009 baseline figure of €8,298 million
- a 40% increase in value-added from the estimated 2008 baseline.

The charts show the trend to date for these three parameters. The value of both primary agriculture and exports show a positive upward trend and have increased by 19% and 10% respectively on the 2007-2009 baseline.

It is not possible to have an accurate assessment of the change in value-added as this data is significantly in arrears. The 2009 data produced in July 2011, revised the estimated 2008 figures down from €7,879 million (its previous estimate) to €6,053 million. The figures for 2010 will not be available until later in 2012. While the estimated 2008 baseline has been revised, the target of a 40% increase from the 2008 baseline remains valid.



3. 2012 Highlights

Market Development

The trade mission to China in April 2012 led by Minister Coveney was organised by DAFM in conjunction with Bord Bia, Enterprise Ireland and Teagasc. It was an excellent example of practical and effective collaboration between State and industry. It comprised over 50 companies and, uniquely, involved five separate trade programmes for dairy, meat, seafood, bloodstock and agri-services.

This very successful visit had significant business and networking outcomes. Memoranda of Understanding (MOU) were signed on sanitary and phyto-sanitary issues, fisheries research and mutual cooperation in the agri-food and fisheries areas. The latter included the setting up of a Joint Working Group on market access for Irish beef, the first of its kind in Europe. Commercial outcomes were achieved on dairy and nutritional ingredients, seafood products, machinery, sales of horses and a joint venture on a national equine facility as well as a demonstration farm.

Overall, this visit, together with the earlier visit to Ireland of Vice President Xi Jinping, has raised the profile of Ireland as a major producer of high quality food and as a centre of excellence for food safety, animal breeding and genetics.

The trade mission to China was followed by a trade and investment promotion visit to the United States. A series of meetings with political, industry leaders and the diaspora highlighted particularly positive opportunities for the Irish meat, drink and dairy sectors.

Origin Green

Extensive trade research by Bord Bia indicates very clearly that global retailers regard sustainability as a key growth driver. Bord Bia recently launched a new '**Origin Green**' programme to facilitate continuous improvements in the sustainability credentials of Ireland's food companies and to advance our reputation as a source of high quality, sustainably produced food and drink.

The overall direction of Origin Green is to provide a significant point of differentiation for the Irish food and drink industry around the area of sustainability. This will build on the successful greenhouse gas (GHG) emissions models already in use by beef and dairy farmers

The heart of this initiative is a voluntary sustainability charter for food and drink manufacturers. Working from a menu of mandatory and optional choices, participating companies commit to specific reduction targets on energy, emissions, waste, etc. These multi-annual action plans will be independently verified to demonstrate company's sustainability claims.

Nine major Irish companies – representing around 30% of total exports- piloted the sustainability charter and Origin Green was formally launched in June. Significant company interest has already registered and the goal is to have, by end 2014, 75% of Irish food and drink exports being supplied by companies which have publicly committed to rigorous sustainability targets.

Deep Sea Aquaculture Project

BIM, working with the Marine Institute, has taken significant steps to progress the development of a major off-shore aquaculture project, as signaled in Milestones for Success 2011. They have identified a potential location for this innovative undertaking, have scientifically assessed this site, prepared a full scale environment impact study and have submitted a formal aquaculture and companion foreshore licence application to the licensing authority.

Steps have also been taken to make sure that the project is 'shovel ready', if the licence application is successful. Extensive local and national consultations have taken place to promote awareness and acceptance of this novel project and 15 of the world's leading seafood and aquaculture companies have formally registered their interest as potential operators of the offshore aquaculture unit.

If licenced, this project has the potential to generate 15,000 tonnes of organic grade Irish salmon annually, to achieve exports of around €100 million and to directly employ 350 people with a further 150 jobs downstream.

Developing Entrepreneurs

2012 saw the launch of **Food Works**, a new food entrepreneur training and development programme to stimulate and fast track new food ventures with scalable export opportunity. Bord Bia, Enterprise Ireland and Teagasc have combined resources to find and foster global food entrepreneurs. Some 300 potential entrepreneurs attended the national '*Plan Your Path*' events. Following a detailed selection process, 29 of these are now being given, over an 8-week period, a suite of practical business services to develop their initial concept into a winning food product with international appeal. The supports include consumer market research, technical feasibility and business plan development. In November, up to 15 of these entrepreneurs will take the final steps needed to achieve investor-ready, stress tested business plans.

