

Progress on Food Harvest 2020 recommendations

August 2014



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Food Harvest 2020- August 2014

A: Target achieved = 7% (14)

B: Substantial action undertaken and ongoing = 67% (144)

C. Action commenced and progressing =19% (41)

D. Action not yet commenced / at commencement stage = 7% (16)

| | Recommendation | | Current Response | Rating |
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| 3.1: Growth and competitiveness | | | | |
| 1 | The possible role of new risk management strategies such as a greater reliance on farm insurance systems to cover production and market risks should be examined by DAFF and relevant stakeholders, particularly in the context of the CAP post-2013 deliberations | DAFM | <p>The use of risk management tools at farm level will be driven by the private sector and ICOS have already held conferences in 2012 and 2013 for Co-operatives on the development and use of market tools to manage price volatility.</p> <p>DAFM participates in an EU expert group on agri commodities markets which includes officials and sectoral interest groups. Its role is to assess the use of futures markets as part of an overall risk management strategy and to discuss new EU regulations on commodities market trading. The European Commission launched the Milk Market Observatory in April 2014 and data on dairy prices, stocks, trade and outlook is supplied from all EU member states including Ireland. The Observatory's aim is to increase transparency and provide the most accurate market data, so that all actors in the milk supply chain can take well-informed business decisions.</p> | C |
| 2 | Irish Banks, in conjunction with relevant Government Departments (DAFF and D/Finance) should examine the scope for the increased use of mechanisms such as chattel mortgages and invoice discounting | Banks | <p>The issue of what credit products are offered remains a commercial matter for the banks themselves. They have examined chattel mortgages, invoice discounting and similar credit products and to date they do not consider them attractive options. However, they regard the agri-food sector as a sound investment area and the three main banks have dedicated agri-loan funds, have increased their numbers of specialist agri advisors and are actively lending. DAFM maintains regular contact with the banks to discuss credit availability, credit products and other issues affecting the sector.</p> <p>Access to finance for SMEs (including farmers) was identified as a key issue in the Action Plan for Jobs. A number of initiatives to improve access to finance have been progressed through the SME State Bodies Group, chaired by the Department of Finance and with participation from DAFM and all other relevant State bodies. The announcement in May 2014 of the establishment of the Strategic Banking Corporation of Ireland (SBCI) should provide a new source of lower cost finance with more attractive terms for Irish SMEs including farmers.</p> | C |

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| 3 | DAFF should examine the targeting of state supports to the sector with a view to further promoting competitiveness and sustainability | DAFM | <p>The achievement of the twin goals of competitiveness and sustainability are the main driver of DAFM policy. This is manifested by the following:</p> <ul style="list-style-type: none"> • Successful achievement of political agreement on the CAP reform package under the Irish EU Presidency in 2013, providing policy certainty to farmers in the years ahead; • Ensuring that the outcome was focused on increased sustainability and competitiveness, including improving environmental sustainability through greening, assisting generation renewal through additional payments for young farmers and increasing the market orientation of the industry; • Achieving a broad level of flexibility to tailor the outcome to Irish farming circumstances. Application of the “Irish model” of partial convergence of direct payments to farmers rather than the uniform payment ensures that the system is made fairer and more equitable while at the same time ensuring that the level of redistribution of payments between farmers is not of a scale that could jeopardise the achievement of the Food Harvest 2020 objectives; • Provision of top-up payments to new farmers under 40 of 25% for 5 years (equivalent to €16,000 on 50 hectares) using 2% of the national ceiling; top-up payments supplemented by priority for young farmers in allocation of payment entitlements from the national reserve and by further support for young farmers under the Rural Development programme with a separate strand of support for on-farm capital investment ring-fenced for young farmers: • Introduction of additional educational criteria to direct payments to genuine young farmers; • Targeting of RD resources to balance competitiveness and environmental sustainability through <ul style="list-style-type: none"> o An Agri-environmental scheme (GLAS) providing up to €5,000 for up to 50,000 farmers and which targets specific environmental challenges such as biodiversity, water quality and climate change o Continued strong support for disadvantaged areas (Areas of natural constraint), o Incentives for on-farm capital investment targeting key sectors (inc. dairy expansion post quotas in 2015), contributing to climate change objectives and supporting increased efficiency of holdings, o A suite of measures to support knowledge transfer and innovation, targeted advisory services on animal health and welfare and development on an EIP model to link research and farm practice, o Introduction of a beef data and genomics support measure aimed at significant improvement of the genetic quality of the beef herd, o Support to partly offset the start up costs of approved collaborative farming arrangements, o Support for quality schemes to assist farmers develop proposals for the marketing of distinctive local products, o Continued support of organic farming, for horticulture and for forestry sectors . • Exchequer support for development of QA schemes and eradication/control of animal diseases. <p>This targeted policy will be continued in the 2014-2020 Rural Development Programme currently being discussed by the Commisison</p> | B |
| 4 | The provision of credit to the farming, fisheries and primary processing sectors and to food and beverage SMEs should be specifically monitored with a view to ensuring the growth of viable businesses is not inhibited through lack of credit. Credit supply solutions should be supported through the work of both the Credit Review Office and the Credit Supply Clearing Group. | D/ETI | <p>The regular reports of the Credit Review Office show that no sector of industry has been disproportionately impacted by the reduction in credit since January 2010. The situation is being kept under review by the CRO on an ongoing basis through its review and appeal mechanisms which, to date, have upheld 60% of appeals lodged.</p> <p>The Minister for Agriculture and his officials meet with the Irish Banking Federation (IBF) on a regular basis to assess credit availability for the agricultural sector and currently agrifood loans comprises a good proportion of their lending programme and there appears to be a good flow of credit to farmers and SMEs with little obvious blockages . The IBF believes that credit is available for viable customers but emphasised the need for applicants to deal with market volatility by engaging in long term financial planning including cash flow projections.</p> | B |

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| 5 | Government should consider the specific needs of the food and beverages sector in its deliberation on short term export credit insurance scheme. | D/ETI | A forensic analysis of the Export Credit Insurance market in Ireland, including the specific needs of the food and beverage sector was undertaken by the Department of Enterprise, Trade and Employment in 2009. On the basis of that research and further analyses in 2010, the Government decided that a State-supported Export Credit Insurance Scheme was not justified. Since that report was undertaken, there are strong indications that the commercial market for such insurance has improved considerably so the case for any State scheme now, carries even less weight. The food industry continues to argue that an export credit insurance supported by the State is unnecessary to target new international markets (e.g. Africa) | A |
| 3.2: Farm level challenges | | | | |
| 6 | DAFF should specifically target competitiveness and viability in any future measures for the sector | DAFM | See response to recommendation 3 above. | B |
| 7 | DAFF should consider policy options to address increasing fragmentation. These would include support mechanisms to aid consolidation such as the introduction of targeted roll-over relief for land sales. | DAFM | Taxation decisions are primarily a budgetary matter. As part of Budget 2013 a new initiative to facilitate the restructuring of farm holdings was introduced in the form of a relief on Capital Gains Tax. Relief is now available to farmers who undertake the sale and purchase of qualifying agricultural land(s) which lead to a reduction in the fragmentation of a farm and an improvement in the operation and viability of the consolidated farm. Under Budget 2014, a review of agricultural taxation measures was announced and this is ongoing | C |
| 8 | DAFF in conjunction with other relevant Departments should identify and remove impediments to land mobility with particular emphasis on those in current EU and State schemes. Any remaining obstacles to partnership formation or other new models of farming should be removed. | DAFM | In 2011, a draft discussion paper on farm partnerships, prepared by DAFM in consultation with Teagasc was posted on the website and an internal DAFM working group set up to deal with constraints to partnerships (National and EU schemes) resolved the majority of issues. Practical assistance and advice on setting up farm partnerships is provided by the Teagasc Dairy Partnership Registration Office whose staffing levels have been augmented. A series of national information meetings on farm partnerships, contract rearing and share farming was jointly organised by Teagasc and DAFM. Budget 2012, included specific provision to incentivise partnerships while Budget 2013 included a measure to extend the definition of a registered farm partnership beyond dairy enterprises and allow other farmers benefit from the financial advantages such as 50% stock relief measure as well as the enhanced managerial, social and succession benefits resulting from farm partnerships. Work on the legal and administrative processes necessary to extend collaborative working beyond MPPs has progressed. The outcome of these financial and awareness raising measures has resulted in an increased take-up of farm partnerships over the past two years. There are currently 705 registered MPP, up from 523 in January 2012. In addition there were 112 share farming arrangements established in 2013 with data on new share farming arrangements in 2014 being collated | B |

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| 9 | DAFF should target all future schemes and income supports which have limited funding at those producers which have best potential for growth and competitiveness and in particular at young farmers with relevant qualifications and sound business plans, encourage greater mobility in land use and the achievement of appropriate scale | DAFM | <p>.. See 3 above. Under the current reform of the Common Agricultural Policy, the new Direct Payment Regulation, negotiated under the Irish Presidency, gives significant emphasis to young farmers and to generational renewal. Persons who qualify as 'young farmers' have priority access to the National Reserve and also have automatic participation in the Young Farmers Scheme. For the purposes of qualifying as a 'young farmer', Ireland has added a requirement for an agricultural qualification at FETAC Level 6 thus ensuring that only those with a genuine interest and competency in agriculture will benefit. Ireland has also allocated the maximum allowable amounts of 3% of the Basic Payment ceiling to the National Reserve and 2% of the national ceiling to the Young Farmers Scheme and has selected a method for calculating the payment which is most beneficial to all young farmers. The Young Farmers Scheme is designed to assist young farmers in the initial stages of establishing a holding in their own right and the benefits of the Scheme in conjunction with the benefits available under the National Reserve represent a significant encouragement for older farmers to transfer their holdings to the next generation of young, well educated young farmers.</p> <p>In addition the level of interest in the DEP, BTAP and STAP and their emphasis on knowledge transfer maximises the potential for growth and competitiveness among the 15,000 participants in the Teagasc and private advisory runs technology adaption groups.</p> <p>As mentioned in paragraph 3 above, the 2014-2020 Rural Development Programme will also include specific support measures for young farmers who meet the necessary education requirements as well as reinforcing the need for good business planning.</p> <p>See also recommendaiton 10 for the land mobility and farm restructuring measures included in Budget 2012 and 2013..</p> | B |
| 10 | DAFF should liaise with relevant Departments with a view to maintaining current tax/policy incentives to encourage long term development of the sector including long term land leasing, agricultural relief retirement reliefs, stamp duty and stocking reliefs. | DAFM- | <p>Ongoing liasion took place with D/Finance and Revenue Commissioners in advance of Budget 2011, 2012 and 2013. Further contact will take place, as required. Various farm related tax measures are already in place, including</p> <ul style="list-style-type: none"> • 100% stamp duty relief on transfers and purchase on land by young trained farmers; (this measure was extended for a further 3 year period in Budget 2013); • 90% agricultural relief from Capital Acquisitions Tax; • Full Capital Gains Tax – Retirement relief on farm disposals • Tax relief on income from long term leases; • General rate of stock relief of 25% and 100% relief for young trained farmers; (both these measures were extended for a further 3 year period in Budget 2013); • Additional measures were introduced in budget 2012, with the aim of encouraging farming as a a career for young people, incentivising partneship and stimulaing land sales and transfer; • New stock relief incentive for farm partnerships; • Reduced stamp duty on agricultural land transactions; and • Restructured Capital Gains Tax retirement relief. <p>Capital Gains Tax relief for farm restructuring, a new measure which was introduced in Budget 2013.</p> | B |
| 11 | Teagasc should improve the level of dissemination and adoption of available knowledge and best practice options on farm competitiveness. Specific benchmarks should be established and reported upon in terms of progress and comparisons with key competitors. | Teagasc | <p>Recent initiatives taken by Teagasc to progress the level of adoption of best practice include:</p> <ul style="list-style-type: none"> - Creating the Knowledge Transfer Directorate - Renewing all dairy joint programmes with all the major dairy processors across the country - Increase in discussion groups from 306 in 2008 to 814 in 2013 aided by the DAFM funded initiatives such as DEP, BTAP and STAP. There are currently approximately 13,000 Teagasc and 2,000 non Teagasc discussion group members. - Creation of the Greenfield dairy farm, dairy monitor farms and BETTER Beef, Sheep and tillage farms - Specific annual targets for each programme in terms of practice adoption are developed and measured at national level for dairy, beef, sheep, pigs, crops, environment, and Food. For example livestock enterprises indicators include measurement of grass utilisation, breeding, quality and output - Teagasc is supporting farmers in adapting to the requirements under CAP reform and the sustainable use directive - Teagasc is currently working with Animal Health Ireland to increase animal health best practice adoption - Teagasc is giving particular emphasis to the importance of soil nutrient management with a multi-annual nationwide campaign promoting best practice | B |

| 12 | Relevant agencies should increase adoption levels of best practice in animal health and breeding | AHI ICBF Teagasc | <p>See also Recommendations 63, 96, 121 and 123</p> <p>Mastitis/SCC reduction (CellCheck programme)</p> <ul style="list-style-type: none">- Over 4,000 copies of the 'CellCheck Farm Guidelines for Mastitis Control' have been purchased ..- Following the pilot CellCheck farmer workshops in 2011, training for over 700 service provider has been effected and 15 farmer work shops have been held,.-Analysis of SCC data is in trainand CostCheck calculators are now available from AHI and Teagasc <p>BVD</p> <ul style="list-style-type: none">-Following the voluntary BVD eradication programme, the compulsory programme was launched on 1st January 2013.• By end June more than 1.65M calves had been tested with 0.74% and 0.04% testing positive or inconclusive respectively• There is a high degree of farmer compliance with test results received for >97% of registered calves to date. There is a lower compliance with the recommendation to cull persistently infected animals, with ~50% of those identified to date retained in herds (falling to 30% for those identified in Jan/Feb)• BVD helpdesk has handled over 20,000 calls and BVD Implementation Group reviews implementation. <p>Johne's disease</p> <ul style="list-style-type: none">• The details of the core components of the Control Programme have been agreed• The Johne's Disease Implementation Group (JDIG) has met several times to discuss the delivery of the Voluntary Johne's Control Programme. Pending financial support, agreement has been reached, in principle, on rolling out a Pilot Programme during the second half of 2013 leading to a full scale national programme in 2014.• The materials for veterinary training have been completed and the first training event for vets occurred 4 July 2013.• A Programme Manager has been appointed on a full-time basis by AHWNI with responsibility for the management of the Control Programmes across the island of Ireland. <p>ICBF are focused on increasing adoption levels at the farm level. Data and information is routinely made available through direct contact to farmers, and via its website and its Annual Report. Technical updates are provided to Teagasc. ICBF have set performance targets for a number of parameters including</p> <table><thead><tr><th>Performance</th><th>2010 level</th><th>Current level</th><th>2015 target</th></tr></thead><tbody><tr><td>Increase the no. of sire recorded calf births.</td><td>1,290,717</td><td>1,300,197</td><td>1,500,000</td></tr><tr><td>Increase uptake of ICBF HerdPlus dairy</td><td>4,267</td><td>6,134</td><td>7,000</td></tr><tr><td>Increase uptake of ICBF HerdPlus beef</td><td>2,873</td><td>10,194</td><td>15,000</td></tr><tr><td>Increase no. AI bred dairy replacements</td><td>157,000</td><td>200,598</td><td>200,000</td></tr><tr><td>Increase no. of cows in milk recording</td><td>431,000</td><td>533,262</td><td>600,000</td></tr><tr><td>Increased liveweight</td><td>77,000</td><td>1,000,717</td><td>1,200,000</td></tr></tbody></table> <p>Teagasc researchers are working closely with ICBF to design improved dairy breeding schemes (including a programme of large scale genotyping of dairy cows and the establishment of Next Generation Research Herds) which will increase the rate of genetic gain in the dairy herd.</p> | Performance | 2010 level | Current level | 2015 target | Increase the no. of sire recorded calf births. | 1,290,717 | 1,300,197 | 1,500,000 | Increase uptake of ICBF HerdPlus dairy | 4,267 | 6,134 | 7,000 | Increase uptake of ICBF HerdPlus beef | 2,873 | 10,194 | 15,000 | Increase no. AI bred dairy replacements | 157,000 | 200,598 | 200,000 | Increase no. of cows in milk recording | 431,000 | 533,262 | 600,000 | Increased liveweight | 77,000 | 1,000,717 | 1,200,000 | B |
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| Performance | 2010 level | Current level | 2015 target | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Increase the no. of sire recorded calf births. | 1,290,717 | 1,300,197 | 1,500,000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Increase uptake of ICBF HerdPlus dairy | 4,267 | 6,134 | 7,000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Increase uptake of ICBF HerdPlus beef | 2,873 | 10,194 | 15,000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Increase no. AI bred dairy replacements | 157,000 | 200,598 | 200,000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Increase no. of cows in milk recording | 431,000 | 533,262 | 600,000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Increased liveweight | 77,000 | 1,000,717 | 1,200,000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | All relevant stakeholder should place a greater strategic emphasis on advisory programmes, such as Teagasc BETTER FARM which focus on low cost production methods | Teagasc | <p>Teagasc's BETTER (Business, Environment andTechnology through Training, Extension and Research) farm programme advisers and specialists work with a farmer for a period of 3-5 years with a long-term objective of improving farm efficiency and profitability. Teagasc works with over 100 BETTER/Monitor farms,i.e. 4 Greenfield Dairy, 14 Liquid Milk, 6 Heavy Soils Dairy, 39 Dairy monitor farms in Joint Industry Programmes, 37 Beef Suckling, 9 sheep and 3 Tillage; to improve competitiveness levels. Phase 2 of the Teagasc / IFJ Beef BETTER Farms programmes is underway and satellite groups have been put in place around 8 of the phase 1 BETTER Beef Farms. The performance of 24 monitor farms in the Teagasc Kerry Agribusiness Joint Programme shows that dairy milk solids production increased by 40% from 2005 to 2010. The Teagasc/Irish Farmers Journal BETTER Beef programme phase 1 has resulted in a 118% increase in gross margin across the 16 farms between 2008 and 2011. In 2008 the gross margin was €386/ha rising to €843/ha in 2012, an increase of €457/ha or 118%. On a whole farm basis across the group these farms are better off by just over €27,000. Two thirds of the gain in gross margin on the farms came from production gains and not as a result of an increase in beef price. The data from three Tillage BETTER farms show significant improvements in Gross Margin and in net profit at fixed prices</p> | B | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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| 14 | DAFF should ensure that its public good research programmes (FIRM RSF , COFORD) will be focused on the priorities identified in this report and continue to facilitate the building of capacity and capability in the research institutions whilst also encouraging inter-institutional and institute-industry collaboration. | DAFM | <p>The 2010 Call was targeted at priority research areas identified in FH2020 including supporting sustainable economic development & expansion of the dairy sector in particular. Awards of almost €10 million were made for collaborative research projects involving 13 institutions under FIRM, RSF and CoFoRD research programmes in this Call.</p> <p>In December 2011 a new Call for Research Proposals under FIRM, RSF and CoFoRD was launched guided by the two Strategic Research Agendas for food and agricultural research developed in 2011 (see 21 below) Areas prioritised for funding under the National Research Prioritisation Exercise (NRPE) cater very well for FH2020 related agri-food research. DAFM is currently leading a Priorisation Action Group charged with developing Action Plans for 2 of the Priority areas ie. 'Sustainable Food Production & Processing' and 'Food for Health'. Industry has regular engagement on research initiatives - facilitated through DAFM's FREA & AREA Advisory Groups and the COFORD Council - to ensure market relevance is retained. In November 2012, DAFM made research grant awards of €32 million to projects successful under its 2011 Call . The awards cover a broad range of research activities relating to sustainable food production and processing as well as forestry. Many of the projects funded are applied and pre-commercial in nature while there is also a heavy emphasis on research involving the modern biosciences. Meat related research features prominently which, when taken with additional investment in dairy research, ensures that the two main parts of the sector continue to be supported to the maximum extent possible</p> <p>In March 2013, DAFM launched a further Research Call for proposals . The areas covered by Call 2013 included animal and crop production, food and health, marine origin foods, forestry, the wider bio-economy as well as the safety, quality, integrity and sustainability of the supply chain. In November 2013 awards totalling over €26m were made in addition to some €6m which was awarded earlier in 2013 in respect of earlier calls. A new 2014 Research Call was launched in March 2014 focusing again on animal and crop production including horticulture, food processing, food safety, food and health, marine and forestry and it is hoped that awards will be made later this year.</p> <p>Industry has regular engagement on research initiatives to ensure market relevance is retained. A Strategic Research Agenda for the forestry sector has been developed through a working group of the CoFoRD Council and will be published shortly. A newly configured DAFM hosted industry led Expert Advisory Group on Agri-Food Research was established in May 2014 to advise on high-level research priorities and to contribute and support the work of the NRPE. This group is an amalgamation and revision of the AREA and FREA that have operated in the past and developed Strategic Research Agendas for both the agri production and food sectors. With regard to the NRPE process, DAFM is now acting as 'Champion' for the implementation of the 2 NRPE priority areas "Sustainable Food Production & Processing" & "Food for Health" and a Strategic Research and Innovation agenda (SRIA) is currently being developed, with input from all stakeholders and the Agri-Research Expert Advisory Group, that allows for the leveraging of non-Exchequer funding from a variety of sources for the benefit of agri-food researchers in the Irish public and private sector.</p> | B |
| 15 | DAFF should continue to promote active involvement of researchers from institutes and industry in relevant international research projects consortia and initiatives including, in particular the EU's Framework Research Programme | DAFM | <p>As the designated National Delegate & National Contact Point under EU FP7 (Food, Agriculture & Fisheries, and Biotechnology theme (FAFB), DAFM officials actively encourage interagency and industry researchers participation in EU and international research projects. In 2012 Ireland received 2.12% of funding from Call 6 of FP7, and exceeded in 2011 and 2012 the 2% target set.</p> <p>In 2013, initial figures indicate that Ireland received 2.96% of the available budget from Call 7 of FP7 KBBE again exceeding the 2% target. Total funding leveraged by Irish FAFB researchers and industry from the FAFB Co-operation Programme is €38,365,883 taking 2.15% of the available budget. This is the final year of the European FP7 Research Funding Programme.</p> <p>Horizon 2020, the next European Research & Innovation Programme, was launched on December 11th 2013 following the successful conclusion of EU negotiations. The National Contact Point has been working closely with the research community ahead of the deadline of 26th June 2014 for the first Calls under Horizon 2020. The Department continue to lead Irish representation on the Governing Boards of 2 EU Joint Programming Initiatives involving over 20 Member and Associated States. Ireland assumed the role of Chair of the JPI "A Healthy Diet for a Healthy life" during second half of 2013. Ireland is also a founder member of the international Global Research Alliance on Agricultural Greenhouse Gases. This alliance comprises 31 countries and became fully operational on the signing of its Charter at the Summit in Rome in June 2011.</p> | B |