If successful, this initiative will be continued for a further period. This is expected to achieve around 45 entrepreneurs with global potential, together with a further cohort of ambitious and determined new food entrepreneurs who have benefited from their involvement in the process.

As well as Food Works, ongoing entrepreneurial supports, financial, innovation, new product development, mentoring, etc, continue to be provided by EI, the Teagasc SME Technology Support service, BIM Seafood Development Centre and Skillshare.

4. Achievements so far

- Teagasc, Enterprise Ireland and Bord Bia have collaborated to develop 'Food Works' an inter-agency mentoring and support programme to assist budding entrepreneurs develop their enterprises and products.
- 24 large and 37 SME companies participated in the EI Lean programme in 2011 with 11 further companies involved in 2012. Competitiveness savings of the order of €3.6million, on an ongoing annual basis, have been achieved under 'Lean Start' and 'Lean Plus'. Companies participating in 'Lean Transform' are typically reporting savings in the hundreds of thousands from their projects, many of which are ongoing.
- 46 companies availed of the BIM Seafood Development Centre facilities to deliver 19 new seafood products which, in 2011, achieved new sales valued at €7m.
- The successful buyer forum, Marketplace 2012, at which 176 Irish companies and 500 international buyers participated, has to date achieved sales contracts of €5m. The target is to exceed the sales contracts of €8m and €11m achieved in the two previous Marketplace events.
- Irish Dairy Board (IDB) and Teagasc have collaborated to establish a new Dairy Innovation Centre and to develop two new cheeses for commercial scale-up by IDB members.

- Bord Bia and FDI have created Skillshare where a panel of large industry players mentor small businesses in strategic development, account management and distribution. To date 20 large companies are mentoring 10 small companies.
- 20 projects, involving 115 businesses, participated in co-opetition discussion (where businesses compete in some areas and cooperate in others to secure new markets, larger contracts or reduce costs). 4 have been brought to a successful conclusion while a further 9 are in different stages of development.
- Three Irish beef suppliers are cooperating to supply premium product to a leading European retailer.
- The Seafood Route to Market Scheme assisted 6 companies grow their export business by collectively pooling resources and building scale to meet market needs.
- A new "China Food Hub", in Shanghai, involves Bord Bia and Irish beef, pork and seafood companies collaborating together and also supporting other Irish companies dealing with the Chinese market.
- A multinational food company has agreed to establish its global Centre for Digestive Health in Moorepark in collaboration with Teagasc and UCC.

Industry Acting Smart



4. Achievements so far

- The current Marketing Fellowship programme involves 25 graduates working on 100 commercial international assignments with a target of €10m in contracts. This is an increase on the €7.9m and €2.5m achieved in the previous programmes.
- Bord Bia launched the Ireland-China and Ireland-USA Food Networks to assist Irish food companies with market entry, contacts and strategies.
- The 2nd Leadership for Growth programme (L4G), involves 20 CEOs from the food sector, while 7 food Chief Financial Officers are involved in the CFO Strategic Leadership Programme. This high level of food company participation in these strategic capability initiatives will drive future growth.
- Over 75% of the highly qualified graduates from the 1st and 2nd Marketing Fellowship programmes were retained by the food industry.
- The Teagasc SME Technology Support programme has worked with 300 food companies providing research, commercial services and specialist analysis.
- Over 300 SMEs benefited from the EI Innovation Voucher scheme in 2011 and gained innovative solutions to technical or business challenges from the Higher Education Institutes involved.
- Improved Business to Business linkages were developed at the 4 Regional Food Showcases at which over 170 enterprises participated.
- Collaborative efforts between industry stakeholders and DAFM resulted in 'Food Research Ireland', the national industry orientated Strategic Research Agenda for food. This SRA influenced the topics in the Department's 2011 Research Call of €9.6m
- Applications for PGI designation for Waterford Bla and Irish Salmon were progressed.
- The national importance of the agri-food and marine sector was recognised in the 14 priority areas identified in the National Research Prioritisation Exercise.
- Teagasc launched its Food Technology and Knowledge Transfer Strategy to strengthen its engagement with food companies and its annual investment of €15 million on food research. This offers scientific solutions to the food industry using five gateways - technology and IP platforms, research updates to industry, pilot food plant facilities, product development and technological expertise and access to global scientific services.

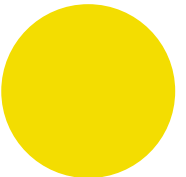


Industry Acting Smart

4. Achievements so far

- Significant progress has been made by BIM and the Marine Institute on a deep sea salmon development project. The offshore site has been selected, the environmental assessment completed and the licence application lodged. Well established commercial companies have registered their interest in operating the site, if the licence application is approved.
- Farmers participating in the Teagasc/Farmers Journal BETTER Beef Programme increased their gross margin by 118%, from €386 to €843 per hectare. 2/3 of this gain was due to improved technical performance and 1/3 due to a price lift.
- The number of collaborative farming arrangements has increased, including a rise of over 200 in registered farm partnerships from 2010. Around 450 farmers participated in the collaborative farming workshops held in 2012.
- ICBF have increased the quality of A.I. bulls available to farmers. On the dairy side, the 4.8% increase (97,000) in dairy calves and the 7.8% increase (28,000) in AI bred dairy replacements on 2010 numbers auger well for improved stocking rate and quality from 2013 onwards.
- To guide policy decision, a comprehensive modelling analysis was undertaken by DAFM on the impact of the various CAP single payment proposals.
- The National Open Day for the Greenfield Dairy Farm had over 1,000 attendees. In addition, half yearly figures show that six groups, involving over 300 individuals, visited the farm, in-service training day was held for dairy advisors and Greenfield weekly notes are sent to 130 people.
- AHI implemented a voluntary BVD programme involving over 20% of calves born in 2012.
- In 2011, Teagasc was involved with 12 collaborative European research projects valued at €56m, of which €3.6m relates to Teagasc.

- There has been a notable increase in participation in discussion groups, rising from 3,000 to over 11,500 in dairy, beef, sheep and tillage. The Beef and Dairy groups, funded by DAFM, play a major role in disseminating knowledge and effecting efficiencies.
- A Professional Diploma in Dairy Management, launched by Teagasc and UCD, includes 2 years work experience on dairy farms at home and abroad. Graduates will have the technical, financial and managerial skills to manage farms or enter share farming arrangements.
- Teagasc funded 39 new Walsh Fellowships in 2011, with 31 at PhD level and 8 at MSc level, bringing the total pool of specialist agri-food fellows to 168.
- External stakeholders contributed to the development of 'Stimulating Sustainable Agricultural Production through Research & Innovation (SSAPRI)', the Strategic Research Agendas for primary agricultural production.
- Guidelines for mastitis control were published by AHI and a national capacity building programme was initiated.
- Teagasc has collaborated with three dairy co-operatives and 7 commercial farmers to develop a broadly based technology and management programme to improve the profitability of dairy farms with heavy soils.
- The UCD –Teagasc Partnership has developed a national programme for agricultural research providing inter-agency synergies on graduate training, research and technology transfer programmes.
- Budget 2012 introduced significant stock relief and other fiscal incentives to encourage farm partnerships and farming as a career