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| 16 | Teagasc agricultural research should prioritise the following areas: i) animal breeding; ii) grass breeding, evaluation and utilisation iii) environmental research relating to climate change and water quality; iv) tillage and bio-energy research and v) economic analysis of policy change and market developments on agriculture and farming. | Teagasc | Agricultural research priorities (i)- (v) are reflected in Teagasc's Statement of Strategy 2012-2015 and in 2013 Business Plans. Teagasc has also prepared a new Research Strategy which reflects these priorities. For instance, Teagasc has a significant national breeding programme for dairy, beef, and sheep which focus on improving genetic traits, incorporating genomic selection as well as assessing improvements available from non genetic performance such as animal health. There are currently 17 breeding projects ongoing with national and international collaborators with particularly close links with ICBF. | B |
| 17 | DAFF, in conjunction with relevant stakeholders, should establish a key stakeholder group to develop the Irish dairy and beef sectors into global leaders in the genomics field and develop communication channels to encourage uptake at farm level. | ICBF | <p>ICBF has already established dairy and beef stakeholder groups, which meet at least 3 times per year to discuss and implement improvements to ICBF genetic evaluation and breeding program systems (including genomics). Teagasc provides key input to these meetings. Through improvements in uptake of services (see 12 above) and ongoing technical /industry developments (discussed at industry meetings), ICBF are confident that the current level of genetic gain in dairy (€15/cow/year, based on 5 year average), can be maintained into the future. The comparable figure for beef is €2/cow/year. The much lower levels reflecting the reduced number of beef bulls tested on an annual basis (10 bulls compared to 50 in dairying) and the fact that only 20% of suckler beef calves are AI bred on an annual basis (compared to 70% for dairy bred calves).</p> <p>To try and address this a new GEN€IR€LAND beef program was established in 2012, with the objective of doubling the rate of genetic gain in beef by 2020. The new Maternal breeding program is currently being rolled out to the industry, with 220 bull breeding herds signed up to date and around 40 young bulls purchased across 11 different breeds .This is a huge undertaking by ICBF as it requires managing 11 different breeding programs (involving the relevant herdbook, AI companies, pedigree bull breeders and commercial suckler farmers) on behalf of the interest. However, the benefits are potentially significant as experience from the pig and poultry sectors have clearly demonstrated that rates of genetic gain are heavily dependent on being able to influence the breeding decisions in the elite nucleus herds. In addition Tully has been converted to a commercial progeny test station, with some 600 animals (the progeny of GEN€IR€LAND sires) slaughtered to date. The new terminal and maternal indexes have also been rolled out to the industry, with a lot of interest being generated through the BTAP discussion group program. The new suckler herd at Teagasc Grange has also been established with 165 animals purchased (75 from the dairy herd and 90 from the beef herd). Within each of these groups, high and low genetic merit animals have been targeted, which will allow accurate evaluation of the new maternal indexes. The heifers have already started to calve down, with early results indicating that the indexes are correctly identifying the animals with better maternal attributes.</p> <p>On dairying, Teagasc and ICBF have now established the Next Generation Dairy Herd at Teagasc Moorepark to generate; (i) accurate data for future-proofing the EBI, (ii) data for research (into genetic and genomic evaluations) and (iii) high EBI bulls suitable for the GEN€IR€LAND dairy breeding program. A total of 110 high EBI genetically animals have been assembled (average EBI = €232). In addition a control herd of 53 animals (173 animals in total) has also been assembled of national average genetic merit (average EBI = €120). All animals have now calved and are in milk. Key data is being collected on these animals including; milk, fertility, health, disease and feed efficiency. However, it is too early to draw conclusions on cost of production traits, such as feed intake and/or feed efficiency.</p> <p>The new Beef Genomics Scheme, announced in budget 2013, will progress genetic selection in the beef herd as to date all stock bulls and a selection of highly related have been tissue tested and their genomic evaluation determined.</p> | B |

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| 18 | Relevant stakeholders should give consideration to the establishment of an inter-agency, third level institute and industry forum, chaired by DAFF, to discuss and address the sector's ongoing skills, training and development needs and in particular those of young farmers and new entrants. | Teagasc | <p>This recommendation is being actively pursued through Teagasc's Education Forum which involves stakeholders from farm organisations, industry, IOT and University sectors, aimed at addressing the vocational training needs of the agricultural industry. The Department is represented on this forum which is working well and its format and membership could be augmented by including other stakeholders, if desirable.</p> <p>Over 3,500 students are currently participating in a variety of education programmes through agriculture and horticulture colleges, regional education and an online course option. All courses are within the FETAC (NQA) awards framework (level 5 and 6) or the HTEAC (NQA) which are jointly run with Institutes of Technology (level 7/8). Contributions are also made to joint level 8 honours degree courses with Universities. IDIA would welcome input or consultation in this process.</p> | B |
| 19 | The importance of commercial and management development skills is increasing and should remain a core part of the training courses provided by Teagasc and the agricultural colleges. | Teagasc | <p>All Teagasc education programmes involve modules devoted to the financial management of farms. Both the extent and content of financial modules are being constantly revised in response to stakeholder requirements. Recently, the financial components of its Level 6 Programme has been substantially upgraded in line with FETAC requirements. Teagasc was a founding institution of the New Dairy Business Degree which has financial and management development modules as core. On foot of a FH 2020 recommendation, Teagasc developed a Professional Diploma in Dairy Farm Management programme in consultation with stakeholders and UCD. This new programme commenced with nineteen participants in September 2012. In addition, development of profit monitors which are an integral part of the DEP, BTAP and STAP, are a practical application of commercial and development skills.</p> | B |
| 20 | Eligibility criteria for State support should include the attainment of higher minimum levels of education or training as well as ongoing participation at advisory and extension options | DAFM | <p>The supplementary payments to young farmers under the EU Direct Payments Scheme and the preferential access to the national reserve and the additional funding possibilities under the Rural Development programme are limited to farmers with a minimum FETAC level 6 or equivalent qualification.</p> <p>As mentioned at recommendation 9 above, Ireland has decided to apply an agricultural qualification requirement at FETAC Level 6 in order for persons to meet the definition of 'young farmer'. The significant benefits for those who qualify as 'young farmers' represent an attractive inducement for persons entering agriculture to achieve a very high level of knowledge and competency and as a consequence creates a highly motivated, energetic and well educated group of farmers. The same requirement is applied to those who intend to qualify as 'new entrants' to farming, a category which also gives priority access to the National Reserve. Also the 2014-2020 Rural Development Programme will place particular emphasis on compliance with appropriate training levels by young farmers, while participation in tailored training is a precondition of the GLAS scheme.</p> | B |
| 21 | DAFF should establish structures to facilitate greater input and resources from the agriculture industry into the design and structure of primary research programmes | DAFM | <p>To facilitate greater input from industry into primary research programmes, a Strategic Research Agenda (SRA) was developed by the industry-led, broad stakeholder Agri Research Expert Advisory (AREA) Group and launched in December 2011. The document, 'Stimulating Sustainable Agricultural Production through Research and Innovation' identifies the key research priorities needed to deliver on the growth targets in Food Harvest 2020. In early 2012 the COFORD Council Forest Research Working Group (CCFRWG) was established to develop a Strategic Research Agenda for the forest sector and this should be completed by the end of 2013. Representatives from the Agri-Food industry were present at a stakeholder event in November 2012 organised by ForFas to contribute to the development of the action plans.</p> <p>DAFM's Research Call for proposals announced in March 2013 was guided by this SRA and DAFM is championing the implementation of the Action Plans for "Sustainable Food Production & Processing" & "Food for Health", two of the priority areas under the National Research Prioritisation Exercise (NRPE). A set of metrics developed by the Prioritisation Action Group (PAG) to monitor the impact of State investment under these and all other NRPE Action Plans was adopted by Government. The new DAFM hosted industry led Expert Advisory Group was established in May 2014 to advise on high-level research priorities and to contribute and support the work of the NRP</p> | B |

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| 22 | Consideration should be given to innovative funding mechanisms to support agricultural production research including co-financing by industry | Industry | <p>The current collaborative research venture between key meat industry processors and Teagasc on dairy beef production and optimal beef bull production is a good indication of innovative funding mechanisms being pursued by primary industry. The new jointly funded programme between Teagasc and a major dairy co-operative to improve the efficiency and profitability of milk suppliers' farm enterprises fulfills a similar function at farm level for dairy farmers. The Teagasc/Farmers Journal Better Farm Beef Farm Programme is co-funded by industry and the expanded phase two of the programme involves increased industry contribution funding for three advisors. Agreement has been reached with pig producers to collect a levy to finance pig research and advisory activities. The statutory Order to give legal provision for the Teagasc Joint Pig Levy. This was signed by the Minister on 26 March, 2013, having been approved by the EU and by the Oireachtas.</p> <p>DAFM and the Irish Research Council (IRC) have developed an industry based Bioeconomy Employment based Postgraduate Programme involving 18-24 month placement in agri-food companies. DAFM partnered with IRC in two of its recent employment-based programme Calls resulting in DAFM part/fully funding 3 Masters & 2 PhDs in successful projects with a total DAFM contribution of approx.€200,000 to date. An industry partner contributes a further €16,000 per annum for each of these awards. The Call for the 2014 Employment based Postgraduate Programme was launched recently & DAFM has agreed to continue to participate in the scheme. It is expected that awards will be made by end Q4.</p> | B |
| 23 | With the aim of ensuring the competitiveness and viability of Irish production, DAFF should monitor and appraise policy, trade and commercial developments at EU and other relevant levels with respect to the use of existing and emerging technologies in areas such as biotechnology and genetically modified organisms (GMOs). | DAFM | DAFM constantly monitors and is actively supporting EU Commission efforts to minimise delays in the authorisation process for the placing on the market of animal feed ingredients consisting of, or containing GMOs. Delays in authorisation have impacted negatively on the animal feed trade in recent years. DAFM will also keep abreast of developments in the controls aimed at governing the coexistent cultivation of GM crops alongside conventional and organic crops. However, given that it is unlikely that GM crops will be cultivated in Ireland in the foreseeable future, such action is only a precautionary measure. | B |
| 24 | DAFF, in conjunction with other Departments and State agencies such as County Enterprise Boards, FÁS and LEADER to develop programmes to encourage farm diversification including innovation vouchers, agri-tourism, eco-tourism, etc. | DAFM-D/CEGA | <p>To end March 2013, €4.41m has been invested in diversification project activities, €2.97m been the RDP element. In addition €18.5m has been spent under the encouragement of tourism activities of which €12.6. was claimed from the EU. The rate of aid for the Diversification capital projects was increased from 50% to 75% in April 2012. From April 2012 to March 2013 the investment in Diversification was €1.67m which represents nearly 60% increase on the previous years under this measure. 767 innovation vouchers were approved in 2012 to small companies of which 525 have been completed..</p> <p>The EPA also engages with the tourism sector in a number of different ways and sits on the Eco-Tourism Ireland steering group. Their projects such as Green Hospitality Programme focus on responsible tourism and is currently developing an Eco-Tourism mark as part of the basket of accreditations currently offered under the programme.</p> <p>Teagasc Options programme has been specifically developed to support all farm diversification, while DAFM submitted an agri-tourism proposal to D/TTAS for consideration.</p> | B |

| 3.3: Industry level growth | | | | |
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| 25 | Enterprise Ireland and Forfás should benchmark Irish industry against key international competitors to illustrate the main input and regulatory factors affecting competitiveness and recommend approaches towards dealing with the challenges. | EI Forfas | <p>The NCC in conjunction with Forfás benchmark Ireland's competitiveness on an ongoing basis. Forfás recently published Ireland's Competitiveness Performance 2013. report. This report assesses Ireland's international competitiveness in relation to our key competitors across more than forty competitiveness indicators in the areas of costs, productivity and innovation, labour market and skills, investment and infrastructure, the business environment and quality of life and sustainability. It provides an assessment of our strengths and our weakness to assist policymakers in determining the policies needed to ensure Ireland is a more competitive location in which to do business.</p> <p>http://www.forfas.ie/media/Ireland's%20Competitiveness%20Performance%202013%20Online%20FINAL.pdf</p> <p>Forfás also published another benchmarking report on enterprise costs recently - The Costs of Doing Business 2012. This includes detailed cost profiles to assess the importance of various costs to 17 manufacturing and services sectors. The report includes a wide range of benchmarks which measure Ireland's cost performance vis-à-vis our key competitors for trade and investment. It also assesses progress made to date and sets out further actions to reduce excessive business costs. Seven different cost components are examined: labour, property, utilities, transport, credit, professional services and general cost environment.</p> <p>Forfás conclude that from April 2008 to July 2012, Irish cost competitiveness improved by almost 19 per cent according to the real HCl measure (and 10.6 per cent in nominal HCl terms). Prices have now fallen back to levels last seen in 2002. Reductions in costs have been achieved across a range of business inputs and the pace of correction is a reflection of the open and flexible nature of the Irish economy, the depth of the recession, the weak performance of the euro and policy reforms implemented.</p> <p>http://www.forfas.ie/media/08042013-Costs_of_Doing_Business_2012-Publication.pdf</p> <p>Forfas NCC Ireland's Competitiveness Scorecard 2014 indicates a continuing trend towards increased competitiveness for Ireland. From an EI perspective, driving a competitiveness agenda with the food sector is primarily through the 3-stage Lean offer.</p> | B |
| 26 | State and industry must address the key input costs of energy, waste and labour to achieve greater alignment with the costs of our international competitors. | D/ETI D/EHLG, D/CENR | <p>While Ireland has had considerable success in reducing a range of costs since 2008, it remains a relatively high cost location which is an important consideration particularly for the low margin sectors of the agri-food industry. By end 2013, Ireland had reached 17th in IMD world competitiveness rankings up from 24th in 2011.</p> <p>At April 2014, Ireland's labour costs are the 8th highest in the Euro area..</p> <p>Electricity costs for large energy users and SMEs are the 6th and 5th highest amongst euro area 15.</p> <p>Ireland is 5th most expensive location from 16 countries for water for industrial users.</p> <p>Waste costs in Ireland remain high, landfill gate fees are the 5th most expensive out of 10 countries while non-hazardous thermal treatment fees are 3rd highest out of 9 countries</p> <p>Diesel prices are 7 per cent more expensive in Ireland than in the euro area</p> <p>DAFM has relatively little direct influence on these prices but as an advisor to the National Competitiveness Council, our representative constantly impress on the NCC the urgent need to achieve greater alignment with international competitors</p> | C |
| 27 | Industry should urgently pursue alternate CHP and other renewable energy options | Industry | <p>EI supported a major green energy efficiency investment in 2010 in the Food sector and food companies continue to participate in energy efficiency schemes operated by SEAI such as Energy MAP and to avail of capital allowances available for energy efficient equipment. IDIA is about to commence a Green Business backed initiative on water efficiency in dairy processing, the findings of which will be circulated to all industry. Industry cites the policy conflict in this area whereby CHP operators within the EU ETS are penalised. They regard this as a work area that has yet to begin.</p> | D |

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| 28 | The current DAFF/Enterprise Ireland/Bord Bia supports for Lean Manufacturing and Management Development should be expanded | DAFM EI | <p><u>Bord Bia</u> :Using part of the €2.5m marketing allocation in the Food Competitiveness Fund, Bord Bia has extended its Marketing Fellowship Programme and has introduced a two year Alumnus programme. In 2011, Bord Bia, FDI and DIT developed and launched the first dedicated Food Export Graduate programme. This involves 15 graduates working on behalf of Irish food and drink companies in their export markets over a period of 18 months. This programme has been designed to assist companies to build sales and capability in target markets along with developing and retaining new talent within the Irish food industry.</p> <p><u>DAFM</u> - €1.5 m was drawn down in 2010 from the DAFM Food Competitiveness Fund for LEAN manufacturing and other measures which are operated by EI. In 2011, 2.2 m was spent on lean manufacturing, leadership, innovation, commercialisation and R&D measures while €1.6 m was spent in 2012.</p> <p><u>EI</u> Their management development programmes, delivered in collaboration with leading international providers, equip Food Business leaders with the tools and techniques to operate more effectively, and to achieve export gains. In total as of June 2014, 106 companies have developed their management capability through the range of customised management development and Lean manufacturing initiatives including</p> <p>Leadership 4 Growth L4G Food . The EI flagship leadership and strategy programme, is aimed at developing and enhancing the leadership ambition, mindsets and capabilities of Irish CEOs to lead innovative, scalable companies, capable of achieving sustained international growth. It commenced in February 2011 and is conducted by the IMI in partnership with a Swiss lead provider (IMD). Three programmes have been delivered since 2011 with 60 CEOs /Divisional Managers of leading Food Companies completing the programme. The fourth programme in 2014 includes 6 CEO's from across the food sector. The 2014 target of 100 CEOs availing of the L4G programme, including the International Selling Prog. has already been met with 106 companies involved by mid year.</p> <p>Strategic Leadership 4 Chief Financial Officers (SL4CFO)</p> <p>The Strategic Leadership 4 Chief Financial Officers is an Enterprise Ireland's programme aimed at developing a cohort of world-class strategic CFOs with the financial leadership and strategic insight to drive growth in their organisations. 12 food companies have participated to date in EI's CFO Strategic Leadership Programme including three in 2014.</p> <p>International Selling Programme is EI's export sales development programme targeted exclusively at maximising export sales. This customised, practical programme is delivered by DIT in partnership with a panel of world-class experts and practitioners. The programme enhances the ability to access new markets and accelerates export sales growth. 28 food companies have participated to date in EI's International Selling Programme including 6 in 2014.</p> <p>EI's Management 4 Growth Programme piloted in 2011 in collaboration with DCU and 6 food companies participated in a cohort of 20. The most recent Programme involved 2 food companies and recruitment is currently underway for the 2013 Programme. The programme launch date is the October 18th. A breakfast briefing was held for potential participants on June 27th.</p> <p>A new Innovation 4 Growth Programme was introduced in 2014 which is currently actively recruiting. This is targeted at innovation leaders in companies with a view to building sustainable innovation capability.</p> <p>EI's Lean programme is designed to encourage clients to adopt Lean business principles in their organisation to increase performance and competitiveness. The Lean Business Offer is made up of three levels of support: • LeanStart • LeanPlus • LeanTransform</p> | B |
| 29 | Key players should develop a plan to consolidate and rationalise capacity by end of 2010 and cooperate in measures to achieve its implementation by 2015. | Industry | The industry view is that industry rationalisation remains a decision for the boards of respective companies and that some significant steps have been taken to rationalise activities. The State's role is one of assisting and encouraging rationalisation where possible and EI is active in this field | D |
| 30 | In the interim, industry should explore mechanisms for collaboration to gain strategic advantage. | Industry | DAFM and Bord Bia met the Competition Authority on the principles of co-opetition where businesses and sectors compete in some areas and cooperate in others to secure new markets, larger contracts or reduce procurement costs. Bord Bia launched a series of support programmes on sourcing, market development and logistics to facilitate further companies adopting co-opetition. Mechanisms for collaboration were then progressed with relevant sectors and companies in 200 companies involving in 28 projects. The principle areas involved were sourcing, promotion, procurement, market access/trade, logistics and mentoring. Work programmes and support services were put in place to deliver collaboration in other key areas. Examples of active collaboration in export markets among these co-opetition projects include resource sharing and partnering in Shanghai, joint marketing of beef in Spain, farmhouse cheese projects in the US and Germany and Mushroom promotion in the UK market. | B |

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| 31 | Future State support for the primary processing industry will prioritise innovation and projects addressing current structural weakness | D/ETI, DAFM- | <p>State supports for primary processing already emphasise innovation and competitiveness. The DAFM Dairy Investment Fund aimed to increase efficiency by supporting upgrading of plant and developing value-added products. Grant payments amounted to €12 million were made in 2012, supported investment by industry and completed that programme. The Beef and Sheepmeat Capital Investment Scheme is part of the Department's strategy to ensure the long-term competitiveness of the primary processing industry. The Scheme supports investment in scale and efficiency in primary processing, and added value in further processing for retail, food service and manufacturing outlets. It is funded by the Department and managed by Enterprise Ireland. Grant payments of €8.7m in 2012 and €5.7m in 2013 issued to companies awarded aid under the Scheme. In addition, the Department paid €1.4 m in 2012 and €878,000 in 2013 in grant aid to support investments in horticulture and small meat enterprises</p> <p>The Teagasc Food Research Programme involves extensive engagement with around 300 food companies, ranging from large dairy based FDIs to Irish based SMEs. Initiatives that have been recently implemented include a SME Technological Support Service which is jointly operated with EI. Teagasc has initiated a public private partnership (PPP) initiative with the Irish Dairy Board to develop a range of new cheese products, see 73 following. Work is also developing on the industry led dairy and meat technology centres, the dairy centre is expected to be established in 2014 while the meat technology centre will be 2015 or later.</p> | B |
| 32 | DAFF will engage with the Competition Authority to highlight the sector's global operations and the comparative scale of its main competitors; | DAFM | DAFM has met with the Competition Authority on two occasions to outline the issues- | C |

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| 33 | <p>Relevant State Agencies such as Enterprise Ireland should focus on increased employment in a targeted cohort of Food and Beverage companies.</p> | EI | <p>Enterprise Ireland has invested heavily in the food industry in the last two years. A large proportion of this investment has been towards companies in the dairy industry as it prepares itself for the uplift in milk volumes post quota removal in 2015. These investments have been towards projects that will deliver infrastructure to sustainably produce infant milk powder and higher value ingredients for export that are higher up the dairy value chain. In the first half of 2014, the Food Division supported: -</p> <ul style="list-style-type: none"> • 31 significant projects greater than €500K in value; • 1,255 new jobs commitments; • Enterprise Ireland investment will leverage an estimated total company investment of €345m. <p>In 2013, the Food Division supported: -</p> <ul style="list-style-type: none"> • 41 investments that were greater than €500K in value; • Over 900 new jobs commitments; • Investment that will leverage an estimated total company investment of €430m. <p>The 2013/2014 output compares favourably with 2012 when Enterprise Ireland approved 19 significant projects which, between them committed to create 1500+ jobs - the largest of these being the Kerry R&D Centre with direct jobs commitments of 900 in Co Kildare.</p> <p>The 2013 projects include the following: -</p> <ul style="list-style-type: none"> • The €140m Glanbia Ingredients Ireland Limited (GILL) Belview project creating over 1,600 direct and indirect jobs and contributing an estimated €400m p.a. to the economy with the development of a world-class dairy facility on the Kilkenny/Waterford border. • The €33m Dairygold project will repurpose the site and sustain 865 jobs. • The €14m ABP expansion in Cahir with 25 new jobs is significant because it's the first gel bone plant in the UK and Ireland and the first in Europe since 2003. It moves rendering from commodity to food grade material. <p>Overall since January 2012, employment in the food and drink sector has increased by 1,323 in EI sponsored compnies with up to 75 post-doctorate contract research positions to come on stream over the period 2013 to 2017.</p> | B |
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| 34 | Relevant State Agencies such as Enterprise Ireland should support SMEs with a comparative advantage in niche markets and which offer job creation potential. | EI | <p>Enterprise Ireland is engaged on an intensive, one to one, basis with key SME food clients to significantly grow and scale their business via innovation and greater competitiveness with a view to creating additional employment.</p> <ul style="list-style-type: none"> • In 2013, Enterprise Ireland approved 58 SME projects with 482 new jobs commitments. This funding of just over €9m leveraged an estimated €54m in company investment towards Job Expansion, Lean and R&D. • As of June 2014, Enterprise Ireland approved 25 SME projects with 440 new jobs commitments. This funding of almost €10m will leverage an estimated €57m in company investment towards Job Expansion, Lean and R&D. <p>Major SME investments supported by Enterprise Ireland in 2013 and 2014 include: -</p> <ul style="list-style-type: none"> • Green Farm Foods, a leading producer of premium cooked meat products based in Rathowen, Co Westmeath, will create 30 jobs over the next three years as part of a €2.8million investment. • O'Brien Fine Foods, a company based in Timahoe, Co Kildare, and specialising in premium cooked hams, sausages, rashers and puddings, will create 51 new jobs over the next three years as part of a €3million investment. • Swift Fine Foods, located in Castleblayney, Co Monaghan, produces premium quality chilled and frozen ready meals for the retail trade and foodservice markets, and is creating 53 jobs over the next three years as part of a €3million investment. <p>This follows on from the work of previous years when: -</p> <ul style="list-style-type: none"> • In 2011, EI approved €3m in support to 16 food SME projects including lean, expansions, R&D and exploration of new opportunities. • In 2012, Enterprise Ireland approved 15m in support to food clients projects including lean, expansions, R&D and exploration of new opportunities. • Under the seafood processing business investment scheme, an investment programme of €10.6 million, involving grants of €2.65 million was approved by BIM in 2014. The 38 seafood companies which are a particular focus of BIM's business development effort have been performing very well with combined sales revenue increasing by €146 million over the last four years. This investment created 100 jobs in 2014 but will generate 157 new jobs by 2016. | B |
| 35 | Industry and State should prioritise implementation of the relevant findings of the report on "Future Skills Requirements of the Food and Beverage Sector". | Industry Forfas | <p>Forfas took a lead role in progressing its implementation and it outlined to the Food Harvest HLIC the significant advances which have already been achieved. Details of progress made on graduate training, leadership, LEAN manufacturing, management development etc are outlined in 28 and 58.</p> <p>Forfas has also been active in pursuing the roll-out of an Operative Technician Accreditation Programme with Skillnets, FDI are a partner in the Life Sciences Skillnet which offers FETAC level 5 training modules through a network of experts while FDI themselves intend to run a series of regional food industry workshops in 2011 covering food regulations, overview of supports and programmes available to industry and input from the IBEC Green Enterprise Executive. During 2011 a number of IMPROVE IPQ Accredited Programmes were designed and piloted by Taste4Success under the Skillnets programme in 5 companies from the dairy, beef, pigmeat and consumer foods sectors.. An additional five new programmes will be developed and run in a further 6 companies (11 locations) during 2012. Teagasc intends to establish a science and technology graduate placement programme for innovative SMEs. This programme is designed to increase the scientific absorptive capacity within indigenous food companies in order to support their innovation needs. It would allow staff of food companies to participate in advanced professional degree training up to Ph.D Level while still in employment.</p> <p>In 2011 Bord Bia, FDI and DIT developed and launched the first dedicated Food Export Graduate programme. This involves 15 graduates working on behalf of Irish food and drink companies in their export markets over a period of 18 months. This programme has been designed to assist companies to build sales and capability in target markets along with developing and retaining new talent within the Irish food industry.</p> | B |