4. Achievements so far



- DAFM has appointed independent external consultants to undertake an analysis and prepare a report on the likely environmental impacts which might result from the implementation of the Food Harvest 2020 targets. A report is expected by end October 2012.
- The 32,000 beef farmers in the Bord Bia Quality scheme are committed to actively measuring and reducing their greenhouse gas emissions. This is the only QA programme in the world which has an environmental element operating on a national basis.
- Having piloted “Origin Green” with a representative range of food and drink companies, Bord Bia launched a voluntary industry sustainability programme with specific actions to improve sustainability while increasing competitiveness.
- 200 fishing vessels (60% of national fleet capacity) are now part of the BIM’s Seafood Environmental Management System. These vessels are also pursuing full, 3rd party certification under BIM’s Responsibly Sourced Standard or MSC certification.
- The 2012 EPA assessment report’s overall finding is that Ireland’s environment is in a generally good condition. The challenge for *Food Harvest 2020* is to ensure that nutrient management practices will be sufficient to prevent environmental damage to water bodies and that significant new mitigation measures will be developed and implemented to reduce emissions of GHGs.
- Teagasc has installed a boiler capable of burning miscanthus and other feedstocks at Johnstown Castle and a CHP plant based on biomass in Oak Park. This demonstration facility is the first of its kind in Ireland. It also plans to develop an Anaerobic Digester plant at Grange including a grid connection.
- Accreditation to PAS 2050 standard has been achieved for a dairy enterprise greenhouse gas emissions model. Following on from the successful 2011 pilot programme, a national scheme, equivalent to that in the beef sector, will be implemented in 2012/2013.
- Teagasc, in conjunction with Bord Bia, have developed, tested and verified Carbon Navigator tools to assist farmer producers reduce their carbon footprint through production efficiency.
- 2nd phase of the Agricultural Catchments Programme started in 2012 to evaluate the efficacy of environmental legislation in river catchments of 500 to 2,900ha.
- An improved aquaculture licensing system was introduced in compliance with EU Directives.
- The 43 Farmers Markets participating in the voluntary Good Practice Standard are committed to stocking a substantial proportion, ideally 50%, of produce from the county or neighbouring counties and to accommodating seasonal and local produce.
- National Organic Week 2011 focused on increasing domestic consumer awareness of and consumption of organic foods while 16 companies participated in Biofach, the major European organic fair, to enhance the international profile of Irish organic produce.
- Teagasc’s submission on the climate change bill outlined the available emissions reductions strategies and identified a further range of approaches to reducing GHG emissions, including increased productivity, extended grazing and nitrogen efficiency.
- Ireland is a founder member of the Global Research Alliance on Greenhouse Gases and is represented on its governing body.
- Ireland (Teagasc and DAFM) is a significant research partner in a new FAO initiative to develop methodologies to benchmark the environmental performance of livestock production systems.
- DAFM financially supports the Burren Farming for Conservation Programme, a high value environmental programme which preserves the biodiversity, water quality and the 13,000 hectares of Burren karst landscape and flora.

4. Achievements so far

- Food and drink exports increased to €8.84 billion in 2011, with total agri-food exports reaching €9.13 billion.
- Over the past two years, employment in the total agri-food and fishing sector has increased by 4% including an increase from 43,900 to 50,300 on food and drink manufacturing, more than reversing the employment loss in the previous decade.
- The average income for commercial full-time farms, of which there are about 30,000, was €56,413 in 2011, up 31% on 2010.
- A leading global infant milk producer, supported by EI, announced a €20 million investment at its Irish plant, doubling the capacity of the facility to 70,000 tonnes.
- A report published by DAFM highlights that the overall biosector contributes 40% of net foreign earning from merchandise exports due to lower import requirements.
- The seafood sector is performing strongly with exports growing by 10% year on year. Since 2010, a group of key seafood companies working with BIM have generated additional revenues of €57 million and have created 127 new jobs.
- Investments in the region of €500 million over 10 years are planned by drinks companies to meet the growth targets in Food Harvest 2020.
- Further research by ICBF & Teagasc has led to increased usage of genomic selection (GS) in dairy cattle breeding with 47% of spring 2012 dairy AI sires coming from GS sires and the Economic Breeding Index for dairy bulls rising from €157 to €203 between 2009 and 2011.
- There have been increased landings and domestic processing of catch from foreign vessels. 20,000 tonnes of blue whiting were landed and processed in Killybegs in 2011, rising to 80,000 tonnes in the 1st quarter of 2012.
- The results from the first phase of the BETTER Farm beef programme showed a 49% increase in gross output on the beef farms involved, a 118% lift in gross margin.
- The value of Irish whiskey exports grew by 25% in 2011 to reach a record €222m.
- Over the past year, Enterprise Ireland provided in excess of €17m in financial support to the food industry which leveraged in excess of €50m in industry investment
- New investment of €23 million by key seafood companies is targeted to yield additional revenues of €76 million and 250 jobs by 2015.
- Improved scale has been achieved by Irish seafood companies with one company achieving an annual turnover of over €50 million and fifteen seafood companies now exceeding a €20million turnover.
- A joint Irish/UK mushroom promotional programme, co-funded by the trade and the EU, helped grow the UK mushroom market by 2,700 tonnes while Irish companies continue to increase their market share of the UK market.
- A total of 1,322 students enrolled in full-time Teagasc courses in 2011/2012, an increase on the previous year's enrolments.