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| 36 | Industry should avail of existing supports to increase the skills base within the sector particularly in relation to lean manufacturing, innovation, commercial skills (foreign language, marketing, selling, exporting, financial) and leadership. | Industry | See 28, 35 and 58 for details on industry response. | B | | | | | | | | | | | | | | | |
| 37 | <p>Having considered international benchmarks, the Committee believes that industry investment in R&D should be doubled by 2020 in line with the following targets:</p> <table><tr><td>Sector :</td><td>Current :</td><td>2020 Target</td></tr><tr><td>Beverages/Bakery:</td><td>0.5% :</td><td>1%</td></tr><tr><td>Dairy Functional Foods:</td><td>0.5% :</td><td>1%</td></tr><tr><td>Consumer Foods :</td><td>1.1%:</td><td>2%</td></tr><tr><td>Primary Meats:</td><td>0.5%:</td><td>1%</td></tr></table> | Sector : | Current : | 2020 Target | Beverages/Bakery: | 0.5% : | 1% | Dairy Functional Foods: | 0.5% : | 1% | Consumer Foods : | 1.1%: | 2% | Primary Meats: | 0.5%: | 1% | Industry | <p>This action is specifically directed at industry research.</p> <p>Research and innovation performance in the agri-food industry has continued at enterprise level and the cohesion among research funding bodies and performers around the core objectives of Harvest 2020 is continuing to improve. However, Forfás data indicates that, for Irish and foreign owned food and drink enterprises, expenditure on R&D and innovation remained at 0.5% of sales for 2012. Among Irish-owned firms, expenditure increased from €57m in 2011 to €61m in 2012. While foreign-owned subsidiaries in the food and drink sector in Ireland reported a decrease in expenditure from €27m in 2011 to €23m in 2012. For both indigenous and foreign owned food and beverage enterprises, Forfás data indicates that expenditure on R&D and innovation remained at 0.5% of turnover for 2011. Among indigenous firms, expenditure increased from €79m in 2010 to €81m in 2011. Similarly, among foreign subsidiaries in the food and drink sector in Ireland, expenditure increased from €51m in 2010 to €54m in 2011.</p> <p>State research funding levels have risen with a range of active research support programmes existing across competence centres / industry led research centres, innovation partnerships, innovation vouchers & in-company R&D supports. The Government published the outcome of the National Research Prioritisation Exercise in early 2012 and work is ongoing to ensure coherent implementation among funding agencies and performers of the key areas prioritised for investment over the period to 2017. Critically there is a strong focus on the potential of the agri-food sector broadly defined and delivery of Harvest 2020 objectives, with implementation action plans now agreed in the areas of Food for Health, Sustainable Food Production and Processing and Manufacturing Competitiveness. DAFM alone has invested €75million over the past three years in its competitive research programmes SFI and Teagasc launched their first joint call in relation to agri-food research and in addition, DAFM, Teagasc and SFI are all now partnering with the Irish Research Council's Employment-based post graduate scheme in an effort to encourage a greater level of research activity at company level especially among SMEs.</p> | D |
| Sector : | Current : | 2020 Target | | | | | | | | | | | | | | | | | |
| Beverages/Bakery: | 0.5% : | 1% | | | | | | | | | | | | | | | | | |
| Dairy Functional Foods: | 0.5% : | 1% | | | | | | | | | | | | | | | | | |
| Consumer Foods : | 1.1%: | 2% | | | | | | | | | | | | | | | | | |
| Primary Meats: | 0.5%: | 1% | | | | | | | | | | | | | | | | | |
| 38 | A well coordinated approach by all the key players, both State and private, will be essential to achieve the objectives outlined in this strategy. Consideration should be given to establishing a high level forum or group, led by DAFF, which could facilitate joined up action, act as a “clearing house” for any issues that arise, and recommend any adjustments to the strategy in light of experience. It is important that any such group should have the highest possible level of both political and industry support. | DAFM | A High Level Implementation Committee, (HLIC), chaired by the Minister was established in Sept. 2010 to ensure a coordinated State response to achieving the FH2020 targets. It also act as a clearing house for issues that arise. It involves the CEOs of all relevant state agencies and generally meets bi-monthly. Close engagement is also maintained with Industry which have attended HLIC meetings on specific issues. A summary of progress already achieved is set out in the "Milestones for Success", "Milestones for Success 2012 " and "Milestones for Success 2013" reports. Of particular significance is that the stretch interim milestones set for end 2013 have largely been met The 4th progress report will be published shortly and will continue the successful implementation process. Specific 'Clearing House' issues which have been addressed are funding, the beef forum and strategies for the PCF and whiskey sectors. | B | | | | | | | | | | | | | | | |

| 3.4: Environment | | | | |
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| 39 | DAFF should continue to recognise and support the important contribution of family farms and enterprises to the provision of environmental public goods | DAFM | <p>The contribution of farming to environmental public goods is a central theme of the EU Commission and was central to the outcome achieved on the CAP post 2013 negotiations, see recommendation 3 above.</p> <p>Ongoing financial support is provided to over thirty thousand farmers implementing their 5 year environmental plans under REPS and a further fifteen thousand under AEOS. Funding of €337 million was provided in 2011 for REPS and AEOS, while . funding of €243 million has been provided in 2012 for REPS (€185M) and AEOS (€58M), while 2013 payments under REPS amounted to €146.5M.</p> <p>A new round of AEOS, a new measure to enhance environmental public goods, was rolled out in 2011 and close to 7000 applications were received. The total allocation for the new scheme is 25 million euro per annum and the maximum payment to farmers will be 4,000 euro per annum. These limits are required in order to adhere to the expenditure ceilings set out in the National Recovery Plan 2011-2014. AEOS 3 was reopened in 2012 with a budgetary allocation of €20m. Around 9,700 applicants were received and 6,000 have been accepted into the scheme with an upper budgetary limit of € 4,000 per farmer to remain within DAFM agreed expenditure ceiling. Under all AEOS schemes, payments of €58.1m issued in 2013 .</p> | B |

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| 40 | Continued investments in research should be made to develop technologies and approaches required to make Ireland a world leader in the sciences related sustainable agricultural and food production. | All | <p>See also 44 and 106.</p> <p>The food industry is actively working to continue reducing the levels of food waste from manufacturing. Between 2004 and 2008, the latest available figures, waste arising from food manufacturing has reduced by 46%. Through REPAK, the industry funded initiative, packaging recovery increased to 74% from 70% in 2009, well in excess of the 60% EU packaging recovery target for 2011 while packaging recycling rate of 66% is up from 65% in 2009, but more importantly Ireland has met and exceeded the EU (2011) specific material recycling targets</p> <p>Teagasc has a substantial research programme on Environment Soils and Land Use, which includes research on Nutrient Efficiency, Water Quality, Greenhouse Gases, Soil Quality and Classification and Agro-Ecology. The main objective of this research programme is to ensure compatibility and synergy between Food Harvest 2020 targets and the environmental targets specified in EU legislation (e.g. Nitrates Directive, Water Framework Directive, EU CHG 2020 Proposals, GAEC, Habitats Directive). It has initiated Working Groups on the Water Framework Directive and on Greenhouse Gas Emissions to facilitate a comprehensive multi-disciplinary approach to research and knowledge transfer on sustainable production.</p> <p>Another important approach to sustainability is illustrated by Origin Green which was launched in June 2012. It is a voluntary sustainability programme which works at farm and industry level. The heart of industry Origin Green is a Sustainability Charter, whereby Irish food and drink manufacturers commit to reducing energy inputs, minimizing their overall carbon footprint, and lessening their impact on the environment. Participating manufacturers develop a plan with targets in areas such as emissions, waste, water and biodiversity and progress in key action areas will be reported on annually. Action plans are then verified by world leading verification inspection experts SGS Group to ensure targets are robust. This provides the verifiable evidence that retailers and foodservice providers around the world are seeking. Currently almost 65% of food and drink exports are made by companies who are verified members of Origin Green and the intention is to increase this to 75% by end 2014.</p> <p>At farm level, 50,000 sustainability assessments which have been accredited by the UK Carbon Trust have been undertaken by beef and sheep farmers, while the recent launch of the industry approved Sustainable Dairy Assurance Scheme will bring all dairy farms into the scheme over the coming 18 months. Its national scope and link to the quality assurance schemes makes it a world's first.</p> <p>DAFM has actively invested €75m euros over last 3 years, in this type of research, through its competitive research funding programmes (Stimulus, CoFoRD & FIRM). Research is focused on topics identified in the strategic research agendas Food Research Ireland, SSAPRI and the one being developed by a COFORD Council Working Group. An Agricultural Gaseous Emissions Research Initiative was funded in 2011 and the Stimulus element of DAFM's 2011 Research Awards also includes a number of relevant topics and more recently DAFM's Call 2013 contains topics of relevance to this area.</p> <p>In addition "Sustainable Food Production & Processing" is 1 of the 14 prioritised areas for future funding under the D/JEI + Forfas sponsored National Research Prioritisation Exercise (NRPE). DAFM is championing the implementation of the Action. Forest research supports the forest sector and its contribution to national socio-economic well-being on a sustainable basis.</p> | B |
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| 41 | An industry-research-agency partnership should be directed to developing a food standard based on a standardised carbon life-cycle analysis. | Bord Bia/ Teagasc | <p>Teagasc, Bord Bia and The Carbon Trust in the UK have collaborated to complete the PAS 2050 System for Life Cycle Analysis of beef production. PAS (Publicly Available Specification) 2050, an international standard, has been developed in response to a desire for a consistent method for assessing the life cycle GHG emissions of goods and services. A carbon footprint calculator for beef was certified and approved by the Carbon Trust in 2011 and this was followed by a similar certification for dairy in 2012. This work is now being extended to incorporate water & biodiversity measures. This has enabled Bord Bia to incorporate an objective assessment of sustainability into its Quality Beef Assurance Scheme in which 32,000 beef farmers participate.</p> <p>Teagasc and Bord Bia have launched a Beef Carbon Navigator tool, which focuses on assisting farmers to adopt technology which leads to improvements in the emissions and financial performance of their enterprise. A similar tool is being prepared as part of the National Dairy Sustainability and Quality Assurance Scheme.</p> <p>The scope of the sustainability measures being covered by Bord Bia is now being extended to cover meat processing with PAS 2050 certified footprint models completed to date for beef and poultry processing with pigmeat and lamb version expected to be completed by the end of 2013. Farm level models are also being completed for each meat species. The focus of the sustainability initiatives currently being undertaken is to broaden their coverage to incorporate issues such as water, biodiversity to allow Ireland demonstrate its credentials in this area. Ongoing collaboration between agencies will be critical in this regard.</p> <p>Teagasc is involved in a multi-country project, LEAP (Livestock Environmental Assessment and Performance Partnership), which is led by the FAO and is developing internationally agreed methodologies to assess the environmental performance of livestock production systems, including greenhouse gases and water. This project started in 2012. This is important to ensure the methodologies used by Teagasc/Bord Bia is in line with internationally agreed methodologies, and that these methodologies adequately deal with our unique grass-based systems.</p> <p>An EI team is working with Bord Bia & SEI on identifying innovations to support an industry focus on sustainability and an industry Food and Drink Sustainability Forum has also been established to deal with issues relating to environmental sustainability through the food and drink industry supply chain.</p> | B |
| 42 | Teagasc must ensure that farmers are given the appropriate advice and information, based on quality research, to enable them to refine their production methods to reduce carbon intensity and further improve environmental performance. | Teagasc | <p>Teagasc's 234 advisors have contact with some 80,000 farmers and rural dwellers annually, of which over 40,000 avail of Teagasc's intensive farm advisory service including improvements to environmental sustainability.</p> <p>Teagasc is actively involved with the carbon measurement at farm level undertaken as part of the Bord Bia Beef and Lamb Quality Assurance Scheme. More than 50,000 sustainability assessments, which are accredited by the Carbon Trust, have been undertaken to date. A Carbon Navigator tool (a feedback and advice tool) was launched by Teagasc and Bord Bia in 2013, to help individual farmers improve their environmental and economic performance. In 2014, these beef and lamb initiatives will be augmented by the Sustainable Dairy Assurance Scheme. Also, it is anticipated that a Carbon Trust accredited footprinting methodologies and models for the pig, poultry, grain and horticulture sectors will be completed and rolled out by end 2014</p> <p>Teagasc is also involved in Agriculture Catchment Programme set up to provide the scientific evidence base for agricultural policy with particular reference to responsibilities under the EU Nitrates Directive and the EU Water Framework Directive. Over 300 farmers, including intensive dairy farmers, are participating in six catchments study areas where changes in nitrogen and phosphorus in the soils and waters are monitored over time as well as the impact of mitigation measures. Phase 2 which began in 2012 will continue for a further four years.</p> <p>Using the National Farm Survey, Teagasc has developed a set of farm level sustainability indicators for Ireland which can be used to monitor trends over time.</p> | B |

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| 43 | DAFF and Teagasc should investigate further the carbon sequestration potential associated with afforestation. | DAFM | <p>The COFORD funded CLIMIT programme which was completed in early 2012 has provided updated emission factors and tools needed for accurate reporting of forest carbon stock change to UNFCCC and the Kyoto Protocol. The work has also provided more accurate estimates of long term uptake and release of carbon under different afforestation scenarios. A new project – CforRep based at UCD - is being funded by DAFM to obtain better estimates of the effects of disturbances and deforestation on forest stock change, as well as soil carbon.</p> <p>In line with the United Nations Framework Convention on Climate Change (UNFCCC) decision on land use, land-use change and forestry (LULUCF) agreed at Durban at the end of 2011, and the new EU Decision on LULUCF, reporting on forest carbon now extends on a mandatory basis to cover all forests, both pre- and post-1990. A contract has been awarded by DAFM to carry out the reporting is work in accordance with the UNFCCC and EU requirements.</p> <p>The National Forest Inventory (NFI) is a key data source for carbon stock change estimation. Following the recruitment of temporary staff the second phase of the NFI was completed on schedule at the end of 2012. Information from the inventory will be used to finalise forest carbon stock change estimations for the period 2008-2012 (the Kyoto first commitment period) and for future reporting requirements as outlined.</p> <p>Current research by Teagasc includes determining the factors that affect the growth and yield of tree species on specific sites, and differing landuse types. Research also addresses how environmental, biological and management practices and climate change affect forest ecosystems and productivity. Other research involves developing assessment and quantification techniques on the potential of forests to reducing fossil fuel consumption.</p> | C |
| 44 | DAFF and Teagasc should continue to support the agricultural mini-catchment programme beyond 2012. | DAFM | <p>Teagasc operates the Agricultural Catchments Programme, which evaluates the efficacy of environmental legislation (specifically the Nitrates Directive) on farm practices and environmental sustainability. Phase 1 of these innovative on-farm catchment development studies concluded at the end of 2011 and DAFM has committed to fund Phase 2 of the Programme for a further 4 years up to 2015. Phase 2 is now being implemented in the Programme's six catchments with the participation of over 300 farmers and the collaboration of Teagasc research and KT colleagues.</p> <p>The Phase 1 Report, published in June 2013, details the outcomes on the first 4 yers and summarises the results from published scientific papers. The programe is increasing the knowledge of nutrient transfers from the agriculture sector.</p> | A |
| 45 | DAFF, in conjunction with industry, should improve the environmental management of our waters, both coastal and inland, to protect the sector and its image. | DAFM | <p>Payments under Direct Payment Schemes are underpinned by on-the-spot environmental inspections covering groundwater, nitrates and the use of sewage sludge on farms. Some 1,300 applicants under the Direct Payments Scheme are selected, using risk analysis, for inspection annually for adherence to these legislative requirements. Targeted water quality and nitrate inspections on behalf of other agencies on some 1,650 farms are also carried out annually. REPS and AEOS also continue to protect waterways though their compulsory and optional measures. The EPA report on water quality notes that there was a general reduction in phosphate and nitrate concentrations compared with the previous period which has been attributed to increased rainfall, reductions in inorganic fertiliser usage, improvements in organic fertiliser storage and the implementation of land-spreading restrictions (Water Quality in Ireland 2007-2009, EPA 2010).</p> <p>See 44 above on the agriculture catchment programme which has a specific interest in water quality. Also, an environmental impact assessment on the potential impact on water quality on the implementation of FH2020 has been completed and presented to the Food Harvest HLIC. The outcome is that the report's conclusions will be mainstreamed into the work of the HLIC and taken into account under the revised CAP provisions for 2014-2020. This will include revision of Pillar 1 baselines (GAEC and SMR) and the integration of biodiversity, climate and water quality actions and initiatives under various RDP measures.</p> | B |

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| 46 | DAFF, in consultation with other relevant parties, to lead Irish involvement in related international research activities such as the Joint Programming Initiative on "Agriculture, Food Security & Climate Change" and in the NZ-led Global Research Alliance of Agricultural Greenhouse Gases | DAFM | DAFM and Teagasc is represented on the Governing Boards of the two activities mentioned with input guided by a Steering Committee chaired by the Chief Inspector. Ireland is a founder member of the Global Research Alliance on Greenhouse Gases. This international body pools the resources and knowledge of all interested countries on greenhouse emissions reduction and focuses on practical mitigation technologies at farm level. The Alliance was formally launched at the signing of the Charter which took place in Rome in June 2011. Ireland participates in the work of the GRA Reserach Groups via Teagasc & EPA personnel. Teagasc also participates in an FAO project on benchmarking environmental performance of livestock production systems, which is jointly funded by DAFM and Teagasc. In January 2013, an international multi-partner Call on Mitigation was launched by 11 countries of the JPI - Agriculture, Food Security & Climate Change as well as Canada, New Zealand and the United States. DAFM has contributed €415,000 to fund Irish participation in this Call. The outcome of this Call process was published in late 2013. Irish researchers will participate in two research projects, the majority of the funding will be focused on project looking at methane production in the rumen of livestock. This project will be coordinated by Teagasc Grange and also has involvement from UCD in addition to a number of international partners including a partner from New Zealand. | A |
| 47 | Establishing sustainable commercial value from wild marine aquatic resources should be a key objective of the sea fisheries sector. | Industry | <p>See also action 188 and 200. Establishing sustainable commercial value from wild marine aquatic resources is a key objective of the sea fisheries sector.</p> <p>As part of its Programme for delivery of a fully certified Standard for seafood incorporating quality, environmental responsibility and traceability, BIM, in conjunction with SFPA and the seafood industry, are actively involved in the introduction of full product traceability for the wild fish catching sector. This project now delivers full traceability at key national fisheries co-operatives and is being extended to the wider seafood sector during 2014. The scheme, will ensure compliance with EU Regulations and will provide a level of traceability, while complementing BIM's ISO 65 EN45011 environmental standard.</p> <p>Bord Bia promotes the unique selling points of sustainable Irish seafood through its market development and promotional programme in the core European seafood markets as well as in emerging seafood markets in Asia, Russia and the Middle East. It maintains an extensive presence at a number of International Trade Exhibitions in key export markets, e.g. in 2014 to date at Germany (Biofach February 2014), Brussels Seafood Show in May 2014 and at PLMA, also in May 2014. It will have an extended presence at the China Fisheries Show in November 2014, the 2nd largest seafood show globally and largest for the Asian market. It will also have an Ireland Stand at the Conxemar seafood show in Vigo in October 2014. In addition, promotional events such as media visits with international trade and consumer press press (e.g. France's Produits de la Mer, German seafood trade magazine 'Fisch magazin') in-store tastings (e.g. in French and Chinese markets) and on line seafood promotions and wholesale trade promotional events (China) are ongoing. Bord Bia is also actively working with the seafood sector on Origin Green, and to date, almost 20% of fully verified members are from within the seafood sector.</p> | B |
| 48 | Industry, in conjunction with relevant State bodies, should examine options with regards to the development of sustainability related marketing standards for Irish food in relation to conservation grade food. | Industry | Currently the Dept. and its state agencies are focusing scarce resources on underpinning certified organic produce and on developing broad sustainability standards for a range of products, see 41 above for details on this project. The option of conservation grade food is not currently being considered by the State. | D |


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| 49 | DAFF should develop pilot projects and a pilot forum on renewable energy, including a regional anaerobic digester for farm and industry waste should be initiated. | DAFM Teagasc | <p>Anaerobic Digestion is one of a number of areas of bioenergy being examined by both DAFM and DCENR in the context of developing a National Bioenergy Strategy. In 2007 DAFM approved grant-aid of €400k each for the development of ten on-farm digesters under the Scheme of Investment Aid for Demonstration of On-Farm Waste Processing Facilities, with grant-aid payable only on completion of the work concerned. Since the granting of approval just one grant of €400k has been drawn down. This low level of completion is one factor being considered in the review of AD as part of the consideration of bioenergy policy to 2020. The REFIT III tariffs introduced by D/CENR in January 2012 provide support for AD (CHP and non-CHP) indexed and offered on a 15 year basis.</p> <p>Teagasc as part of its Green Policy is investing in a number of demonstration projects on biomass-based renewable energy. It has already installed a boiler capable of burning miscanthus and other feedstocks at Johnstown Castle. Teagasc is also involved in researching the agronomics of growing bioenergy crops at its Oak Park campus. At the same site it has recently installed a CHP plant based on biomass which is the first of its kind in Ireland and is being used as a demonstration facility. In 2012, Teagasc invited an expert from the US Department of Agriculture to review its research and innovation programmes in this area and his report, including recommendations, was submitted to Teagasc in August 2012. Teagasc plans to develop an AD plant at Grange which would include a grid connection. Work is expected to commence in 2014 and be completed and commissioned by the end of 2015.</p> | C |
| 50 | DAFF should continue to work with relevant Departments, Bodies and Agencies to address the barriers that exist to connections to the electricity grid for bioenergy products | DAFM | Matters of connection to the grid are in the first instance a matter for the Commission for Energy Regulation (CER), the independent regulatory authority with statutory functions in this regard. . Any barriers that exist are outside of the direct control of DAF and consequently it is not directly involved to any great extent. | D |
| 51 | Farm-level developments such as installation of renewable energy generators (wind/solar) should be encouraged by DAFF and DCENR | DAFM | DAFM is keen to develop this area and works closely with D/CENR and SEAI to progress the potential of farm level measures in the development of renewable energy policy. The new TAMS measures provide for installation of solar panels in high-energy production units. | D |
| 52 | DAFF should lead a strategic environmental assessment on the impact of the recommendations of this report and a coherent plan should be put in place to off set increased GHG emissions prior to implementation | DAFM | <p>This recommendation and related issues were discussed at the HLIC meeting of 22 June 2011 where it was agreed that the key issue was to determine the environmental impacts of various sectoral plans. To this end, an environmental assessment on a range of scenarios was agreed and an Environmental Analysis Steering Group was established. Following a competitive public tender process, a contract was signed in April 2012 with the Consultants appointed to carry out the task. A public consultation process was facilitated on the original Terms of Reference, which ran from May to July 2012. An interim report was presented to the HLIC in September.</p> <p>Following discussions with the European Commission's DG Environment, the terms of reference were recast and expanded and the consultants presented a draft report to the HLIC in May 2013. Following a further eight week public consultation, the final report was completed and presented to the Food Harvest HLIC in January 2014. The outcome is that the report's conclusions will be mainstreamed into the work of the HLIC, future Milestones and similar reports must take this report into account. Already DAFM's response is reflected in the greening elements of the CAP and the draft RDP for 2014-2020.</p> | B |

| 3.5: Customers | | | | |
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| 53 | <p><i>Credibility is key if the potential identified in market and consumer trends are to be realised. Key steps necessary to progress the development of a Brand Ireland include:</i></p> <ul style="list-style-type: none"> • Government action in articulating, advocating and getting sectoral buy-in for a 'green' model for Ireland. | To decided when 'green model' is more advanced | <p>To date, there has been strong Government backing and considerable evidence of sectoral buy-in for the key messages of FH2020. It has been accepted that the development of a green model will take a 3-5year timeframe. A firm foundation is being built, see actions following. This message is continually emphasised in ministerial statements, press releases, etc, which highlight the need to improve environmental awareness amongst farmers and the message that achieving markets returns are likely to depend on the demonstration of enhanced environmental awareness. Evidence of sectoral buy-in to a 'green model' for Ireland is evidenced by the level of industry interest in Origin Green and farm level involvement in the Bord Bia/ Teagasc sustainability programme. Since the launch of Origin Green to the Irish industry in June 2012 more than 300 food and beverage companies have registered their interest in Origin Green and 65% of our exports now come from verified members of the Origin Green Programme. In addition the participation of all Quality Assured beef farms in voluntary sustainability measurement (in animal welfare, carbon, energy, water conservation and biodiversity) as well as the commencement of the Sustainable Dairy Assurance Scheme across 18,000 dairy enterprises shows the level of commitment in building and supporting data measurement for sustainability management at producer and processor level. Importantly the international business to business marketing communications campaign is shifting "from promise to proof" to communicate the tangible, measurable actions in order to show the credible reality of the Origin Green programme to international customers</p> | B |
| 54 | <ul style="list-style-type: none"> • A sustainability audit of Irish agri-food with particular reference to grass-based rain fed livestock production, for use as a benchmark against competitor suppliers. | Bord Bia Teagasc | <p>State Agencies have actively collaborated on the development and implementation of a sustainability programme across primary and secondary production. In 2010, a pilot sustainability audit was conducted on 200 beef farms by Bord Bia in conjunction with Teagasc and the Carbon Trust to benchmark the carbon footprint of Irish beef production. The carbon footprint of all pilot farms has been determined using a Teagasc developed carbon calculator. The model was accredited to PAS 2050 by the Carbon Trust in the first quarter of 2011. Subsequently, a simplified programme, extended by water and biodiversity elements, has been rolled out, on a voluntary basis, to the 32,000 beef producers participating in the BLQAS. This includes a feedback programme allowing participants to share results and suggest areas for improvement.</p> <p>In 2011, a pilot sustainability audit was conducted on 110 Glanbia dairy farms by Bord Bia in conjunction with Teagasc and the Carbon Trust to benchmark the carbon footprint of Irish dairy production. The carbon footprint of all pilot farms has been determined using a Teagasc developed carbon calculator. The model was accredited to PAS 2050 by the Carbon Trust in the first quarter of 2012. Bord Bia launched the Sustainable Dairy Quality Assurance Scheme in December 2013. Audits are now being carried out on dairy farms and feedback to farmers is now commencing</p> <p>Teagasc now has the capacity to measure carbon emissions on a farm basis for all of the farms in the Teagasc National Farm Survey (NFS). In turn this sample of farms can be weighted up to reflect the total farm population represented by the NFS. In 2013 Teagasc published farm level emission estimates using the 2012 NFS data. The next stage of the work will involve calculating the emissions for earlier years as well as providing emissions estimates for 2013. Teagasc is also introducing a capacity to measure the carbon footprint of agricultural products using the National Farm Survey. To date the carbon footprinting methodology has been applied in respect of milk, with the next stage being the development of carbon footprinting for beef.</p> <p>Bord Bia in conjunction with Teagasc have developed the Carbon Navigator which is being extended to dairy and beef farmers to adopt. Farmers using these tools will be able to identify the impact both environmentally and financially of reducing their environmental footprint. More than 90% of beef is produced from Quality Assured certified farms. Bord Bia has begun work on developing an accredited carbon footprinting model for Irish lambs. Similar projects have been completed for the pig and poultry sectors.</p> | B |

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| 55 | • Teagasc-led scientific research which underpins Ireland's sustainability claims and validates the environmental and nutritional benefits of grass-based rain fed production. | Teagasc | Teagasc has a significant programme of research which supports Ireland's sustainability claims. This includes Life Cycle Analysis of our main grass-based dairy and beef enterprises which had quantified their low carbon footprint. Other research which is being used to identify practical measures to reduce the footprint even further, see 54 and 41 above. including the tracking of national carbon footpring using the National Farm Survey. Information has also been generated which supports the high health status of beef and milk from grass-fed animals in term of the high content of conjugated linoleic acid (CLA), a bioactive compound with anti-carcinogenic properties. Teagasc will broaden its grassland research activity to validate environmental and nutritional claims. | B |
| 56 | • Bord Bia-led research clarifying the consumer relationship with sustainability issues. | Bord Bia | Bord Bia has been conducting a broad range of consumer research since 2001 using its PERIscope (Purchasing and Eating in the Republic of Ireland scope) sampling themes which includes environmental issues. In parellel, as part of the six country consumer research into developing Origin Green, Bord Bia further explored the consumers relationship with sustainability issues. On an ongoing basis, Bord Bia monitors the consumer's relationship with sustainability through its Consumer Lifestyle Trends research in 40 countries (covering more than 28,000 respondents), in particular the "Responsible Living" trend (which specifically looks at their relationship with the environment) and the "Quest for Health and Wellness" trends (which includes the social dimension of sustainability). Other research also checks how consumers' relationship with sustainability issues is evolving (e.g. the PERIscope study in 2013 which covered ten markets including the Republic of Ireland. | B |

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| 57 | <p>• An industry-led focus on research and innovation in areas of health and wellness as a means for growth in a mature EU market</p> | <p>Industry DAFM</p> | <p>FDII in conjunction with FSAI has formally coordinated salt reduction across a number of food categories. Successful work has also been done in relation to transfat removal, saturated fat reduction and implementation of Guideline Daily Amount consumer information on the majority of branded and private label products. The food industry established and funds the Nutrition and Health Foundation which is a multi-stakeholder approach (industry, State, internationally recognised scientists, health professionals) to encourage a healthier society by highlighting evidence based information on nutrition, health and physical activity. Industry welcomes closer collaboration between industry groups and State Bodies on this issue and a better link in with initiatives in other EU Member States</p> <p>DAFM addressed this issue in "Food Research Ireland" - the Strategic Research Agenda (SRA) prepared by the Industry-led Food Research Expert Advisory (FREIA) Group. This is now being used to guide the content of Calls by all research funding programmes. DAFM have made research awards in the areas of health and wellness over the last number of years, including the co-funding of awards with the Health Research Board on the Food Health Research Initiative (FHRI). This initiative includes large research projects such as Eldermet, Safe and Healthy Foods and both the National Food Consumption and Nutrition Phenotype Databases. At EU level, research into health and wellness is facilitated through DAFM's active involvement in the EU Joint Programming Initiative- "A healthy diet for a healthy life". At EU level, research into health and wellness is facilitated through DAFM's active involvement in the EU Joint Programming Initiative- "A healthy diet for a healthy life". "Food for Health" also emerged as 1 of the 14 prioritised areas for future funding under the D/JEI + Forfas sponsored National Research Prioritisation Exercise (NRPE) in 2011. An Action Plan to give effect to this has been developed and DAFM is now tasked with championing its implementation. This work was initiated at the May 2013 Prioritisation Action Group (PAG) and is ongoing.</p> <p>This action is also being advanced through the EI funded Food For Health Ireland initiative which is a unique research project combining the resources of EI, UCC, UCD, UL, Teagasc in partnership with 4 dairy companies Kerry, Glanbia, Carberry and Dairygold in discovering and commercialising the functional components within milk. Funding for a second phase of FHI (2013-2018) was approved by the EI board in February 2013 and the programme is now focusing on commercialisation of the outputs from the first term of FHI. Since then 7 contract research projects with the current industry partners have been completed and another 3 are in the proposal stage. - 2 projects with global food companies (i.e. non FHI industry partners) have also been completed; 5 Invention Disclosure Forms (IDF's) have been submitted to the PRO Technology Transfer Offices and 3 patent applications have been submitted.</p> <p>The development of a Dairy Technology Centre is on track. A national call for proposals has been finalised and the centre should be underway by year end.</p> <p>Teagasc has embarked on a major initiative with IDB to generate a wide range of new cheese innovation for the Irish dairy industry, this centre for cheese innovation was launched in July 2011, see 73 following. Other collaborative programmes with which Teagasc is involved include the Alimentary Pharmabiotic Centre (APC), NUTRAMARA, ELDERMET and INFANTMET while Nutramara has active participation from the marine seafood industry.</p> | B |
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| 58 | <p>• Industry-academic development of market knowledge and language capabilities which will help expand market share in key locations. The Bord Bia Marketing Fellowship Programme provides an example of this.</p> | <p>Bord Bia Industry Institutes</p> | <p>Bord Bia's Marketing Fellowship has been refined and developed to attract talent into the industry with a particular focus on language and market development capabilities. Industry involvement and take-up has been very positive. Fellowship 1, which concluded in September 2010, assisted 2/3rds of the participating companies to expand their market reach and also provided valuable market insight. Data indicates that contract of over €2.5 million resulted from this tranche. Fellowship 2 (25 fellows) undertook 100 assignments on behalf of 80 companies in 12 overseas locations. This programme which concluded in September 2011, assisted 2/3rds of the participating companies to expand their market reach and also provided valuable market insight. It is estimated that contracts of over €7.9 million resulted from this programme. Fellowship 3 (26 fellows) which concludes in September 2012 undertook 106 assignments on behalf of 80 companies in 12 overseas locations. Fellowship 4, which commenced in June 2012 involved 25 experienced executives undertaking 100 commercial assignments in 14 markets (8 European and 6 International). The fifth cohort of this programme (20 fellows) completed 74 commercial assignments and presented final reports to 55 companies in June 2014. The sixth cohort (21 fellows) has been recruited and commenced the academic programme in June. The geographic spread of the programme has been widened to include Canada for 2014/15 following the successful conclusion of the Canada-EU trade agreement (CEPA). Also the Strategic Growth Programme (Food) which commenced in December 2010, will complete its 4th programme iteration in June 2014. This part time executive development programme is run in conjunction with the Smurfit Business School and is geared towards developing senior management's strategic business development skills by progressing a major in-company assignment. This programme has had four intakes (123 participants). Bord Bia's 18-month Food Marketing Graduate Programme developed in collaboration with IBEC and DIT commenced in July 2011 with 12 graduates placed with 12 food exporting companies in 8 overseas locations. It took in its second cohort in January 2013 and incorporates an internationally recognised postgraduate diploma in International Business Development. A third cohort of this programme is currently being recruited and will commence in July 2014. In September 2013, Bord Bia built on the success of the Marketing Fellowship programme by launching the Origin Green Ambassador programme. Ten Origin Green Ambassadors commenced this 23 month Masters Degree in Business Sustainability. In the period January to June 2014, these Ambassadors undertook successful placements in 10 global food and drink companies including Abbott Nutrition, Walmart, Coca Cola, Fair Oaks Farms, the World Wildlife Fund, Tesco, Marks & Spencer, PepsiCo, Subway, McDonalds and Metro.</p> | A |
| 59 | <p>• Processors continuing to build strategic partnerships along the supply chain, particularly with retailers.</p> | <p>Industry</p> | <p>Meat processors have already made substantial progress in developing closer relationships with retailers on the domestic market, in the UK and across the EU. Specific examples would include the contracts between Dawn and McDonalds and between Kepak and Budger King where specific requirements are met on an ongoing basis. A major dairy co-operative has introduced a voluntary three year fixed price milk contract for 2011-2013, where participating suppliers are given a fixed price, adjusted for milk constituents and indexed for farm input costs. The aim is that the scheme will cover around 10% of their milk supply pool. Some food processing companies have initiated discussions with a German supplier to simplify the supply chain. Under their Supplier Development programme, EI in conjunction with Musgraves links up smaller food companies with distributors and retailers and improve awareness of the retailers trading requirements on quality, delivery, procurement, etc. Bord Bia has developed its Food Academy, run through the LEO's to assist start-up companies gain an entree with retailers and they also have built up a relationship with Tesco to allow suppliers gain knowledge of requirements of large retailers on delivery, standards and safety. Industry strongly supports efforts to ensure fairness in the relationships between suppliers and retailers by introducing a compulsory grocery code of practice in Ireland. The Competition and Consumer Protection Bill, 2014 published by the Minister for Jobs, Enterprise and Innovation provides the Minister with powers to make regulations relating to certain practices in the grocery sector and provides for associated sanctions and investigation and enforcement powers. The Bill has reached Report Stage and is expected to be enacted shortly.</p> | B |

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| 60 | <ul style="list-style-type: none"> Investigation of possible linkages with Tourism Ireland in marketing of Ireland | Bord Bia Tourism Irl. | <p>Ireland's image as a fresh, natural food producer has strong potential to assist in the marketing of Ireland as a tourism destination. Bord Bia inputted a draft food tourism strategy into the development of a national food tourism strategy by Failte Ireland. Following its launch in December 2010, Bord Bia acts as lead partner in the messaging of the Failte Ireland strategy. As part of this role, Bord Bia presented its findings on Brand Ireland for food with EI, IDA, Tourism Ireland and Failte Ireland in May 2011 and has conducted an online competition across 6 markets drawing entries from 115,000 people and held a tasting of Irish food for 1000 tasters in Paris. Bord Bia has collaborated with Dublin City Council assisting Dublin City Council with the marketing and promotion of Food and the City including delivering the food component of their Dublin Design Bid.</p> <p>The role that food tourism can play is recognised in the Origin Green concept and by the recently appointed Origin Green Ambassadors.</p> <p>Having investigated the benefits of a linkage between tourism and food, DAFM submitted a proposal to D/TTS in 2013 on the role that this Department and its agencies could play in developing an agri-marine- food centred project using the Wild Atlantic Way (WAW) as an initial test bed. The objective is to interlink the Wild Atlantic Way, or other tourist trail, with a range of high quality food and farm tourism related activities and experiences. From this Department's perspective, the project would raise the overall brand image of Ireland and most importantly support and encourage entrepreneurship and employment in rural areas. A formal response is awaited.</p> <p>A promising initiative of substance in this area is the interdeprtmmental government commitment that Origin Green should be the leading theme for Ireland's participation at EXPO Milan 2015 - Feeding the Planet, Energy for Life. this will see the Origin Green theme leading the Ireland Inc. presentation to in excess of 27 million consumers potentially inviting them to visit rural Ireland, The Wild Atlantic Way and the home of sustainable food.</p> <p>These proposals and similar linkages were again recently proposed to D/TTS by DAFM as part of the consultation process on the development of a new tourism strategy for the 2014-2020 period.</p> |  |
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| 61 | Continued identification of target market and access opportunities through DAFF's Market Access Group, involving industry and Bord Bia. | DAFM | <p>In 2011, DAFM established an inter-agency, inter-disciplinary TradeTeam to target and facilitate trade and market access for exports of food (including seafood), beverages, genomics and live animals and to develop mutual co-operation with trading partners. The long standing Market Access Group meets regularly to discuss market priorities and access issues. In 2010, 2011 and 2012, DAFM agreed certificates for beef trade with Morocco, Tunisia and Turkey and for sheepmeat with Tunisia, the Russian and Chinese markets, closed following the dioxin crisis, were re-opened for pork, for feed into Russia, the Australian market for pigmeat, the Iranian market for beef and direct export of horses to China.</p> <p>In 2013 access into third countries, was achieved for</p> <ol style="list-style-type: none"> 1. Certificates for the export of Irish sheepmeat agreed with Singapore, South Africa and the UAE 2. Export certificates agreed for poultry meat and poultry meat products to the UAE and Morocco 3. Agreement on exports of boarfish to China 4. Lifting of the Iranian ban on beef exports from Ireland 5. The removal of the age restriction on beef exported from Ireland to the UAE 6. Agreement with Serbia on export of fresh and frozen pigmeat 7. Agreement on export of horse feed to China. Export certificate also agreed. In this context Ireland is the first country to obtain access into China for horse feed. 8. Agreement on export of porcine semen to China and export certificate agreed 9. Agreement on export of horses direct to China 10. Health certificate for the export of fishery products to Hong Kong. 11. Achieving opening of new markets for live cattle in Egypt, Lebanon and Libya. <p>Minister Coveney's trade mission to China also resulted in significant political and commercial outcomes inc.</p> <ul style="list-style-type: none"> - Memoranda of Understanding (MOUs) between DAFM and the Chinese Inspection and Quarantine Service (AQSIQ) on sanitary and phyto-sanitary issues, including the setting up of a working group on SPS issues; on the export of Horse feed to China; renewal of Bovine semen protocol between DAFM and AQSIQ. - MOU with the Ministry of Agriculture on mutual cooperation in the agri-food and fisheries areas, - MOU between the Marine Institute and Chinese Academy of Fishery Sciences to build on collaborative research work already in train. - The announcement of a \$50 million project involving an Irish company, Coolmore, in a joint venture to partner China in establishing their national equine facility, the securing of further sales of horses by Irish Thoroughbred marketing and the awarding of business to a Kilkenny firm, for the export of horsefeed to China. - The signing of agreements between BIM and eight Irish Seafood companies to supply China with commercial samples of boar fish to China. - Conclusion of an agreement by Glanbia which brings to 9,000t, the volume of dairy and nutritional ingredients being supplied to the Chinese market. - Launch of new dairy products in the Chinese markets, such as Kerrygold UHT milk, a premium quality dairy product, and Glanbia's Avenol, a whey protein concentrate powder used in infant formula. | B |
| 62 | • Collaboration between DAFF and the food industry to protect and enhance the current high standards of food safety in Ireland. | DAFM | <p>DAFM and industry continues to collaborate to effectively implement the DAFM/FSAI food safety service contract. Between 2010 and 2011 over 635 meetings were held between the Department and the FSAI. These comprised liaison, working group and steering group meetings in all of the sectors included in the contract. There was also collaboration between the Department, the FSAI and the food industry through the FIRM projects. During 2012, 2013 and 2014 The Department continued to hold scheduled meetings with the FSAI to review progress under the terms of the contract and provided quarterly and annual reports. Additionally, it liaised closely with them on the investigation and close out of food incidents notified on the Rapid Alert System for Food and Feed (RASFF) as well as food safety complaints. Specifically in 2012, DAFM investigated 19 food complaints and 5 rapid alerts on behalf of the FSAI. These ranged from mislabelling of a product, the presence of a foreign body in packaged food to the presence of an unacceptable level of bacteria in a food, e.g. listeria in cheese. These investigations were in addition to the normal monitoring of food to ensure that the maximum acceptable level of residues is not exceeded. No adverse reports have been received from the FSAI on DAFM's implementation of its contractual obligations</p> | B |