Achieving Growth

5. Milestones for Success- Key Actions to July 2013

Attain an agri-food export target of €9.3 billion by end 2013

Enterprise Ireland will support 15 significant food and drink industry investments in 2013

Continued development of Food Works with 15 companies and launch a second application phase in early 2013

Work with seafood sector to create 158 new jobs by end 2014 by expansion of 18 seafood companies

The drinks sector will invest over €150 million in new facilities and projects in 2013

Quantify and assess outcomes from Teagasc Food SME Technology Support Programme

Achieve an annualised sales target of €15m from Marketplace 2012 and foster new buyer relationships

Attract graduate talent into the sector through the Bord Bia Marketing Fellowship (25 fellows) and Strategic Growth Programme (20 clients)

Achieve by end 2013, 90 food companies in Lean Manufacturing and 50 CEO/CFO in the Leadership4Growth programmes

The Irish Research Council/DAFM's to run a new 'Employment Based Postgraduate Programme' and employ a cohort of Masters research students in agri-food companies for 18-24 month

By end-2014, achieve 75% of food and drinks exports being supplied by companies signed up to the Origin Green sustainability charter.

10 further co-opetition projects to be advanced by Bord Bia

Increase overall value-added in the dairy, beverages, frozen foods, pet food, specialised bakery and snacks/confectionary sectors by €250m



5. Milestones for Success- Key Actions to July 2013

Increase seafood value-added by €50 million by 2013

Encourage B2B linkages by holding a further Regional Food Showcase

Create a directory of incubation space suitable for food entrepreneurs and publicise it to increase usage

Roll out a schedule of food and drinks Trade and Investment Missions to Middle East and USA

Teagasc to report on outcomes from its Technology Transfer Strategy for food companies

An international awareness programme for dairy products will be developed based on Origin Green

Devise, with industry participation, a strategy for the growth of farmhouse cheeses

Under the foresight4food programme, conduct consumer testing on 35 new or rebranded products

The Teagasc/ IDB Dairy Innovation Centre will continue to generate a pipeline of branded milk-based consumer products

The meat industry supported by EI will initiate a new research programme to increase the value of meat processing by-product and waste streams

Implement Action Plans for two priority areas (*Sustainable Food Production & Processing* and *Food for Health*) identified under the National Research Prioritisation Exercise

Continue implementation of the Africa Agri-Food Development Fund to position the Irish food sector as early movers in emerging African markets

DAFM will improve workforce productivity and flexibility to maintain effective service delivery. At the same time, it will work to achieve by mid 2014 a reduced staffing target of 3107 (a 20% reduction from 2010 levels)

DAFM will augment its existing provision of ICT shared service support to external bodies

Industrial clients to develop a new ingredient/ process, building on their existing use of Teagasc's dehydration pilot plant facility



5. Milestones for Success- Key Actions to July 2013

Complete an environmental assessment study on a range of scenarios under Food Harvest 2020 to guide future actions

Report on progress on adoption of best practice or knowledge transfer at farm level against benchmarks established

Achieve a successful outcome to Ireland's EU presidency and progress negotiations on the reform of the CAP and the CFP

Provide evidence based analysis of policy proposals on CAP post 2013 negotiations

Significantly increase the rate of aquaculture licence determinations which comply with national and EU environmental legislative guidelines

Devise mechanism to allow other forms of collaborative working arrangements, in addition to MPPs, be legally recognised

Achieve aquaculture licensing of one deep sea location; submit licensing application for another deep sea location.

Implement phase two of the Teagasc/Farmers Journal BETTER beef and sheep programmes by expanding to 30 beef farms and 10 sheep farms

DAFM will announce awards under its 2011 research Call and develop a new Call, possibly jointly with other funders, targeted at specific areas

Teagasc will roll out the Carbon Navigator for beef and dairy enterprises

Update Teagasc roadmaps from 2018 to 2020 to meet the FH 2020 targets

Seek joint EU funding for promotion of horticultural produce

Increase participation in collaborative farming initiatives through partnerships, share farming and contract farming models



5. Milestones for Success- Key Actions to July 2013

Roll-out the 2nd phase of the Agricultural Catchments Programme to assess and improve environmental sustainability

Reduce the administrative burden through improved online applications under SPS and AIM

Grow farmer Discussion Group participation to 12,000

Reduce the administrative burden on intensive pig and poultry units through a DAFM/EPA controlled animal waste transfer system

Implement the new Teagasc/UCD Professional Diploma in Dairy Farm Management

Continue improving economic efficiency through farm development plans and by achieving 5,000 Profit Monitors annually

AHI to continue the national BVD voluntary programme in 2012 and move to a compulsory programme in 2013 with annual reduction targets

AHI to introduce a voluntary national programme for the control of Johnes disease with dairy processing partners

AHI, Teagasc and partners to continue the CellCheck programme and to publish industry agreed annual SCC reduction goals

Teagasc to launch the mastitis cost calculator

UCD and Teagasc to develop a programme to progress their National Agricultural Research, Education and Innovation Partnership agreement

Teagasc and ICBF, will establish the Next Generation Dairy Herd to generate very high EBI bulls suitable for use by the Irish AI industry

ICBF will launch a new Gene Ireland breeding programme and beef breeding indexes and Teagasc will set up a new suckler cow research herd to evaluate the indexes

DAFM will develop a National Action Plan on Sustainable Use of Pesticides

Teagasc will prepare training solutions and crop protection strategies as part of the NAP on Sustainable Use of Pesticides

Develop solutions for the mushroom industry to deal with disease threats from Trichoderma and Virus

Develop a Forest Strategic Research Agenda

Actively support Irish involvement in research Calls under the EU 7th Framework Programme and input into the development of Horizon 2020

5. Milestones for Success- Interim Milestones

Interim milestones Primary Output

2013 Milestone
Increase value of
primary output by
€ 300m

9,000 farmers
participating in
discussion groups

New sheep
demonstration farm
established

Expand the Beef
BETTER Farm
Programme to non-
suckling systems

Two- year
specialised farm
manager training
option delivered

5,000 Profit
Monitors
completed annually



13,000 farmers
participating in
discussion groups

Achieve milk
solids of 359kg
per cow

Measurable
improvements 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
prevalance of
herds with BVD
persistently
infected animals
(PIs)

2015 Milestone
Increase value of
primary output by
€700m

5. Milestones for Success- Interim Milestones

2013 Milestone

Increase value-added by €500m

Value-added sector (exc. Seafood)

2015 Milestone

Increase value-added by €1bn

Dairy industry investment in milk powder facilities

New cheeses developed through Teagasc/IDB partnership

New FDI investment commitments by the infant formula sector

Progress 2 industry led research centres

Launch new Irish drinks products in the US following consumer testing

PAS 2050 accreditation achieved for major primary products

New research facility for Dehydration Technology and Smart Ingredients completed

Increase value of waste streams in meat industry

Significant progress made in new cheeses and other food products through Teagasc/IDB partnership