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| 63 | <ul style="list-style-type: none"> Continuous improvement and operation of the highest standards of animal health and welfare by livestock producers. | Primary Producer AHI | <p>See also Recommendations 12, 121 and 123. Other collaborative initiatives being undertaken by AHI include:</p> <ul style="list-style-type: none"> - Coordination of work with DAFM laboratory services and private diagnostic laboratories to ensure diagnostic tests are delivered to ISO17025 standard. - Development, in conjunction with ICBF, of a database for non-regulated endemic diseases. When fully developed, this database will, for the first time, provide a central repository which will allow evaluation of progress of all co-ordinated programmes on a national basis. - Participation in a multidisciplinary research consortium bid to investigate improved diagnostic methods, on farm control strategies, and economic drivers for the control of Mycobacterium avium subsp. paratuberculosis (causative agent of Johne's disease) on Irish farms. <p>ICBF, AHI and Teagasc, are working with key industry partners to develop new genetic evaluations for a range of health and disease traits. Data flows have been established with key industry stakeholders, including milk and meat processors and animal health laboratories. Further genetic analysis underway with a series of "priority" traits identified, including; TB, BVD, Johnnes, IBR, liver-fluke, female fertility, mastitis, lameness, calf scour & calf pneumonia.</p> <ul style="list-style-type: none"> - New beef data program being developed in conjunction with DAFM, with additional focus on two new traits in the suckler herd (calf scour and calf pneumonia). New data recording systems being developed in conjunction with stakeholders, to promote recording of health and disease data on farms. <p>Significant and consistent work undertaken by DAFM has resulted in lower animal disease levels, particularly TB, Brucellosis and BSE. A series of animal welfare measures has also been implemented including the enactment of the 2013 Animal Health and Welfare Act, new Horse Regulations, a review of the Control of Animals Act, dog micro-chipping and financial and operational support for a number of animal welfare organisations.</p> | B |
| 64 | <ul style="list-style-type: none"> It must be recognised that the development of a persuasive and widely recognised Irish brand will require significant investment in time, effort and funding. It is therefore recommended that a steering group should be established to oversee the development of the brand and to report regularly to industry, producers and government on progress. This group should develop a realistic plan for the gradual development of the brand over a three to five year timeframe with clear milestones and benchmarks and a feasible funding arrangement | Bord Bia | <p>Bord Bia has taken a lead role in the development of a "Brand Ireland concept" for food. Following extensive consumer research and piloting in 2010 and 2011, Origin Green was developed as a brand and launched to industry in June 2012. To date more than 300 companies have registered their interest in Origin Green and 55 firms are fully verified members. These 55 firms account for 65% of our food and drink exports. The target to have 75% of exports as verified under Origin Green remains for the end of 2014. Origin Green was launched to the international trade in October 2012. Bord Bia participated in over 20 trade fairs in 2013 targeting 800,000 visitors and hosted a Sustainability Conference in September 2013 for international buyers and CSR teams. In the same year over 35 journalists visited Ireland to cover the Origin green story. Bord Bia also launched its Origin Green Ambassadors Programme with successful placements in overseas markets. Developments of a Dairy Strategy for Communicating Origin Green are in place with Bord Bia and the Dairy Sector and in June 2014 the Bord Bia dairy subsidiary board signed off on a proposed media plan for a dairy specific campaign. Bord Bia developed a 3 year creative and media strategy for Origin Green which was signed off by the Bord Bia board in December 2013. A new campaign hub website for Origin Green is in place - www.origingreen.ie and digital and traditional print marketing to a business to business audience has commenced in tandem with a set of international trade fairs, conference attendance and speaking opportunities. In addition Key journalists are visiting Ireland to continue covering the Origin Green story. A new campaign phase - "from promise to proof" is in development for launch in September 2014.</p> | B |
| 65 | <ul style="list-style-type: none"> When established, this steering group should develop a strategy to address issues such as integrating current marketing activities ('Ireland, the Food Island' 'Love Irish Food') with the proposed new brand Ireland as well as how to avoid dilution of strong existing brands. | Steering Group HLIC. | <p>The immediate priority for the Origin Green scheme is to secure a critical mass of verified members before embarking on extensive communication to trade or consumers. Nevertheless, Bord Bia is developing materials in parallel as to how the scheme can be used by member companies and integrate with their existing marketing activities. These plans will be discussed by Bord Bia's Subsidiary Boards and its Main Board as these are representative of all industry stakeholders before any formal introduction</p> | C |

| 3.6: | Value-added Food and Drink sector | | | |
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| 66 | <p>A 20% improvement in cost competitiveness relative to that of our trading partners is a priority for the food and drink sector. It must be implemented through the following;</p> <ul style="list-style-type: none"> o Where appropriate and feasible, relevant departments and agencies should seek to address structural issues with a view to ensuring reductions in the input cost base particularly in the areas of energy, transport, waste costs and the regulatory burden. | State | See 26 above | C |
| 67 | <ul style="list-style-type: none"> o Industry should avail of existing supports and focus on investment in enabling technologies and lean manufacturing, to boost productivity and unit labour costs | Industry | See also 28 above. Industry competitiveness supports are a major focus of EI. To date 160 food companies have been supported through the EI Lean programme which are delivering significant savings. | B |
| 68 | <ul style="list-style-type: none"> o Industry should prioritise the provision of management development programmes | Industry | See 28 above. To date 106 food companies have participated in Leadership 4 Growth & Management 4 Growth - the majority in L4G which is the flagship programme. Participation on these programmes has helped to raise both the ambition of the management teams but also their ability to execute. | B |
| 69 | The committee endorses the findings and the recommendations of the report of the Expert Group Report On Future Skills Needed In The Irish Food And Beverage Sector and calls for their full implementation by all relevant stakeholders. | All | See 35 above. | B |

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| 70 | Enterprise Ireland and other State bodies should target expansion of high value SMEs and other growth opportunities, including the attraction of new or additional investment from multinational companies in Ireland. | EI Teagasc | <p>Food foreign direct investment is critical for the development of the agri-food sector in Ireland. Enterprise Irelands portfolio of multi-national companies employs 10.000 people, with exports of €4 billion annually. Major international companies such as Danone, Pernod Ricard, Coca-Cola, PepsiCo, Abbott Nutrition, Ferrero, Sysco, Mondelez, Aryzta and Nestle Nutrition are already using Ireland as a base from which to service European or global markets. Enterprise Ireland's Food FDI strategy is to proactively engage with global food companies, both large and small and help them establish, profitable and sustainable businesses in Ireland. The FDI team collaborates with DAFM, DFAT and others in developing joint overseas Ministerial Missions which are a critical component in the EI development agenda and these have supported the increased food FDI output. Over the last 18 months there have been 7 ministerial missions with itineraries to USA, UK, Switzerland and the Netherlands.</p> <p>In 2010, Probiotic set up in Dundalk and Danone announced a major €50m infant nutritional expansion in Macroom, both with EI support. In 2012 and 2013 major companies eg Kerry Foods and Glanbia announced significant strategic development plans in Ireland and significant investments by both Irish Distillers and Diageo were undertaken testifying to the confidence these global players have in Ireland and to the commercial sense operations in Ireland make. 2013 was an excellent year with 8 FDI investment projects approved, with 250 job commitments, and a further 55 jobs from a project without direct financial support. As of June 2014, Enterprise Ireland approved 7 FDI investment with 252 job commitments.</p> <p>Enterprise Ireland is investing in Ireland as an investment location through funding of academic industry collaboration including Food for Health Ireland, focussed on the development of novel food ingredients with defined human health benefits. Enterprise Ireland, in partnership with the industry consortium, has committed more than €40M to the development of the Centre. An additional 2 centres, focussing on Dairy processing and meat technology are in development with industry and it is anticipated that one will launch in Q4 2014 and the other in mid-2015.</p> <p>A major collaboration in gut health is being planned between Teagasc/UCC Alliance researchers and corresponding groups at Wageningen University. The outcome will substantially add to the critical expertise at both locations with the potential to attract collaboration from companies such as Friesland/Campina, Kerry and Glanbia. See also 33 above. The collaboration on digestive health between Teagasc, CUMH, UCC and Pfizer was established in 2012 and the kick-off meeting was held on 6 June 2012. The Alimentary Phamabiotic Centre (UCC/Teagasc/CIT) has received funding for a third phase, with €36m being invested by the state and a further €14m by industry.</p> | B |
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| 71 | Encouragement of an entrepreneurial approach to the development of high potential start-up food businesses and dynamic artisan producers. | Bord Bia | <p>Established in 2012, Food Works was set up to identify and nurture export-orientated entrepreneurs who want to be part of Ireland's growing food and drink industry. Through a series of workshops and one to one mentoring, successful participants are given an invaluable range of practical business supports required to develop an initial concept into a winning food product with international appeal and global export potential. The available supports include consumer market research, business plan development, technical advice, commercial viability testing in addition to access to fast track access to research and development (R&D) facilities and possible investors and state funding. Since its creation, Food Works has seen in excess of 150 applications and a total of 43 start-ups from dairy, snacks, meat, seafood and beverages have participated in the programme.</p> <p>From Food Works 1 (2012/13), three companies are in receipt of EI HPSU supports with 2-3 in the pipeline for HPSU support from Food Works 2 (2013/4). Food Works 2 concluded on 26th June 2014 with the presentation of 5 investor ready business plans. It was the culmination of an eleven month programme that began with 48 applications of which 24 were selected for interview (inc. psychometric and intelligence testing) with 14 entrepreneurs chosen for Stage 4. Stage 4 (July-Dec) involved the completion of feasibility analyses, supports for participants included 10 group workshops on site at the Guinness Enterprise Centre, 10 individual business advisor sessions, consumer research, technical product development assistance and feasibility funding of €5,000 per participant. 11 feasibility studies were completed and presented. 5 participants progressed to stage 5 of Food Works whose main objective is to develop a financially sound investor ready business plan. During stage 5, participants attended eight Food Works workshops and completed eight advisory sessions with their appointed business advisor. All of the participating companies also availed of consumer focus groups in order to carry out their own primary research. Recruitment for Food Works 3 is currently underway with interested parties asked to register their interest online at www.foodworksireland.ie in advance of an official launch in the Autumn. The Food Works 3 programme is due to begin in January 2015.</p> <p>In addition, Bord Bia is involved the the Local Enterprise Offices (LEOs) and Supervalue on a new scheme, Food Academy Start and Advance to help artisan and local food producers get and retain shelf space in local supermarkets.</p> | B |
| 72 | The Committee endorses the recommendations in the Report of the Innovation Task Force and underlines their particular relevance to the food industry; | All | <p>See also 73. A core role of the State is to support market led innovation and R&D capabilities through as many avenues as possible. These include</p> <ul style="list-style-type: none"> • engaging in pure research, • collaborating with industry and Higher Education Institutes in developing new products, • devising and implementing improved new systems, processes and ideas, • bringing research and innovation findings to the widest possible audiences through knowledge transfer and extension services. <p>Examples of all these areas are found in this document and are instanced by the fact that DAFM has spend €75m in research funding across its 3 competitive programmes, Stimulus, FIRM and CoFoRD and has worked to secure over €38m in EU research funding</p> <p>Teagasc has a PPP with IDB and a strategic alliance with UCC and UCD and FHI is a broadly based State / industry/HEI alliance to commercialise functional dairy ingredients</p> <p>Seafood Development Centre works with around 400 seafood companies and has been actively involved in new product development.</p> <p>Bord Bia's foresight4food programme would have assisted almost 100 projects annually where companies were either looking at new products or rebranding of existing products.</p> <p>Milestones 2013 and 2014 sets out some examples of innovation undertaken under programmes run by EI, Bord Bia, BIM, Teagasc and DAFM.</p> | B |

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| 73 | Industry must prioritise investment in consumer focused innovation, new product development and development. | Industry | <p>See also 78. The recommendation is primarily addressed at industry and the Bord Bia 2013/4 report on export performance and prospects indicates that 91% of food and drink exporters report that they introduced new products in the past three years primarily variants on existing products.</p> <p>The State has extensive supports for innovation in the food sector. Bord Bia provides support for consumer focused innovation through its foresight4food programme and also partners companies in using consumer research to develop innovations on an individual basis or on a syndicated basis for smaller companies</p> <p>Teagasc support is directed at science based innovation. it has added to its capability by joining UCC in a Research Alliance to produce highly applied research information that will support the competitiveness of food companies. Teagasc supports around 300 food companies annually , many of which were around science based innovation and NPD under its Food SME Technology Support Programme. It also launched a new Food Technology and Knowledge Transfer Strategy to strengthen its existing engagement with food companies and its annual investment of around €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.</p> <p>It has also developed Public Private Partnership models to support new produce innovation. The IDB-Teagasc Dairy Innovation Centre in Moorepark, Co. Cork was launched in 2011. Its purpose is to create a pipeline of both consumer products and value added ingredients which can be marketed internationally by the IDB. Since its establishment, 300 different cheese variants have been produced and three new varieties are progressing towards market launch. In Q4 2013, IDB launched a new investment in Saudi Arabia which will involve the production of a cheese developed under the Teagasc-IDB partnership. The cheeses will use a pioneering technology developed by Teagasc which allows innovative milk protein ingredients to be recombined for fresh white cheese production. Fresh white cheese is hugely popular in the Middle East. The facility will also include an Innovation Hub for the continued development of 'white cheese' technologies. A second cheese has been commercialised with an Irish company, won a major award at an international cheese competition and the launch in Germany of this continental cheese is scheduled for the summer. Two more cheeses are highly progressed and are planned for launch in 2015. Two partnerships, one with an IMF company and one with one of our major Co-ops, are agreed and will be launched in Q3.</p> <p>Work is also advancing on the development of new fish species for human consumption and processing in Ireland. Blue whiting for human consumption is a relatively new concept. BIM's Seafood Development Centre undertook successful technical engineering trials with seafood companies to make this species suitable for processing and human consumption. Previously this product went for industrial production of fishmeal. Market development work is continuing in 2014. Ireland's Boarfish quota of 56,666 tonnes is 2/3 of the total TAC. This product has also being used for fishmeal and BIM is working with a number of seafood companies to develop some 15,000 tonnes of the product for human consumption in China and Africa by 2015. Technical work was undertaken in 2013 to evaluate prospects for producing minced products, trials to date are successfull and market options are being considered</p> | B |
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| 74 | To build on the work of the existing industry led food research committee, inter-agency collaboration is required to formalise a strategic, commercially focused research | DAFM | <p>See also 14.</p> <p>The State now has formalised its strategic commercially focused research programme under the 14 areas prioritised for funding under the National Research Prioritisation Exercise (NRPE). These are strategically linked to the FH2020 related agri-food research. DAFM is now leading 2 Priorisation Action Group Working Groups charged with implementing Action Plans for the 2 most relevant Priority areas ie. 'Sustainable Food Production & Processing' and 'Food for Health'. The NRPE also links in with the industry -EI driven Food for Health Initiative. In-keeping with the whole ethos of the NRPE these Plans have a commercial focus and deal, inter alia, with developing a framework and operational protocol for inter-agency collaboration on research funding instruments / mechanisms, impact monitoring, administration, etc. Recently Government approved new metrics and targets to monitor the impact of State investment in science, technology and innovation.</p> <p>All relevant agencies are part of the Research Prioritisation Action Group which is responsible for the implementation of the NRPE report and the Priority Areas' action plans and central to all this is a clear focus on supporting research to facilitate outcomes that will deliver sustainable economic activity and jobs.</p> <p>The Food Health Research Initiative is cofunded by DAFM and the HRB and NutraMara is cofunded by DAFM and the Marine Institute. DAFM also engage with other research funding agencies in regard to Research Calls and in the evaluation of research proposals to these Calls and other funding instruments.</p> | B |
| 75 | Bord Bia should continue in-depth consumer trend and lifestyle analysis with a focus on products that promote health and well being. | Bord Bia | <p>Bord Bia continued to monitor the Consumer Lifestyle Trend "Quest for Health & Wellness". In 2011, Bord Bia issued six updates including an analysis on fresh meat and scoped out related projects with a health and well-being. A further refresh of its Consumer Lifestyle Trends series was commissioned, published in June 2012 and set out the most recent developments and evolutions in the trends and the responses to them that have been detected in global markets. Bord Bia undertook a major project on "Healthy Aging" in 2012/3. The results have been published on its website and dairy companies were briefed in May of this year along with a variety of stakeholders.</p> <p>Bord Bia has also introduced a new web site (http://trendtrackers.bordbia.ie/) that tracks new product introductions and other food innovations identified by its overseas offices and the Fellows working overseas. These build on the trends identified in the broader Consumer Lifestyle and Trends reported in 2012 by pointing to instances where other companies are believed to be endeavouring to capitalise on such trends.</p> | B |
| 76 | Industry should double the level of resources committed to R&D activities as a percentage of turnover. | Industry | See 37 above. | D |
| 77 | Relevant bodies should focus on the improvement of commercial orientation by better targeting of research on emerging market opportunities and developing consumer trends. | DAFM | <p>See also 74 & 75.</p> <p>The three Expert Advisory Groups used to develop the Strategic Research Agendas for food, primary agriculture and forestry included significant industry representation to ensure that the research supported takes due account of emerging market opportunities and consumer trends. In addition, the Research Plus initiative in DAFM's 2013 Research Call was targeted at existing DAFM-funded projects which, with a small amount of additional DAFM funding, would deliver outcomes that could then be commercialised in the short term with the help of EI Commercialisation Programme.</p> <p>Teagasc also focuses on commercial orientations through Walsh Fellowship Scheme and through developing systems which ensure that its research activity is closely aligned with industry and developing collaborative links with industry partners.</p> | B |

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| 78 | <p>Linkages and collaboration between research institutes and industry organisations, such as Food for Health Ireland must be developed so that the activities of research institutions are grounded in the downstream requirements of a competitive food and drink industry.</p> | <p>Industry</p> | <p>A major focus of State research actions is to increase collaboration between industry and research institutes and to unlock the potential of such collaborations by establishing new industry-relevant centres.</p> <p>Food for Health Ireland is an example of this. FHI is the State/Industry/Research Institute venture, established in 2009, to develop and commercialise functional food ingredients and products to improve people's health and wellness. Funded jointly by EI and the industry the centre is dairy based and its research agenda is focused on infant nutrition, metabolic health, infection/ immunity and healthy ageing. Phase 1 concluded in 2013 with a number of new compounds emerging from the research and Phase 2, which was approved by EI in March is now focused on commercialising these compounds, see 57 above.</p> <p>EI and DAFM have been working with the dairy industry to construct a collaborative project focussed on dairy processing technology and the expertise required to support the expansion of the milk pool. 10 dairy companies have committed and good progress was made in 2013 culminating in 4 strong expression of interest proposals being brought forward by the research community and evaluated by an international panel. Following this, detailed final proposals are now taking shape with implementation of a Dairy Technology Centre is expected to commence in Summer 2014.</p> <p>An industry-led meat technology centre initiative to maximise value-adding processing in Ireland achieved buy-in from the key players in the sector in 2013. A technical facilitator was assigned to the industry group in November to challenge and refine the industry needs and the most appropriate model to deliver on them. Following this process, it is expected that a call for research proposals based on the industry's Detailed Description of Needs will be issued to the research community in 2014.</p> <p>Teagasc is collaborating with the Irish Dairy Board to promote new product development in the cheese sector, see 73 above. It also is actively involved with EI and the meat sector in a research programme to increase the value of waste streams from this sector. This complements the ongoing interaction between food companies and the Teagasc Food Research Programme which supports around 300 food companies annually.</p> <p>BIM's Seafood Development Centre provides a similar service for seafood companies. It operates a three hub value added-partnership programme through SDC in the south west, Teagasc Ashtown on the east coast, and the Letterkenny Institute of Technology in the North West. Over the past few years, around 300 companies worked with the SDC on developing a range of seafood products covering market opportunity identification, NPD and product concept development, branding and labelling advice, sensory panels, pilot testing, equipment and product scaling-up. This resulted in 40 new seafood products from 18 companies. Currently, significant steps are being taken to develop consumer products from fish, such as boarfish and blue whiting, which are new to Irish tastes and European markets</p> <p>Two industry-led Expert Groups developed and published two Strategic Research Agendas (SRAs) – 'Food Research Ireland' (FRI) and 'Stimulating Sustainable Agricultural Production through Research & Innovation' (SSAPRI) in December 2011. These SRAs guide all funders operating in the agri-food space including DAFM, MI, Teagasc, EI, SFI, HRB, & EPA. They specifically guided the content of the last 3 Calls for Proposals under DAFM's FIRM & Stimulus competitive funding programmes. These resulted in awards to research institutions totalling €10m, €32m and €26 in 2011, 2012 and 2013 respectively. The 52 new projects awarded funding under the 2013 Call will provide direct employment opportunities for up to 89 contract researchers and a further 81 research opportunities for post-graduate students over the lifetime of these projects. In addition, this work ensured that agriculture and food featured in two of the 14 priority areas identified under the Government approved National Research Prioritisation Exercise.</p> | B |
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| 79 | Research and innovation resources in different institutes (state agencies, and universities) should work closely to maximise their synergies and increase overall effectiveness. This is currently exemplified through the recently announced Teagasc - UCC Strategic Alliance in Food Research | Teagasc | <p>Teagasc and UCC launched the Strategic Alliance in Food in May 2010. It was designed as a step towards creating a single food research programme in Ireland, supporting innovation and development in the food industry. Both organisations competed successfully under the banner of the Alliance in the most recent FIRM call.</p> <p>The Teagasc-UCC National Agricultural Research, Education and Innovation Partnership was launched in November 2011. This partnership aims to achieve greater efficiencies and effectiveness in the use of State resources. UCD has featured strongly under the FIRM awards, particularly in animal nutrition, animal health, food safety, food for health and forestry, where they will lead collaborative research projects.</p> <p>Both Partnerships have been very successful in attracting competitive research funding, and the three institutions involved (Teagasc, UCC and UCD) are partnering in preparations for a bid for EU Food Knowledge and Innovation Community (KIC). Teagasc and SFI cofunded projects in the ICT area in 2014. DAFM in conjunction with the IRC continue to fund the Employment based Masters programme and there is ongoing engagement between DAFM and SFI on research collaboration. On the marine side, IMERC is a collaboration between UCC, CIT and the Naval Service established to unlock Ireland's maritime and energy potential. See recommendation 128 for details of Teagasc's involvement with IDB and FHI while Teagasc is also involved with UCC and CIT on the The Alimentary Pharmaceutical Centre which has received funding for a third phase, with €36m being invested by the state and a further €14m by industry.</p> | B |
| 80 | Industry should examine the potential for building partnerships and working collaboratively in new markets | Industry | <p>The Bord Bia/Harvard Business School report "Pathways for Growth" strongly emphasised the need for Irish firms to work co-operatively, i.e. as partners not competitors, for mutual competitive advantage. Since the report's publication, Bord Bia has been actively working with industry on developing a culture of co-opetition to enhance market opportunities for Irish food and drink. To date, Bord Bia has progressed 28 projects involving 200 businesses in total where strategic cooperation could add value in the supply chain. These involve promotion, procurement, market access/trade, logistics and mentoring. Work programmes and support services are in place to deliver further collaboration in key areas of sourcing, market development and logistics. Examples of active collaboration in export markets among these co-opetition projects include resource sharing and partnering in Shanghai, joint marketing of beef in Spain, farmhouse cheese projects in the US and Germany and mushroom promotion in the UK market.</p> | B |
| 81 | Industry should work to reduce exchange rate exposure through market diversification and joint ventures with local companies. | Industry | <p>Food companies are working directly in the marketplace themselves to develop new customers etc. The primary processing sector is also working to diversify its continental markets and to prioritise on growth sectors. IDB has ambitious growth plans to grow business in emerging markets, and this forms a key part of the IDB's strategy up to 2020. IDB is setting a target of 30-35% of business to come from non-EU markets by 2020. With three quarters of exports going to the EU, FDI is actively working on the implementation of EU initiatives in this area through the Commission B2B Commercial Practices platform.</p> <p>Bord Bia has a number of market prioritisation projects in place with buyer meetings and targets. A new logistics mentoring service is being rolled out to assist Irish food and drink companies to maximise their distribution at best available rates. Following a very successful Marketplace 2012 where over €30m in new sales were written within 12 months, recruitment for Marketplace 2015 is underway with Marketplace training events currently being organised to improve links between Irish buyers and international markets/buyers. Marketplace Roadshow USA is planned for September.</p> | C |