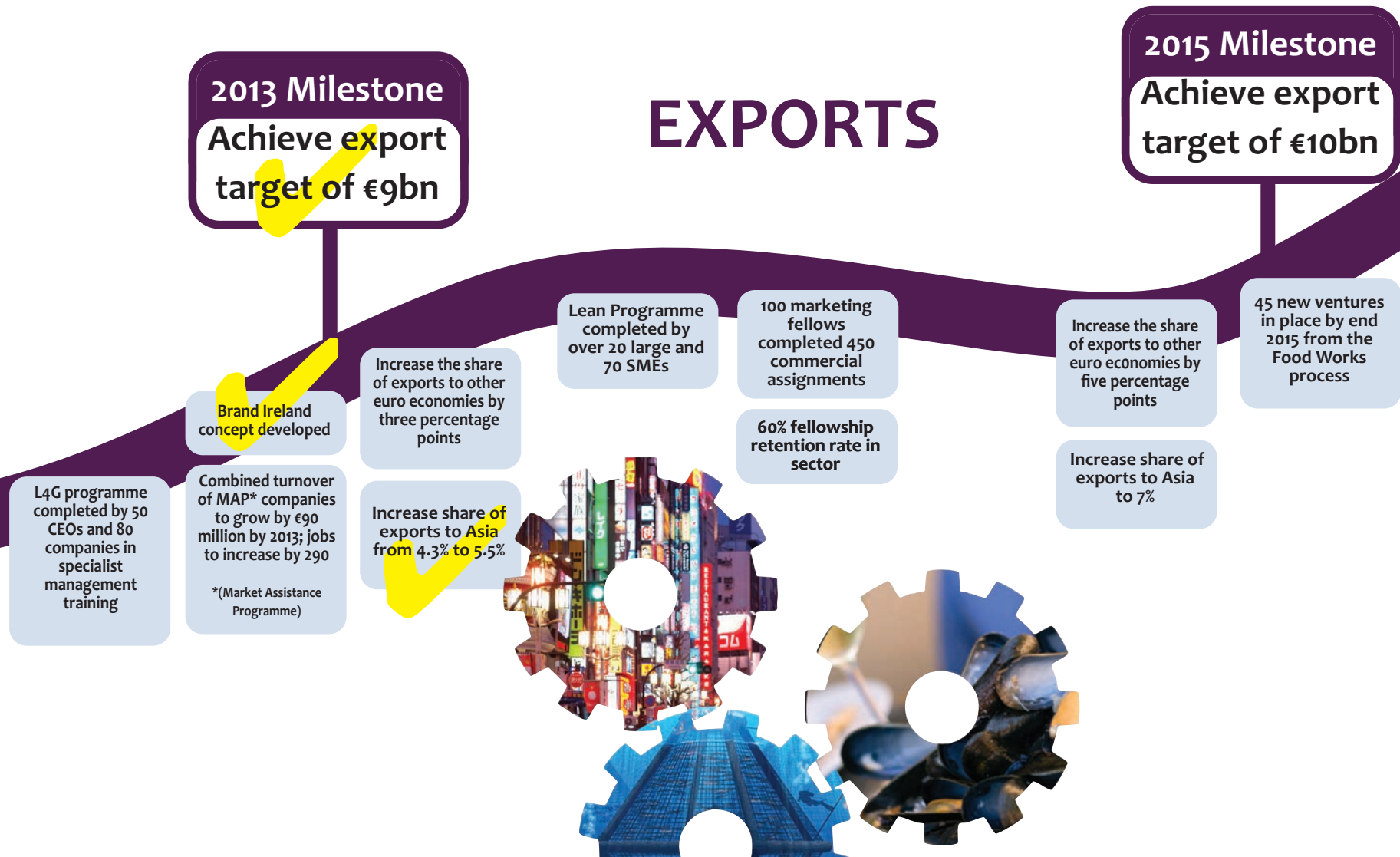
Build greater capacity in product development in the drinks industry

New Smart ingredients output from Teagasc Dehydration and Smart Ingredient facility

Stream of new products with functional properties from FHI and other initiatives



5. Milestones for Success- Interim Milestones



5. Milestones for Success- Interim Milestones

Aquaculture

2013 Milestone

Offshore aquaculture location determined

Licensing issues significantly progressed

Site selected

Planning received

Industry investment progressed

Significant increase in aquaculture licenses

Target market assessed

2015 Milestone

Harvesting commenced on 10,000 Tn unit

Increase annual aquaculture production by 10,000 Tn

Offshore harvesting commenced

17% increase in aquaculture production capacity

Seafood

2013 Milestone

Increase value by €50m

Turnover of €40m achieved by 1 company

Turnover of €20m achieved by 10 companies

Continental hub selected and investment agreed

Land & process catch from 4 foreign vessels per week

2015 Milestone

Increase value by €100m

Continental hub operational and generating €20m sales

Land & process catch from 8 foreign vessels per week

Members of the High Level Implementation Committee

Simon Coveney T.D.	Minister for Agriculture, Food and the Marine
Aidan Cotter	Bord Bia
Aidan O'Driscoll	Department of Agriculture, Food and the Marine
Dara Lynott	Environmental Protection Agency
Declan Hughes	Forfas
Gerry Boyle	Teagasc
Jason Whooley	Bord Iascaigh Mhara
Julie Sinnamon	Enterprise Ireland
Martin Heraghty	Department of Agriculture, Food and the Marine
Ronan Gallagher	Department of Public Expenditure and Reform
Tom Moran	Department of Agriculture, Food and the Marine

Secretariat provided by the Department of Agriculture, Food and the Marine



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