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| 82 | Better utilisation of marketing expertise and mentoring programmes where appropriate should be advanced by Industry | Industry | <p>On marketing expertise see 58 above. 20 Large companies are now involved in mentoring SMEs under the skills share initiative. Some 34 companies across a variety of sectors have participated in training undertaken by Skillnet. By mid June 2014 281 participants had attended courses in areas including IT, management and financial skills. There is a strong interest in Lean programmes across the participants and a collaborative approach between the various participants.</p> <p>On marketing expertise see 58 above. 20 Large companies are now involved in mentoring SMEs as part of the skills share initiative.</p> <p>Food Academy Start is a new programme involving industry, Bord Bia Local Enterprise Offices (LEOs) to benefit companies (at start-up and pre start up stages) wishing to develop at local and regional level. Participants are mentored with one to one training covering finance, regulation and the wider marketing field. Graduates of the Food Academy Start programme will continue to work with their LEO, may progress to an in-store trial with SuperValu and can avail of the wider Bord Bia marketing services under Vantage. For the period to end June 2014, 200 companies/ start ups/pre start ups have completed Food Academy Start representing virtually all LEOs. It is estimated that 300 new jobs have been created as a result of this programme and that €5 million in retail sales will result from participant listings in Super Valu stores.</p> <p>Ten Origin Green Ambassadors have been assigned to a range of global food and drinks companies where they will become acquainted with best practice on business sustainability as well as promoting the Origin Green system.</p> | B |
| 83 | Substantial research to underpin and substantiate sustainability claims that will assist the brand Ireland concept | Bord Bia Teagasc | <p>See recommendations 40, 41, 55 above. A 2010 EU evaluation on the impact of livestock production on GHG emissions across MS indicated that Ireland is among three two lowest counties and the 4th lowest for beef production.</p> <p>Bord Bia is currently examining the potential to benchmark the sustainability performance of Irish beef production in relation to economic/social impact, water and biodiversity. Teagasc will be involved in scoping out the economic/social impacts. Work has continued to extend the scope of our beef scheme to include measures of biodiversity and water quality. This work ought be equally applicable to dairy products as much as it will be to beef and lamb. Work has also begun on an industry related sustainability programme as part of Origin Green. In 2012, DAFM awarded €784,554 in research funding to a Teagasc/UCD/ICBF project investigating increased environmental efficiency of ruminant production systems through the incorporation of a Life Cycle Assessment into a quality assurance scheme.</p> <p>As mentioned in 41 above, Teagasc is involved in a multi-country project, LEAP (Livestock Environmental Assessment and Performance Partnership), which is led by the FAO and is developing internationally agreed methodologies to assess the environmental performance of livestock production systems, including greenhouse gases and water. This project started in 2012. This is important to ensure the methodologies used by Teagasc/Bord Bia is in line with internationally agreed methodologies, and that these methodologies adequately deal with our unique grass-based systems.</p> <p>As mentioned in 54, Teagasc now has the capacity to measure carbon emissions on a farm basis for all of the farms in the Teagasc National Farm Survey (NFS). In turn this sample of farms can be weighted up to reflect the total farm population represented by the NFS. In 2013 Teagasc published farm level emission estimates using the 2012 NFS data. The next stage of the work will involve calculating the emissions for earlier years as well as providing emissions estimates for 2013.</p> <p>Teagasc is also introducing a capacity to measure the carbon footprint of agricultural products using the National Farm Survey. To date the carbon footprinting methodology has been applied in respect of milk, with the next stage being the development of carbon footprinting for beef.</p> | B |
| 84 | A collaborative industry drive is needed to achieve a greater share of branded products on export markets, ultimately using Brand Ireland as appropriate. | Industry | <p>Bord Bia's focus has been to develop, in conjunction with industry, a common proposition which resonates with international food market customers. Origin Green, launched in 2012 is now used as the umbrella for Ireland's participation at trade fairs organised by Bord Bia. Currently about 75% of food exports are provided by firms who are full members of Origin Green.</p> <p>The whiskey industry is now entering a new era with 15 new distilleries now being built or in planning. Growth of over 40% is projected by 2018. Many of these new entrants are planning to develop a branded strategy for their products.</p> | C |

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| 85 | Bord Bia should expand its successful marketing fellowship programme to build the sector's marketing capacity | Bord Bia | See recommendation 58 above. Bord Bia continues to roll out the successful Marketing Fellowship programme with the sixth cohort commencing the programme in June 2014. The scope of the programme has widened with Fellows placed for the first time in India and Australia in 2012, Japan in 2013 and Canada 2014. | B |
| 86 | Industry should initiate graduate internship programmes along the lines of Bord Bia's marketing fellowship programme. | Industry | See 58. Bord Bia in association with the industry is operating its Food Marketing Graduate Programme, its Food Industry Strategic Growth Programme as well as its Marketing Fellowship Programme. Bord Bia's 18-month Food Marketing Graduate Programme was developed in collaboration with IBEC and DIT. It commenced in July 2011 with 12 graduates placed with 12 food exporting companies in 8 overseas locations. It took in its second cohort in January 2013 and incorporated an internationally recognised postgraduate diploma in International Business Development. A third programme is currently being recruited. Many companies, including the Irish Dairy Board, run similar intern schemes. | B |
| 87 | Industry will need to focus on the opportunities to deliver the range of products required by leading retailers and manufacturers in the area of private label and to further leverage existing brands and relationships. | Industry | Marketplace events, organised by Bord Bia, provide a successful forum for introducing Irish companies to international buyers. Marketplace 2012 resulted in annual business of €31.8m and significant new buyer relationships fostered. Bord Bia has also initiated a new programme, the Continental Europe Private Label (CEPL) Programme 2013 to assist companies, through market analysis and introductions, become more aware of the commercial opportunities available from continental private labels. The CEPL programme has expanded in 2014 with additional companies, many of which participated on a Bord Bia organised stand at the Private Label Manufacturers Association trade fair in Amsterdam in May 2014. The Kerrygold brand is being leveraged to assist the launch of new butter-type products in the UK and Germany. Also, IDB has extensive in-market presence worldwide and is investing further in consumer insights to improve understanding of customer and retailer needs, circa 1/3 of €1.5m innovation budget will be allocated to this. The growth of Irish Whiskey will be furthered by its strong brand image | C |
| 88 | The further development of farmers' markets and food tourism will provide opportunities for diversification and added value for smaller enterprises in particular. This potential should be explored by relevant stakeholders. | Bord Bia | In 2011 Bord Bia undertook quantitative and qualitative research to evaluate and assess the value and viability of markets to the Irish artisan food and drink sector and to establish consumers views and demands. The findings were disseminated to market stallholders and managers in regional workshops in 2011. A short Bord Bia study in 2013 on behalf of DAFM identified the need for markets to be more broadly integrated into the community and recognised as an important contributor to the local economy to support their future viability. Ireland's food markets now include community, farmers markets, lunch-time and weekend city markets, co-operatives and country markets. The research confirmed that a traditional farmers markets definition is too narrow to describe this evolution. On foot of the detailed research Bord Bia produced a new updated Guide to Food Markets in Ireland characterising changing food market models, providing practical advice to stall holders and market managers and assessing future trends. The Guide was launched in April 2014 with delivery of a seminar and workshops for those involved in all markets. In the light of the developing food market sector, Bord Bia will work with the Department to take the markets sector (including markets which joined the 2009 voluntary Bord Bia/Department Code of Good Practice) towards a blueprint for recruiting the second generation of farmers' markets and their members and consumers. | B |

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| 89 | Bord Bia and industry should make the optimal use of Ireland's Protected Geographical Indications, and to identifying further designations. Ireland has not exploited this opportunity to any significant extent to date. | Bord Bia | <p>PGI status has already been received for four Irish products, Clare Island Salmon, Imokilly Regato, Connemara Hill Lamb and Timologue Brown Pudding. Following consultation with the TASTE Council, Bord Bia facilitated the application of the Waterford Blaa for PGI status. DAFM provided extensive ongoing support to the producer group to help this product successfully negotiated the national and EU registration process. Full PGI status was granted in November 2013.</p> <p>In 2012, a development strategy for the schemes was agreed and a cross agency committee comprising DAFM, Bord Bia, BIM and Teagasc was set up. The potential for achieving Geographical Indication status was highlighted at two workshops which were part of Regional Food Events in Athlone and Cork. In 2014 promotion of GI opportunities have taken place at Bord Bia events inc. the Bord Bia Small business open day and the Midlands Food Event. A new Council and Parliament Regulation (Reg EU No 1151/2012) covering the schemes was agreed. During 2013 and 2014 to date DAFM has engaged with several producers in drawing up applications for a variety of products which it is hoped will be ready for national consultation by 14Q4. The all-island application for Irish Salmon was withdrawn for reconsideration due to potential conflict with new origin labelling requirements.</p> | C |
| 90 | <ul style="list-style-type: none"> Encourage and support market-led food entrepreneurship from the earliest stages of development | Bord Bia | <p>In May 2013, Food Works 1 reached a conclusion after an intensive twelve month programme that took potential export focused food entrepreneurs on a journey from concept to feasibility to investor ready business plans. Delivered by Bord Bia, Enterprise Ireland and Teagasc, twenty nine participants completed their feasibility study on the Food Works programme by November 2012, with eleven selected to continue to the final phase of Food Works, the preparation of their business plan. A key element of this stage was the development of brand positionings for each participant through intensive consumer research and workshops. In addition, participants received feedback from a range of Tesco and Musgrave buyers and product developers to help them shape their final product offer as well as ongoing business and financial mentoring, technical support and the experiences and insights of established food entrepreneurs. This gave them the skills and tools to develop the finer details of their business plan.</p> <p>Since its creation, Food Works has seen in excess of 150 applications and a total of 43 start-ups from dairy, snacks, meat, seafood and beverages have participated in the programme.</p> <p>From Food Works 1 (2012/13), three companies are in receipt of EI HPSU supports. In addition, three participants presented to a private investor panel at the conclusion of Food Works 1. Two to three companies are in the pipeline for HPSU support from Food Works 2 (2013/4) and one participant made an investment pitch to the Food Halo Business Angels Network. Food Works 2 concluded on 26th June 2014 with the presentation of 5 investor ready business plans. It was the culmination of an eleven month programme that began with 48 applications of which 24 were selected for interview (inc. psychometric and intelligence testing) with 14 entrepreneurs chosen for Stage 4. Stage 4 (July-Dec) involved the completion of feasibility analyses, supports for participants included 10 group workshops on site at the Guinness Enterprise Centre, 10 individual business advisor sessions, consumer research, technical product development assistance and feasibility funding of €5,000 per participant. 11 feasibility studies were completed and presented. 5 participants progressed to stage 5 of Food Works whose main objective is to develop a financially sound investor ready business plan. During stage 5, participants attended eight Food Works workshops and completed eight advisory sessions with their appointed business advisor. All of the participating companies also availed of consumer focus groups in order to carry out their own primary research. Recruitment for Food Works 3 is currently underway with interested parties asked to register their interest online at www.foodworksireland.ie in advance of an official launch in the Autumn. The Food Works 3 programme is due to begin in January 2015.</p> <p>Food Academy Start is a new programme developed by Bord Bia with support from Musgraves and run by the Local Enterprise Offices. It is designed to benefit companies, at start-up and pre start up stages, looking to develop at local and regional level. Participants are mentored with one to one training covering finance, regulation and the wider marketing field. Graduates of the Food Academy can avail of a comprehensive suite of Bord Bia services. For the period to June 2014, over 200 companies/ start ups/pre start ups have completed Food Academy Start. It is estimated that 300 new jobs have been created as a result of this programme and that €5 million in retail sales will result from participant listings in Super Valu stores. Food Academy Advance is starting in Q3 2014.</p> | B |

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| 91 | • Promote sustainable and locally embedded food procurement policies and systems. | D/ECLG | Member States must produce National Action Plans (NAP) to reach a 50% target under the EU 'green' public procurement (GPP) Directive. D/ECLG has produced Ireland's NAP which has Food and Catering Services as one of six priorities in its plan and all Department/Agencies are aware of the Action Points set out in the NAP. D/ECLG has set up an implementation groups to oversee the progress. DAFM has drafted a guideline, currently the subject of consultation, setting out a possible approach to implementing the Action Points specific to Food and Catering including providing examples of how adherence to sustainable principles might be demonstrated by tenderers. Once agreed within DAFM, the draft will be circulated to higher spending food and catering Departments/Agencies, e.g. HSE, for observations. Food industry stakeholders will also be consulted. Given the complexity and risks associated with procurement legislation the draft will require approval by legal experts. A good example of what can be achieved is in the Marine Institute which introduced organic ingredients into their workplace canteen and redesigned its menu while maintaining the unit cost of the meal and reducing food waste. This included identifying food ingredients that could be sourced locally and local food producers who had 'approved supplier' controls. | C |
| 92 | • Promote and broaden the opportunities, including local markets, for consumers and visiting tourists to purchase local food. | Bord Bia | See 88 above on Farmers' Markets. Bord Bia facilitated over 61 artisan food businesses to sell their product and meet consumers in a market environment at the 5 day Bloom event welcoming over 106,000 visitors. In addition Bord Bia in partnership with the Local Enterprise Offices (LEO) and Supervalu has created the Food Academy Start programme to benefit companies (at start-up and pre start up stages) wishing to develop sales at local and regional level. Participants are mentored with one to one training covering finance, regulation and the wider marketing field. Graduates of the Food Academy can avail of a comprehensive suite of Bord Bia services. For the period to end June 2014, over 200 companies/ start ups/pre start ups have completed Food Academy Start representing virtually all LEOs. Over €5m in local sales is expected to result from the programme.and the Regional Food Fairs raised awareness of local food providers, particularly on a B2B level. Also Failte Ireland has adopted the promotion of local and seasonal produce as a selling point to the hospitality sector in Ireland. Failte Ireland has also been encouraged to include traditional regional dishes in their Place on a Plate initiative in their implementation framework. DAFM has also submitted a proposal to D/Transport, Tourism and Sport in the area of food tourism around linking a range of local high quality food and farm tourism related activities with a tourist trail. A response is awaited. | C |
| 93 | • Conserve and promote distinctive local food traditions at EU level and with bodies such as the TASTE Council and Slow Food | Bord Bia | The Taste Council continued to prioritise submissions on policy directly affecting the artisan sector and actively promoted the need for clear labelling and education initiatives. One outcome has been the development of a set of guidelines for artisan food labelling. These activities are reported on the TASTE Council website - www.tastecouncilofireland.com . The Bord Bia 'Traditional Food Skills for Tomorrow' booklet continues to be issued to interested parties and is now a PDF available on the TASTE Council website. A Bord Bia Traditional Foods Map of Ireland is also available on the TASTE Council website. The Taste Council Summer School was run in 2011 and 2012 and the TASTE Council/ Bord Bia Transition Year Module for Food was launched in early May 2013 at the annual Taste Council summer school. that module has been piloted in 8 schools and is currently being prepared for National Council for Curriculum and Assessment after which,if accepted, it will roll out nationally. | C |
| 94 | • Explore possibilities for mentoring by larger companies to support artisan companies achieve market distribution and build their customer base. | Industry Bord Bia | Bord Bia in conjunction with FDI has created Skillshare. This was launched in January 2012 and consists of a panel of industry practioners where large industry players mentor small businesses in the areas of business strategy, key account management & distribution. To date 20 large companies are mentoring 10 small companies. Building on the launch of Skillshare in 2012 and the success of collaborative industry mentoring on the Food Works programme, Bord Bia is working with the Local Enterprise Offices to incorporate formalised access to 'buddy' mentors in a local area as part of food marketing workshops, including not only other food producers but also retail owners and foodservice operators | B |

| 4.1: Beef | | | | |
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| 95 | DAFF and livestock industry should continue to support ICBF in its programme of genetic improvement and product quality. The Suckler Cow Welfare Scheme is also playing an important role in this regard. | DAFM | <p>see also 17 above. DAFM continues to give substantial support to ICBF through the NDP programme and direct grant aid.</p> <p>In addition programmes such as the Suckler Cow Welfare Scheme, Beef Data Program (first established in 2013) and the new Suckler Beef Genomics program (first established in 2014) are helping establish Ireland as world leaders in the application of latest genomic technology to our national suckler cow herd. The Suckler Cow Welfare scheme has helped to deliver 677k sire recorded weight records in the past 12 months, whereas before the introduction of the scheme the comparable level would have been 10% of this figure. The response to these schemes from farmers has been significant with 30,275 herds involved in the Beef Data program (BDP) in 2013, resulting in over 1 million useable records for genetic evaluations across the range of traits evaluated (e.g., calving, docility, calf quality, cow milk, and stock bull functionality). An even larger number of herds are now participating in the Suckler Beef Genomics scheme, with 34,644 herds involved in the scheme and over 117,000 cows and stock bulls identified for genotyping. The required research to establish routine genomic evaluations for beef cattle is now underway (being undertaken in conjunction with Teagasc), with a view to having operational genomic evaluations for farmers and industry by early next year. Its is anticipated that farmers will then use these evaluations to more accurately identify animals (both males and females) for their breeding herds, thereby increasing the level of genetic gain that we can achieve through our suckler beef industry</p> | B |

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| 96 | Collaboration between DAFF and AHI should continue to improve animal health and reduce losses due to animal disease. | DAFM- | <p>See also recommendation 12. AHI continues to work closely with DAFM across a range of control measures for non-regulated diseases particularly BVD and Johnes Disease and to improve the somatic cell count. DAFM is providing the National Reference Laboratory for BVD, to support the AHI-led BVD eradication programme. This has required significant resources and the forging of links with the Friedrich Loeffler Institute in Germany. DAFM Laboratories also participate as technical experts in a range of disciplines on each of AHI's seven Technical Working Groups Bovine Viral Diarrhoea</p> <p>Legislation in support of compulsory phase of Bovine Viral Diarrhoea (BVD) programme was brought into force in 2012, BVD was also made notifiable. The first year of the BVD compulsory programme has been completed. Compliance with requirements of the BVD Order (2012) has been high, with results recorded for 99.5% of the 2.1M registered calves born in 2013. 0.67% of these calves were considered to be persistently infected with BVD virus, with 11.25% of herds recording an initial positive or inconclusive result. These figures provide a national baseline against which progress is being measured. The overall prevalence of PI animals born in 2014 to date is 0.42%, running at less than half the 2013 outcome. The reduction in the number of 'empty' sample tubes returned is reflective of the experience gained by farmers in 2012 and 2013 in taking samples when tagging their calves. The retention of PI animals, particularly in beef herds has been identified as a priority issue. The importance of prompt disposal, in advance of breeding, continues to be emphasised in programme communications. A BVD helpdesk established with support of DAFM and Implementation Group meets regularly to monitor progress.</p> <p>DAFM also provides key inputs to the work of the JD Implementation Group through its Laboratories and the facility to allow farmers opt-in to Johnes disease screening by means of the Brucellosis round test samples. A voluntary pilot programme was launched in October 2013 with around 1900 herd owners applying for enrolment by the end of March 2014. In support of the programme, 15 training events have taken place with 318 veterinary practitioners now trained and approved to carry out veterinary on-farm risk assessment and management plans (V-RAMP) for enrolled herd owners. Ten laboratories have been approved to provide testing for herds within the programme.</p> <p>Continued delivery of CellCheck programme is being undertaken by AHI, Teagasc and partners to implement a CellCheck programme to achieve by 2020 a national average SCC rate of or below 200,000. In 2013, 95 workshops involving c.1,200 farmers took place and in Q1 2014, 13 Farmer Workshops completed with participation of approximately 180 farmers. Delivery of 2 more Stage 2 service provider training days increased the 300 + trained service providers to form workshop delivery teams. A complete national SCC dataset is expected to be available by end 2014. Continued awareness building systems are undertaken through regular technical articles in farming press, and publication of peer-reviewed scientific publications</p> | B |
| 97 | An industry group involving Teagasc, ICBF and commercial operators should be established to position the Irish dairy and beef sectors as global leaders in the genomics field and to develop communication channels to encourage uptake at farm level. | Teagasc ICBF | <p>ICBF has already established dairy and beef stakeholder groups, which meet at least 3 times per year to discuss and implement improvements to ICBF genetic evaluation and breeding program systems (including genomics). A number of initiatives specific to genomics have been established including;</p> <p>(A) the development of a customised SNP chip for use in dairy and beef cattle. This is the first ever national custom genotyping chip for Ireland which; (i) facilitates genomic selection, (ii) undertakes parentage testing where the parents are genotyped on the traditional microsatellite technology, (iii) screens for lethal recessive genes, and (iv) tests for congenital genetic defects and major genes. To date, almost 50,000 animals have been genotyped on the new chip, with a second version just launched to coincide with the new Suckler Beef Genomics (SBG) scheme. A third version of the chip is anticipated for later this year.</p> <p>(B) the initiation of the required research to underpin multi-breed genomic evaluations for beef and dairy cattle.</p> <p>(C) the establishment of a number of research projects to help promote uptake in genomics across the industry (e.g., genomics for dairy females and genomics for traceability, quality assurance and genetic improvement).</p> <p>In addition uptake in genomically selected dairy bulls continues within the National herd, with the number of GS inseminations by AI technicians having increased from 123k in 2010, to 148k in 2011 to 169k in 2012, 211k in 2013 and 263k in 2014 (61% of total dairy inseminations through the technician service). To date there has been a considerable uptake in this technology by Irish dairy</p> | B |

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| 98 | Stakeholders should make use of the beef quality payment system grid to facilitate a focus on carcase quality and maximise returns for beef producers | Industry | The beef quality payment system is a national standard focussed on quality determination and rewarding producers based on carcase suitability for market requirements. The QPS is in its third year of operation for steers and heifers but producers do not feel that it has maximised returns for them. | C |
| 99 | In the light of the fact that the great majority of beef farm enterprises are currently loss making, DAFF, Teagasc and the farm organisations should consider the best route to viability for the largest possible number of beef farmers. In this regard, consideration should be given to measures which, together with appropriate industry measures, could help to support beef cow numbers and encourage winter fattening. | DAFM Teagasc | DAFM established a Beef 2020 Activation Group (BAG) to identify, inter alia, the specific actions needed to improve competitiveness in beef farming. The report of the industry-led Group, which was presented to the HLIC in June 2011, suggested that the 20% increase in the output value of the beef sector targeted in FH2020 could be doubled on the basis of favourable market developments and specific additional measures being implemented by stakeholders. This more ambitious 40% target has already been reached. Among the BAG report's recommendations was the provision of public funding for a discussion group programme to underpin effective management and technology transfer in beef production similar to that already operating in the dairy sector. The Beef Technology Adoption Programme was subsequently launched by Minister Coveney in February 2012. Now in its third year, this successful Programme currently consists of some 7,000 participants (subject to further validations) organised into almost 450 discussion groups. Other measures designed to improve returns for primary producers have been introduced, including the ongoing Beef Data Programme (in 2013) and the Beef Genomics Scheme in 2014. The Beef Genomics Scheme is a particularly important innovation that utilises cutting-edge science developed by the Teagasc research facility at Moorepark in collaboration with the Irish Cattle Breeding Federation (ICBF). The use of genomics in dairy animals has helped transform cattle breeding in that sector as well as delivering tangible gains for efficient farmers. Introducing this technology for the suckler sector will help to improve the genetic quality of the national beef herd and to increase productivity and profitability at farm level. Teagasc initiatives, such as the BETTER Farm Beef Programme and the Derrypatrick Research / Demonstration Farm in Grange, Co. Meath, are designed to develop a roadmap for profitable beef production. They aim to improve technical efficiency within the farmgate by focusing on the key factors of breeding, fertility, animal health, grassland management & performance monitoring to increase enterprise output. An expanded Teagasc/Farmers Journal BETTER Farm programme has commenced with increased industry processing support. It now operates nationwide having grown from 12 to 37 farms. Between 2008 and 2012, these farms have increased their stocking rate from 1.85 LU to 2.03 LU/ha, have a tighter calving intervals of 12-14 weeks and an improved live weight again of 24%. | B |
| 100 | DAFF, Teagasc and producers should endeavour to continually improve knowledge dissemination and adoption of best practice in beef production through initiatives such as the Better Farm Beef programme (in conjunction with the Farmer's Journal). | Teagasc | An expanded Teagasc/Farmers Journal BETTER Farm programme has commenced with increased industry support. The number of Business & Technology Drystock Advisers has increased from 37 to 104 with the reassignment of over 60 Environment & Technology Advisers. These are backed up by five Cattle Specialists. Teagasc currently run 288 beef groups in the BTAP programme with 4,868 participants. Phase 2 includes the operation of satellite groups around 8 of the BETTER farms remaining in the programme after phase 1. Phase 1 of the Teagasc Better Farm Beef Programme has resulted in a 118% increase in gross margin across the 16 farms between 2008 and 2011. In 2008 the gross margin was €386/ha rising to €843/ha in 2012, an increase of €457/ha or 118%. On a whole farm basis across the group these farms are better off by just over €27,000. Two thirds of the gain in gross margin on the farms came from production gains and not as a result of an increase in beef price. | B |
| 101 | Strong collaboration between State agencies is required to ensure that relevant research outputs are applied at farm level, especially through the greater use of the BETTER farms programme and discussion groups. | Teagasc | See recommendation 100 above. The BTAP Programme in 2012, 2013 and 2014 will further assist in dissemination and uptake of best practice at farm level. The programme will run for 3 years and promotes best practice activities which will encourage improved farm management practices in future and its uptake is improved by the financial incentive provided. Teagasc, DAFM and ICBF are responsible for promoting these activities which represent a WIN WIN for the sector. There are 37 Teagasc/IFJ BETTER beef farms and 288 beef discussion groups | B |

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| 102 | Primary producers must be encouraged to optimise efficiency by adopting new technology and best commercial practice. Attendance at relevant discussion group meetings, farm walks and demonstration events should be built into the conditions of new schemes as appropriate. | Primary Producer Teagasc | <p>Beef Farmer Discussion Groups – increased from 1,200 to over 5,000 participants in 2013 with the majority of these participating in BTAP operated by Teagasc. In addition 1000 participate in private groups facilitated by private consultants trained by Teagasc. There were 14 Teagasc beef events at regional and national level with 10,000 farmers attending. This included a very successful beef 2014 open day in Grange with 6.400 farmers attending.</p> <p>Based on a discussion group format, the Beef and Sheep Technology Adoption Programmes (BTAP/STAP), the Dairy Efficiency Programme (DEP) and its successor, the Development Programme for Dairying (DPD) were designed to provide participants with the knowledge and the skills necessary to improve on-farm technical efficiency in a number of key areas, through focusing on issues such as grassland management, financial management, breeding, health and welfare and environmental efficiency. As a follow-on to these highly successful programmes, the new Rural Development Programme will establish Knowledge Transfer Groups in the following sectors:- Dairy; Beef and Sheep, Pigs and Poultry, Equine, Tillage. It is expected that circa. 30,000 participants will take part.</p> | B |
| 103 | Given that steer and heifer production will continue to be the mainstay of domestic beef production, and with a view to improving the economics and environmental impacts of this sector, Teagasc should direct its efficiency focus towards encouraging a reduced slaughtering age and more efficient grass and feed based systems. | Teagasc | <p>In 2011, Teagasc expanded its research programme on calves from the dairy herd to cover other breeds (Angus and Hereford) and steer production in addition to bull beef. This has continued in 2012 and 2013 and open day are held regularly on this programme in Johnstown castle with a specific beef manual launched at the 2012 National Ploughing Championships which dealt with all aspects of efficient, grass-based steer and heifer production. Research and Advisory programmes have a strong emphasis on improving efficiency (e.g. through better genetics, nutrition, animal health) and grassland management and on optimising lifetime efficiency. These messages are communicated to farmers through the Advisory service, and in particular through the 274 Discussion Groups now operated by Teagasc in the Beef technology Adoption Programme (BTAP) and the BETTER farms programme. In addition, Teagasc has prepared 2020 roadmaps for each sector setting out clearly the steps needed to be taken to achieve the 2020 targets which in the beef sector include optimal slaughtering age and feed management.</p> <p>A new Suckler Beef Genomics scheme, announced as part of Budget 2014 proposals, will increase the accuracy and speed with which the breeding value of young animals can be determined and used and help increase profitability at farm level.</p> | B |
| 104 | Given the improved feed conversion efficiency offered by young bull beef production, market-led production systems for young bulls from both the beef and dairy herd should be encouraged through enhanced research with clear price incentives that result in animals being finished to meet market specifications. | Industry | <p>In collaboration with industry, Teagasc initiated research into bull beef production from the dairy herd in 2010, and enhanced this further in 2011, as well as initiating research on suckler bull production. The superior feed efficiency and performance of the bulls compared to steers is evident, but work is continuing to develop system with a high use of grazed grass (to keep down costs) while at the same time meeting market specifications in relation to age at slaughter. Research is also underway on the eating quality of meat from bulls of different ages. Overall, industry view is that young bull production will remain a niche outlet and that grass-fed prime Irish beef from steers and heifers is a unique selling point to the UK and continental EU markets. DAFM also funded a Stimulus project on the topic of bull beef as part of Call 2011.</p> | C |
| 105 | Greater research efforts and strong communication programmes from Bord Bia and Teagasc should be developed to outline the opportunities and requirements for profitable domestic production systems for calves from the dairy herd. | Teagasc Bord Bia | <p>Bord Bia produced an information leaflet in the first quarter of 2011, giving options for calves from the dairy herd, listing price differentials and premiums, where possible, covering:</p> <ul style="list-style-type: none"> o Live export values – dairy vs beef calves, by breed. o Angus and Hereford branded beef programmes. o Male dairy beef marketing options/values. <p>This was disseminated on an ongoing basis through Teagasc, publicised in the Farmers Journal and used in all relevant fora to reinforce the message. Bord Bia continues to communicate the preferred market specifications for livestock categories at regular producer meetings and through newsletters.</p> <p>Teagasc research is continuing and includes liaison with Bord Bia on the suitability of different products for markets. In 2012, Teagasc further increased its programme on calves from the dairy herd to cover other breeds (Angus and Hereford) and steer production as well as well as bull beef. At Johnstown there are 240 Beef cross (both Aberdeen Angus and Hereford) being evaluated on a range of feeding systems. Approx 360 male dairy cross animals are also being evaluated. This programme is linked to four demonstration farms.</p> | C |

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| 106 | Research must continue into strategies to reduce GHG emissions in the sector, with involvement in international research initiatives on the issue - this research should include efforts to identify new technology based mitigation strategies, efforts to improve all GHG related herd management parameters (breeding, fertility, nutrition, etc) and efforts to improve quantification of all emissions and mitigation efforts. | Teagasc | <p>Teagasc's Environment Research Programme has major sub-programmes on GHG and Climate Change. These issues are being progressed through its involvement in national and international partnerships such as the Global Research Alliance and the EU's Joint Programming initiative. A major FP7 project on climate change mitigation and adaptation, ANIMALCHANGE, commenced in Q1 2011. Extensive research is also underway on specific abatement strategies including improvement of genetic merit of cows, extension of the grazing season, increased use of clover, carbon offsetting through grassland and forestry sequestration. Ireland is participating in an FAO project on benchmarking environmental performance of livestock production systems, with both DAFM and Teagasc providing funding for the project.</p> <p>Bord Bia has a work programme in place with Teagasc to look at the potential for reducing GHG emissions in Irish beef production. This programme encompasses areas such as feeding regimes, utilisation of grass, slaughter age, manure management and other potential mitigation strategies. Feedback to producers has commenced with a view to improving on-farm efficiency, which will also help reduce emissions. This programme will be ongoing over the coming years in order to help the Irish beef industry demonstrate ongoing improvements over time.</p> <p>Teagasc and UCD hosted the major international conference, Greenhouse Gases and Animal Agriculture 2013 in June 2013 with over 450 delegates from 45 countries. This conference brings together leading scientists from across the world who are researching technologies to reduce greenhouse gas emissions from animal agriculture.</p> | B |
| 107 | In order to remain competitive, the Industry should ensure that processing capacity in the beef sector matches producer output. This should be a guiding objective both for any State intervention in the sector and for industry participants. | Industry | Initiatives in this area must come from the industry itself and must be consistent with EU competition policy. Some progress has been made in this respect but excess slaughter capacity remains and will continue to undermine processing efficiency. Within that context, EI will facilitate in-company consolidations via the Beef Fund and will continue to support aligned initiatives. Industry have concerns with the spend time-line on the Beef and Sheepmeat Capital Investment Programme. | D |
| 108 | In light of the likely need for significant consolidation in the beef processing sector, DAFF should engage with the Competition Authority to ensure that the necessary action can be taken within competition rules. | DAFM | The question of consolidation in the sector is, of course, a matter for the industry and will be determined by commercial imperatives and subject to competition rules. However, DAFM met with the Competition Authority on two occasions to outline the competitive pressures and export focus of the Irish meat and dairy processing sectors, and the clearly identified need for scale and efficiency if the sector is to compete with much larger companies on EU and international markets. | C |
| 109 | DAFF should review the meat inspection system, with a view to achieving the most cost-effective system consistent with ensuring consumer confidence and regulatory compliance | DAFM | <p>The cost of the MIS has been reduced from €41.9m in 2008 to approx €28.3m in 2013. Cost recovery in the same period has improved from 35% to 53%. It is intended that the service will be further streamlined over time to provide a more cost effective service consistent with regulatory requirements and consumer safety and confidence.</p> <p>An independent lean review of the MIS as it operates in processing plants was completed in Q4 of 2013. This report recommends how greater efficiencies may be leveraged while ensuring that the Department continues to effectively meet its regulatory obligations. The Department is actively considering the report with a view to clearly determining its ultimate objectives for this important service.</p> <p>An increasing emphasis on the application of risk assessment and audit based inspection methodologies has allowed for more effective deployment of resources, while effecting cost reductions for industry. This work must be seen in the context of Food Harvest 2020 and food safety, including traceability and transparency, being a source of competitive advantage for Irish meat.</p> | B |
| 110 | The processing sector, with the support of the relevant State agencies, needs to embrace consumer-led product and packaging innovation to increase value-added beef and sheepmeat exports. | Industry | Meat Processors are constantly innovating products, product specifications and processes in line with customer demands. Bord Bia is working to involve meat companies more in foresight food research and their customised services are available to processors to support product and packaging innovation, especially focusing on spotting new product developments, as they emerge around the world. The work of the inter-agency packaging global sectoral team may impact on this action as their work progresses. | C |

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| 111 | Initiatives to position Irish grass-fed beef as a premium product in high value EU markets should continue. Specific efforts should focus on reducing the current price gap between Irish beef and premium products in these markets. | Bord Bia | A multi annual consumer promotional campaign in Germany began in 2012. This was developed on the basis of the findings of extensive research, including sensory testing, brand development and attitudinal research, to underpin the development of a robust branding and marketing strategy in that country. Similarly research was conducted in the Netherlands in 2012 to develop a campaign launched in June 2013. The same approach has been adopted in Italy where a consumer study has recently been concluded. For much of 2012 Irish cattle prices have exceeded the EU average male cattle price and has been consistently above it from November 2012 to date with the current differential +7%. | C |
| 112 | Given the potential to position Irish grass-fed beef as a premium product in US markets, developments with regards to market access issues in this market will be continually monitored | DAFM | The issue of market access to the US market for beef is being actively pursued as part of the wider EU negotiations with the US. In November 2013, the US lifted its ban on the importation of beef from the European Union. US Secretary of State for Agriculture, Tom Vilsack visited Ireland in June 2014 and the Minister again discussed the issue of Irish beef access to the US with him. A US team visited Ireland early July 2014 for an inspection of our control systems at Department and plant level. We expect a preliminary report from the audit within two months, with all going well, market entry before the end of 2014 | B |
| 113 | Bord Bia's current strategy of differentiation and premiumisation to extend to 2020 | Bord Bia | Bord Bia's strategy of differentiation and premiumisation has continued to target new retail and foodservice accounts. The number of accounts regularly being supplied with Irish beef now exceeds 75, a three fold increase on levels a decade ago. The consumer promotional campaign in Germany supported export growth to that market and new retail listings. A new campaign in the Netherlands was launched in 2013 and has had a positive impact in terms of Irish beef accessing new retail business. The Chefs' Irish Beef Club has been newly established in Germany, Switzerland and most recently in Italy. Membership of the club now includes some 74 chefs in seven markets. | B |
| 114 | The positive environmental, human-health and animal-welfare attributes associated with grass-fed beef and sheepmeat should be credibly established with a view to building them into marketing opportunities for Ireland. In addition, environmental criteria should be built into Quality Assurance schemes. | Bord Bia Teagasc | The environmental performance of all 33,000 farms participating in Bord Bia's new Beef and Lamb Quality Assurance Scheme, are monitored and tracked on an ongoing basis. The development and roll out of the 'Carbon Navigator' between Bord Bia and Teagasc now sees the emphasis moving towards assisting producers improve their environmental performance. Tracking sustainability criteria in conjunction with a national Quality Assurance Scheme is understood to be a world first and assists the Irish beef sector to proactively address an area of growing importance to customers. Teagasc has completed a research programme on the health attributes of grass-fed beef and this, together with its research on the verification of the low carbon output of grass-based production systems, will provide a sound evidential basis for international promotion campaigns. | B |
| 115 | Producers, processors, retail and foodservice operators should examine the potential for forward contracts within the supply chain with a view to providing clearer market signals and price stability to all involved. | Industry | The introduction of the QPS in the beef sector represents a positive step forward in market signalling. Industry believe forward contracting along the supply chain is limited and given marketplace reality has limited potential. A certain level of contracts between individual producers and individual processors is in place for winter finished animals and supply to specific beef breed programmes. Greater use of contracts was one of the key recommendations of the Dowling Report to the recent beef roundtable in light of the certainty which they can bring to supplier. However this is ultimately a matter between the supplier and the processor and DAFM has no role. Also Bord Bia continues to prioritise promotional activity to customers who are consistently returning a premium price to Irish suppliers. | C |

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| 116 | In recognition of the emergence of valuable by-product markets, the industry, in conjunction with Bord Bia, the Department of Foreign Affairs and DAFF, should identify a list of target markets for which access for Irish beef, beef offals and breeding stock should be secured. DAFF's Market Access Group, involving industry and Bord Bia should also continue to identify and target market access opportunities for Irish beef including live exports. | Bord Bia | <p>See recommendation 61 above. Bord Bia continued to work with DAFM and DFAT to pursue access to a number of markets with particular emphasis on the Japanese, US, GCC and Chinese markets. Bord Bia attend regular Market Access Group meetings with DAFM and Industry. New markets secured for Irish industry include:</p> <p>2012 - Beef: UAE lifted age restriction, Iran lifted ban. Sheepmeat: Singapore cert agreed, South Africa cert agreed, Pork: Serbia cert agreed. Poultry: Morocco cert agreed, UAE cert agreed.</p> <p>2013 - Beef: Iran cert agreed. Sheepmeat: UAE cert agreed, Canada cert agreed. Pork: Australia cert agreed. Processed Meats: Azerjaban cert agreed.</p> <p>Japan: Japanese Food Safety Committee (FSC) formally accepted the <u>MHLW's</u> request to consider Ireland's application to lift the ban on beef imports and referred the matter to the Prion Expert Committee (PEC).</p> <p>United States of America: The Department hosted a systems inspection audit for pork from the USDA from 12 to 25 September 2012. On beef in November 2013, the US lifted its ban on the importation of beef from the European Union and a US team visited Ireland early July 2014 for an inspection of our control systems at Department and plant level. We expect a preliminary report from the audit within two months, with all going well, market entry before the end of 2014</p> <p>GCC: Inspection visit from a GCC delegation consisting of representatives from the GCC Secretariat, Bahrain, Saudi, Oman and Bahrain in February 2013. Indicated they would be recommending lifting the ban on Irish sheepmeat and beef in the GCC region and then if that advice is taken by the GCC it will be up to Irish side to negotiate certs with each country individually.</p> <p>China: During the trade mission to China last year, agreement was reached on the setting up of a Joint working group on market access for Irish beef to the Chinese market involving the Chinese Inspection and Quarantine Service (AQSIQ) and the Department of Agriculture, Food and the Marine (DAFM). Comprehensive written information on Ireland's beef industry and BSE controls has been submitted to the Chinese authorities and is currently being reviewed by them. This issue is also raised on an on-going basis at political level between the two sides. It was raised by the Ceann Comhairle when he visited China in May, by Minister Coveney during a recent visit by Chinese Vice Minister Gan and by Minister Hayes in early June during a visit by Chinese Vice Minister Zhang.</p> <p>Teagasc is also undertaking research to enhance the value of animal by-products and has commenced a major project with the meat industry. Specifically, this projects will combine expertise in meat science and biotechnology with superior food processing and drying expertise to come up with a suite of products and ingredients for both food and feed industries.</p> | B |
| 4.2: Dairy | | | | |
| 117 | The processing industry must move towards a small number of scaled operators who have the scale and culture to drive efficiency and value added in line with key international competitors who have already achieved consolidation. | Industry | Industry view is that industry rationalisation remains a decision for the boards of respective companies. The State role is one of assisting and encouraging rationalisation. EI remains in discussion with key players to secure a good outcome, particularly focussing on achieving a higher value added to commodity mix in output. | D |
| 118 | The processing sector must ensure that processing capacity meets the expected increased milk supply post quotas. | Industry | The main players in the dairy processing industry have developed and are implementing their investment plans to deal with the expected increase in milk post 2015. These include Glanbia Ingredients Ireland Limited (GIIL) commitment to a €150m capital investment in new major dairy processing centre on the Kilkenny/Waterford border while Dairygold Co-Operative Society Limited has announced a €33 million investment to expand and upgrade its milk processing facilities at Mitchelstown, and is proposing a €90m investment for a new dryer in Mallow. These announcements follow on from the decision of Kerry Foods to locate its Global Research and Innovation Centre in Naas involving an investment of up to €100m. The Danone Baby Nutrition has announced a €20m investment in its Wexford manufacturing facility. Investments are also planned by a number of smaller cooperatives. | B |

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| 119 | Given that indicative costings are believed to be in the region of €400m, the industry at all levels must engage on alternative options for financing the expansion in capacity to process anticipated volume growth, including investigating efficient solutions to the processing of milk during the period of peak seasonal milk supply | Industry | See 118 above. All processors are engaged with their banks and others to ensure that capital expenditure required can be funded. | B |
| 120 | The future of the sector requires a co-ordinated national approach. DAFF should facilitate this through establishment of an activation group to encourage stakeholder engagement | DAFM | <p>The HLIC established a Dairy Expansion Activation Group under the chairmanship of Dr. Sean Brady. Following consultation with 22 organisations/ individuals, the Group published a road map in January 2011 setting out 55 action points and the timetables necessary to achieve the 50% increase in milk production. The roadmap indicated that progress was required on 4 broad areas:</p> <ul style="list-style-type: none"> • Identification of markets (11 action points), • Milk processing efficiency (12 action points for processors), • On-farm production (22 action points at producer level), • General agricultural policy/strategy (10 action points). <p>In order to assess progress made on the implementation of the 55 Action Points set out in the Roadmap, Dr Brady recently reconvened two meetings of the Group. Following examination of all of the Action points, the Group concluded that 38 were completed; 12 were ongoing and 5 were not completed within the timeframe set. In addition, the Group has identified a number of additional Action Points to address issues that still present impediments to the achieving of the 50% target and these will be presented to the Department and to the HLIC shortly.</p> | B |

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| 121 | Producers, with the support of state agencies and AHI, should adopt a best-practice approach to animal health to facilitate improvements in the quality of milk being produced | AHI | <p>See 12, 63, 96 & 123.</p> <p>CellCheck</p> <p>Individuals from the full range of stakeholder organisations are represented on the Industry Consultation and Technical Working Groups of the CellCheck programme, the objective of which is to enable the dairy industry to maintain a national average bulk milk somatic cell count of 200,000 cells/mL or less by 2020.. End 2014 target is to achieve a comprehensive national SCC database. Continued delivery of CellCheck programme is being undertaken. In 2013, 95 workshops involving c. 1,200 farmers took place. By end Q2 2014, 3 further Stage 2 service provider training days added to the database of over 300 trained service providers which form the workshop delivery teams. A series of 8 regional events held for all Stage 2-trained service providers to strengthen networks, and gain feedback on the programme to date.</p> <p>The national SCC dataset for 2013 was completed and the initial analysis commenced to progress CellCheck Milking for Quality award for the Top 500 supplier nationwide. Continued awareness- building through regular technical publications</p> <p>Johne's disease</p> <p>The implementation of the national control programme will lead over time to a reduction in the level of infection with Mycobacterium avium subsp. paratuberculosis in Irish dairy herds, improving the quality of the milk produced.</p> <p>In late 2013, AHI launched a pilot programme for the control of Johne's disease supported by DAFM with some 1900 dairy farmers enrolled (i.e. about 10% of dairy herds) in order to test, evaluate and refine the various programme components, including data handling, diagnostic and on-farm advisory elements and cost benefit analysis that would be required to support a future, extended Johne's disease control programme in Ireland.</p> <p>DAFM is providing funding to support the veterinary on-farm risk assessment and disease management advisory visits. Participating milk processors will contribute €100 towards the costs of animal testing. In support of the programme, 18 training events for veterinary practitioners have taken place with 391 now trained and approved to carry out veterinary on-farm risk assessment and management plans (V-RAMP) for enrolled herdowners. In addition eleven laboratories are now approved to provide testing for herds within the programme.</p> <p>A review, commissioned by AHI, of six of the most significant international Johne's control programmes has been published and is available on the AHI website. It sets out the international context for control programmes and highlights important commonalities and challenges for countries and regions seeking to institute and develop Johne's Disease control programmes.</p> | B |
| 122 | DAFF and livestock industry should continue to support Teagasc and ICBF in their programme of genetic improvement, including the application of new and emerging genomic technologies that will contribute to a more profitable dairy farming sector. | All | <p>See also 17 and 97 above. DAFM and the livestock sector have committed to supporting Teagasc and ICBF in their genetic improvement programmes for dairy cattle breeding. Specific examples include; (i) the establishment of the Next Generation research herd (at Teagasc Moorepark), (ii) the introduction of the new IDB19k SNP for provision of genomics services (with almost 20k animals genotyped for the year to date), (iii) the expansion of the Irish training population for genomics research (now over 7k dairy sires, based on collaboration with international partners), and (iv) the initiation of research required to produce genomic evaluations in a fully integrated evaluation (involving pedigree, genomics and own performance). It is anticipated that this latter piece of work will be made available to the dairy industry in 2015. Irish dairy farmers have been among the top adopters and implementers of genomic technology. Currently 52 of the top 75 bulls on the ICBF active bull list are genomically selected with all of the top 10 bulls being young GS bulls. The end result is that over the 2009-2013 period, the value of the genetic gain in the dairy herd has increased by €363m of which €211m relates to genomics.</p> | B |

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| 123 | The Industry should support AHI in its mission to enhance value for livestock farmers and the agri-food industry through superior animal health | Industry AHI | <p>See also Recommendations 12, 63, 96 and 121.</p> <p>The industry continues to provide funding and a range of other in-kind supports to AHI. The commitment to ensure matching of funding between the state and private sector funders has been fully honoured.</p> <p>The dairy industry has engaged with CellCheck, the national mastitis/SCC control programme, at a number of levels: through participation in the Industry Consultation and Technical Working Groups; through the active encouragement of participation by service providers and milk suppliers in the programme; by facilitating the sharing of milk supply data with the ICBF database; and by actively engaging with AHI in the process of setting industry-wide SCC goals and targets.</p> <p>The broader industry has been to the forefront in supporting initiatives for the control of the biosecure diseases prioritised by AHI, particularly in the BVD and Johne's disease Implementation Groups.</p> <p>SCC- First stage of engagement with service providers completed with attendance by c. 500 farm advisors, IMQCS machine technicians, veterinary practitioners, co-op milk quality advisors etc. · Second stage service provider training completed. 12 training events held between November 2012 and March 2013-c.220 service providers from all disciplines trained, for team delivery of CC Farmer Workshops. Farmer Workshops commenced September '12, and on-going-(c. 15 held to date). Analysis of national (unadjusted) SCC data in train. CC Farm Summary report completed, in conjunction with ICBF and now included with all milk recording reports. Costcheck SCC calculator completed and available from AHI and Teagasc websites. 7 Regional Coordinators identified and active.</p> | B |
| 124 | In the run up to quotas being abolished in 2015, DAFF should implement a more flexible and fully national Milk Quota Trading Scheme for the remainder of the milk quota regime. | DAFM | A National Pool has been an element of the Milk Quota Trading Scheme since December 2010 whereby partially unsold quota could be redistributed nationally. However the level of demand for milk quota around the country, since the introduction of the facility, has been such that all of the quota offered at, or slightly above, the market clearing price was sold. No seller was therefore faced with the prospect of selling only part of their quota within their Co-op area, and so no national redistribution has been necessary. The final Milk Quota Trading Scheme was held in February 2014. A National Pool was included in the Scheme to address the recommendation but it was not required. | A |
| 125 | Teagasc should set a target of ensuring that 9,000 progressive milk suppliers are participating in vibrant discussion groups, implementing advanced production techniques and preparing management accounts for their enterprises as underpinned by The Dairy Efficiency Programme. | Teagasc | The number of participating herds has increased to over 7,200 in 2011. However, as not everybody who applies, completes the programme, the number of producers who qualified for DEP payments in 2009 was 5,400. This increased to 5,838 for 2010. From a Teagasc perspective, the number of dairy groups in the DEP in 2012 was 337. There are 350 dairy discussion groups with 5,350 farmer participants. 2,857 Profit Monitors were completed by end June 2013, 1,744 of these were dairy producers. | C |
| 126 | DAFF and Teagasc should encourage primary producers to optimise efficiency by adopting new technology and best commercial practice. Attendance at relevant discussion group meetings, farm walks and demonstration events should be built into the conditions of new schemes as appropriate | DAFM Teagasc | <p>See also 102 above. The adoption of new technology and best commercial practice were elements of the Dairy Efficiency Programme (DEP) and its successor, the Development Programme for Dairying (DPD). which is aimed at new entrant dairy farmers. Both of these Programmes also incorporate significant participation in facilitated discussion groups. To date almost 7,000 milk producers have or are currently participating in Dairy Discussion groups. To date almost 600 milk producers have participated in DPD. These Group are of the view that the concept should continue to be promoted under the new RDP and it is proposed that the new RDP Knowledge Exchange programmes will encourage those who have not engaged with the process to date to do so.</p> <p>Irish dairy farmers have been among the top adopters and implementers of genomic technology. Currently 52 of the top 75 bulls on the 2014 ICBF active bull list are genomically selected, up from 35 in 2013, and the end result is that over the 2009-2013 period, the value of the genetic gain in the dairy herd has increased by €363m of which €211m relates to genomics.</p> | B |

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| 127 | Training schemes and college education programmes at all levels must be critically examined to ensure appropriate practical/technical content, and a greater focus on business and project management skills. | Teagasc | <p>Teagasc courses are continually updated to reflect leading edge technology generated through research centres and the advice from its Education Forum which is widely representative of all relevant stakeholders. The balance between theoretical and practical modules is to some extent influenced by these agencies but the issue is constantly monitored. Project management and business planning tools including Profit Monitor, Cost Control Planner, Farm Plans and ICBF Herd Plus are integral elements of courses. In the new dairy degree programme students take practical modules at Teagasc Kildalton and dairy farm placement and in their third year they will take research-based modules at Teagasc Moorepark.</p> <p>Food Harvest 2020 recommended the development and introduction of a new training programme for future dairy farm managers. On foot of this recommendation Teagasc developed a Professional Diploma in Dairy Farm Management programme in consultation with stakeholders. Graduates of this programme will receive Level 7 Professional Diploma from UCD. This new programme commenced with nineteen participants in September 2012 and a similar number in September 2013. The core element of the programme revolves around professional work experience on top Irish dairy commercial herds. Part of the professional work experience can be completed overseas. Quality and Qualifications Ireland (QQI) have agreed terms of reference with Teagasc for the review of Level 5 and L 6 agricultural awards. This review will commence in 2014 and is to be completed in 2015. In carrying out the review, Teagasc will consult extensively with key stakeholders on curriculum content.</p> <p>Teagasc have appointed a programme co-ordinator to co-ordinate the Teagasc Professional Diploma in Dairy Farm Management.</p> | B |
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| 128 | The processing sector, supported by Enterprise Ireland, Teagasc and 3rd level institutes must develop an investment strategy that will facilitate more commercially focused R & D | Industry | <p>This is an industry investment directed recommendation and overall Rec. 37 shows that industry research investment has not increased to any great extent. Nevertheless strides have been made by industry to develop an investment strategy for the dairy sector</p> <p>EI continued to operate existing support programmes using competence centres, industry led research centres, innovation partnerships, innovation vouchers & by supporting in-company R&D. Following significant engagement with participating dairy companies, the broad work programme, structures and priorities for a new Dairy Technology Centre has been agreed. 4 strong expression of interest were evaluated by an international panel in late November 2013. The call for proposals has been finalised and the establishment of the centre scheduled for end 2014.</p> <p>Food for Health Ireland is the State/Industry/Research Institute commercially focused project to develop and commercialise functional food ingredients and products to improve people's health and wellness. Funded jointly by EI and the industry its research agenda is focused on infant nutrition, metabolic health, infection/ immunity and healthy ageing. Phase 1 concluded with a number of new compounds emerging from the research and Phase 2 (2013-18) which was approved by EI in March is now focussed on commercialising these compounds.</p> <p>The IDB and Teagasc launched a Dairy Innovation Centre based in Moorepark, Cork in July 2011. its purpose was to create a pipeline of consumer products and value added ingredients which can be marketed internationally by the IDB. The programme has a full time staff of 5 supported by Teagasc scientists and by the IDB's international marketing and commercial teams. Since its establishment, 300 different cheese variants have been produced and three new varieties are scheduled for market launch. In Q4 2013, IDB launched a new investment in Saudi Arabia involving the production of a new cheese and pioneering technology developed by the IDB/Teagasc partnership. The technology allows innovative milk protein ingredients to be recombined for fresh white cheese production. Fresh white cheese is hugely popular in the Middle East. The facility will also include an Innovation Hub for the continued research and development of 'white cheese' technologies. Following the success of the Saudi launch, a second cheese has been commercialised with an Irish company. This continental cheese is scheduled for the launch in Germany shortly, having won a major award at an international cheese competition. Two more cheeses are well progressed and are planned for launch in 2015. Two further partnerships, one with an IMF company and one with one of our major Co-ops, are agreed and will be launched in the third quarter.</p> <p>DAFM in conjunction with industry developed the SRA for the food sector and is championing the implementation of the Action Plans for "Sustainable Food Production & Processing" & "Food for Health", two of the priority areas under the National Research Prioritisation Exercise (NRPE).</p> | B |
| 129 | R&D should be targeted to new product and process development with a greater focus on product areas with added-value potential, such as nutraceuticals and functional foods. | All | <p>Teagasc has an active research programme in this area, which includes participation in initiatives funded by SFI, DAFM, EI, MRB and industry. These include the Alimentary Pharmabiotic centre which aims to lead the commercialisation of probiotics in dairy products including infant milk formula. The APC (UCC/Teagasc/CIT) has received funding for a third phase, with €36m being invested by the state and a further €14m by industry. In addition, the project ELDERMET aims to develop new food innovation which will lead to improved gut health in the elderly. Another example of a multidisciplinary food and health initiative is the FIRM/HRB funded project NUTRAMARA which will focus on the development of marine based ingredients as bioactives in functional foods. The EI funded Food for Health Ireland Competence centre which is now fully operational is core to meeting this object. It is now in its second phase. This state-industry-3rd level institute and public research organisation project aims to discover and commercialise functional ingredients in milk. (see 57 above).</p> <p>DAFM has addressed this issue in the Strategic Research Agenda (SRA) recently completed by the industry-led Food Research Advisory Group. EI has also approved funding for 2nd phase of Food for Health Ireland. This the State-Industry-3rd Level Institute-project to discover and commercialise functional ingredients in milk- see 57 above</p> | B |

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| 130 | The relevant State agencies should develop fresh marketing initiatives that promote strong brand recognition of Irish grass-based milk products, possibly in the context of a more focused application of the 'Ireland - the Food Island' concept to the dairy sector. | Bord Bia | <p>Grass based farming forms a key component of Bord Bia's Origin Green Sustainability programme. To date sustainability assessments have been developed for beef and dairy and Bord Bia has also completed a Water Footprint assessment of Irish livestock farming. The SDAS scheme was launched in December further to receiving official accreditation. These assessments provide the benchmark for demonstrating our credentials at farm level. Bord Bia has developed a targeted marketing campaign to communicate the benefits of the Irish systems to customers in Europe, Middle East and China. Full European communication campaigns are planned for Q4 2014. At food manufacturing level some 260 companies have registered to participate in the Origin Green programme. To date 50 of these companies have developed Sustainability Plans and 16 of them have been formally approved by the programme verifiers, SGS. These plans set out clear targets for each company in relation to raw material sourcing, manufacturing and social sustainability. In September 2013, a global Sustainability Conference was organised by Bord Bia to start presenting Origin to major global customers. It was attended by almost 800 delegates - of which more than 300 were overseas visitors from over 25 countries. In the lead up to the conference, 151 new buyers participated on 14 different group industry itineraries as well as a range of customised itineraries. over 100 one-to-one buyer meetings took place over the course of the week.</p> <p>Teagasc has highlighted the sustainability and health benefits of grass-based food production, including publicising a recent EU report (GGELS) that showed Ireland has the lowest carbon footprint for milk production in the EU.</p> | B |
| 131 | Research must continue into strategies to reduce GHG emissions in the sector, with involvement in international research initiatives on the issue. This research should include efforts to identify new technology-based mitigation strategies, efforts to improve all GHG-related herd management parameters (breeding, fertility, nutrition, etc) and efforts to improve quantification of all emissions and mitigation efforts. | All | See 106 above, many of these projects apply equally to dairy and beef animals. Under the Department's 2010 Research Call, funding of €1,698,135 was awarded to a 'Gaseous Emissions-Agriculture and Land Use Network'. This network will bring together all the principal GHG researchers on the island of Ireland to further research and develop strategies to research emissions from the sector. Under DAFM's 2011 Research Call, funding of €2,736,050 was awarded to projects targetted at Nitrous Oxide and Methane emissions and Irish Forest Carbon Accounting. See 46 above in relation to the project on methane emissions that was funded as part of the FACCE JPI International Mitigation Call. | B |
| 4.3: Sheep | | | | |
| 132 | DAFF should continue to support investment in sheep fencing and handling facilities to reduce labour costs through the RDP Programme. | DAFM | Grant-aid for sheep fencing and mobile handling equipment was reintroduced as part of the TAMS in December 2011 following publication of the Department's Estimates for 2012. In March 2013, a revised Sheep Fencing/Handling Scheme was introduced which increased the maximum grant from €4,000 to €10,000 per holding and which also added further eligible items to the Scheme such as mobile meal feeders, hay racks, adoption units and tag readers. As a result, there has been increased interest by farmers in participating in the Scheme with 587 applications. By end 2013, payments totalling €0.548 million had been made. | A |
| 133 | The sector must improve the uptake of new technology on farms through the greater use of discussion groups and Teagasc BETTER farms programme for sheep | Teagasc | <p>A DAFM sponsored 3-year Sheep Technology Discussion Group (STAP) commenced in January 2013. Like the BTAP for the beef sector, this is intended to provide participants with the knowledge and the skills necessary to improve on-farm technical efficiency in a number of key areas, through focusing on issues such as grassland management, financial management, breeding, health and welfare and environmental efficiency. Approximately 4,400 participants were involved in 2013 and 2014, with a maximum annual payment of €1,000 per accepted participant. The uptake of new technologies and practices on sheep farming is being improved through the 9 BETTER farms set up for sheep and the 288 Sheep Discussion Groups currently in operation in the STAP programme.</p> <p>Teagasc & DAFM have initiated a Flock Health Forum under the chairmanship of Prof Michael Diskin, Teagasc Athenry. This brings together UCD, Teagasc and DAFM Laboratories and aims to optimise flock health advice to farmers and so improve efficiency.</p> | B |

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| 134 | DAFF and the sector should strongly support "Sheep Ireland" which has been established to develop a new breed improvement programme. | DAFM | <p>Sheep Ireland, which is associated with the ICBF, continued to make improvements to the national sheep breeding infrastructure. DAFM funding of €410,000 was provided for a range of measures designed to improve profitability for Irish sheep farmers. Working with all stakeholders in the industry, it made significant progress during 2013 in continuing to develop sheep breeding such as:</p> <ul style="list-style-type: none"> • Successful partnership with DAFM in implementation of the Sheep Technology Adoption Programme which has led to widespread uptake of rams being used with Eurostars available • Operation of Maternal Lamb Producer (MALP) flocks and Central Progeny Test (CPT) flocks around the country as breeding and demonstration schemes. • LambPlus service to pedigree breeders continued to perform well and numbers expanded significantly in 2013. • Plans started to revamp the Eurostar indexes, with the aim of producing a 'Replacement Index | B |
| 135 | The processing and production sectors must collaborate to improve the focus on quality production through the adoption of more discerning carcass classification systems by means of mechanical grading, and transparent price reporting systems | Industry | In the coming months stakeholders will engage in a review of the key recommendations of the Malone report on the Sheep Sector, which was endorsed by the FH2020 Group. As part of this process, a key objective will be a renewed focus on carcass quality and consistency. | D |
| 136 | The relevant state agencies and Teagasc must improve the focus on meat quality through initiatives such as the Bord Bia Lamb Quality Assurance Scheme. | Bord Bia | <p>Sheep producer membership of Bord Bia's Beef and Lamb Quality Assurance Scheme (BLQAS) was launched in Jan 2011. Applications for the BLQAS have grown consistently in the last year with current membership standing at over 12,500 equivalent to 65% of national throughput. Initiatives to continue this growth, such as STAP, are ongoing.</p> <p>The Bord Bia Quality Assurance logo is growing in importance with 95% of all lamb facings in Irish retail carry the mark.</p> | B |
| 137 | The committee endorses the findings and the recommendations of the Malone report and calls for their full implementation by all relevant stakeholders. | Sheep Irl | Sheep Ireland has been set up with support of industry to further progress the recommendations in the Malone Report. Sheep Ireland and Teagasc have collaborated in establishing the BETTER farm programme which will strengthen sheep breeding, there are now 9 Better sheep farms. The establishment of a sheep research/demonstration farm at Athenry focuses on optimising grass production, technical efficiency and best management practices for lowland sheep producers. It is also taking an active role in sheep breeding programmes and in bioscience-related initiatives in sheep research. | B |
| 138 | In order to remain competitive, the Industry should ensure that processing capacity in the sheepmeat sector matches producer output. This should be a guiding objective both for any State intervention in the sector and for industry participants. | Industry | See 107 above, this is primarily a matter for industry. | D |
| 139 | The processing sector, with the support of the relevant State agencies, must increase product and packaging innovation to increase the added value of sheep exports. | Industry | <p>This recommendation is primarily a matter for industry.</p> <p>See 110 above, the foresight4food research includes sheepmeat production innovations and research into emerging meat products is incorporated into Bord Bia's lifestyle trends research. A key driver in the value of Irish sheep meat exports has been the shift towards higher value products. In 2002 Ireland exported €160 million of sheepmeat product, equivalent to 47,000 tonnes. Almost 80% of these exports were shipped in a carcass form, the balance of 10,000 tonnes was exported as a boneless, value added product. In 2013 sheep exports reached €220m a 38% increase in value on 2002 figures, 70% of these exports were in boneless/break out product</p> | B |

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| 140 | The sector should extend its product range, including the marketing of 'local' lamb to the domestic market, with support from the relevant State agencies. | Industry | This is primarily a matter for industry and the processing industry has made advances in new value-added lamb product offerings to the market, both at home and abroad. Bord Bia continues to meet with, advise and support through its customised services, the local marketing efforts by processors and producer groups. Teagasc will continue to work with farmer groups such as Kerry Lamb and Mayo Lamb to exploit the opportunities for adding value through the local sourcing and marketing of food. In addition Bord Bia continues to support the Connemara Hill Lamb PGI group and are actively working with another group of sheep farmers with a PGI application | C |
| 141 | DAFF and Bord Bia should continue to promote lamb in the home and export markets, and also facilitate the diversification of exports from a dependence on exports of lamb carcasses to more processed cuts | Bord Bia | Bord Bia has been working with processors in developing new business for boned-out lamb in Belgium, Germany and Sweden and in improving market access for priority markets. Consumer promotions in the more traditional markets of France and Ireland have continued. Total Irish sheep meat exports in 2013 reached €220million up 4% on the previous year. Market diversification continues to be a feature of export trade especially to higher value markets such as Belgium, Germany, Sweden and Switzerland. These markets have been consistent in delivering double digit value and volume growth. Emerging International markets are growing in importance with Hong Kong being the primary destination of Irish sheep meat exports with shipments doubling to almost 1,200 tonnes. Consumer promotions in the more traditional markets of France and Ireland have continued. | B |
| 142 | DAFF should support EU initiatives to secure EU promotional funding for generic lamb promotion to promote EU lamb consumption | DAFM | The Agneau Presto campaign, co-funded by Bord Bia, Eblex (UK) and Interbev (France), which was initiated in 2008 as a three year programme, has been extended for another three years. DAFM has been fully supportive of this initiative which works to improve falling lamb consumption in France by targeting younger consumers and demonstrating how lamb can be a quick, easy and exciting meat to cook, hence the name. Mill in conjunction with other EU stakeholders is pushing for amendments to the EU promotion regulations to permit the funding of generic lamb promotion campaign. | A |
| 143 | The relevant state agencies should develop marketing opportunities centred on the positive environmental attributes of sheep farming. | Bord Bia | The environmental performance of all 33,000 farms participating. Tracking sustainability criteria in conjunction with a national Quality Assurance Scheme is understood to be a world first and assists the sector to proactively address an area of growing importance to customers. Teagasc has completed a research programme on the health attributes of grass-fed production systems and this, together with its research on the verification of the low carbon output of grass-based production systems, will provide a sound evidential basis for international promotion campaigns. | B |
| 4.4. Horticulture | | | | |
| 144 | DAFF should encourage greater participation in the development of producer organisations to facilitate greater bargaining power in the marketplace and to encourage the adoption of new technologies and best practice at sub-sectoral level. | DAFM | The integrated implementation of all the horticulture related recommendations in FH2020 is being progressed through the Horticulture Action Group (HAG), established by the former Minister of State. The group consists of DAFM, Teagasc, Bord Bia and sector representatives and the State Agencies meet on a regular basis DAFM is working in conjunction with Teagasc and Bord Bia to encourage greater participation in Producer organisations and is very actively involved in encouraging the existing PO's to adopt new technologies and best practices. The largest PO is spending upwards of 50% of its operational fund on new technologies. Teagasc has 1 horticultural Advisor (>50% of time) involved in running and promoting POs | B |

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| 145 | The industry must continually adapt its production methods both to minimise environmental effects and to benefit from adopting green technologies | Industry | <p>Significant developments have occurred over the past decade. Growers are subject to increasing controls by State Agencies and increasing demands from the retailers .In addition increasing numbers of them have become members of the Bord Bia Quality Assurance Schemes. They are therefore very aware of the environmental impacts of their production. Growers have also invested in newer growing facilities, heating systems and technologies principally as a means of reducing costs and will continue to do so in the future. The amendments to the NDP horticulture grant scheme has assisted in this process.</p> <p>In 2012 Bord Bia launched its Origin Green initiative which measures and certifies participants against key sustainability criteria including carbon foot print. Initially rolled out in the livestock sector the development of a sustainability element to the Horticulture Quality Assurance Scheme will be progressed in 2014. Produce packers are now enrolling in the Origin Green Programme.</p> <p>Support for integrated pest management practices in horticulture is urgently required, since all growers are legally obliged to have been implementing IPM practices since January 2014</p> | B |
| 146 | Relevant state agencies should foster product and production innovation, the adoption of emerging technologies and plant breeding. | Bord Bia EI Teagasc | <p>Bord Bia has in place an insight and innovation team whose services are available to Horticulture companies. Bord Bia continues to promote the innovation programme within the Industry. Discussions have taken place to maximise the potential support and initiatives to facilitate the NPD Irish plants programme. The recent research call issued by DAFM included a number of headings relevant to Horticulture and the sector was encouraged to partner in applications. A joint three year programme between Bord Bia, Teagasc and the Cut Foliage Industry has initiated a number of market led trials of new foliage varieties which are ongoing and which are targeted at the home and export market following 2012 market research which identified market opportunities. EI also assists in the area of innovation. The new Teagasc horticultural facilities at the Ashtown Food Campus will be used to support innovation and best practice in horticulture as well as linking with the food centre to add value to horticultural produce. Teagasc carries out research to support the horticulture sector and is collaborating with the Horticulture Development Company in the UK to help increase the amount of research and technical information available to the sector in Ireland.</p> | B |
| 147 | Processors should invest in specialised plant and equipment to improve labour productivity, working conditions and the quality of output. | Industry | <p>Processors are continually investing in their facilities in order to meet the growing legislative demands that are placed on them in relation to HACCP and health and safety. Processors are constantly looking at new technologies as a means of remaining competitive and generating new products.</p> <p>Whilst it is recommended that grant aid be made available for value added/processing activity in the horticulture sector through the NDP grant Scheme and/or the FEOGA Marketing & Processing Scheme, this latter scheme is still closed.</p> <p>Enterprise Ireland offers a range of supports which seeks to foster the development of expertise within companies geared towards leadership development, research, productivity and general efficiencies.</p> | C |
| 148 | DAFF should review funding under the Horticultural NDP with a view to maximising the uptake of green technology, including water recycling, energy from waste and innovation based on plant production | DAFM | <p>DAFM has amended the terms and conditions of the Horticultural NDP to facilitate the maximum uptake of green technology. Under the 2012 round grant aid of €3.21M was paid to 132 applicants whilst under the 2013 round, funding of €4.4 million was allocated to 175 applicants for investment in horticultural enterprises. A number of major projects involving combined heat and power systems along with other green technologies were funded.</p> | B |

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| 149 | The relevant Departments should review existing programmes and supports in relation to the horticulture sector, and should identify any changes in legislation or in the scope and type of measures required to develop the industry and associated businesses. | DAFM/EI | Horticulture enterprises can access a number of programmes and supports ranging from technical support, to training, to capital investment and to marketing/innovation assistance. In the context of Food Harvest 2020, Bord Bia has completed a guide booklet on the various grant schemes currently open to businesses in the horticulture sector. The booklet identifies the type of assistance available and the responsible body/agency. EI have examined how existing schemes can be adapted and/or modified to maximise assistance to horticultural companies. Enterprise Ireland has reviewed R&D supports for the horticulture industry and it has been agreed that existing measures will not be changed at this time. | D |
| 150 | DAFF and the relevant State agencies should further promote the health benefits of fruit and vegetable consumption as part of a healthy lifestyle. | Bord Bia- | There are a number of state agencies who have a role to play in this area. These include DAFM, Bord Bia, Safe Food, Department of Health and Department of Education. Bord Bia's annual promotions programmes for fresh produce titled "Best in Season" prominently feature the health benefits of consuming the recommended daily intake of fruit and vegetables. They include high profile promotional activity at Bloom and through the annual National Strawberry week. School programmes for 2014 such as "Food Dudes" and "Incredible Edibles" with high participation rates also play a significant role in contributing to a sustainable behaviour change in addressing the major challenges of childhood obesity. In 2014 the National roll out of the Food Dudes Programme to all national schools will have been completed and a follow up programme is being planned. The potato promotions group which was established in 2012 has agreed with packers (IPF) and growers (IFA) to proceed with a €1ml application in Sept 2014 to the EU to secure matching funding for a three year generic promotion of potatoes for the period 2015 to 2017. The application will be a joint application to the EU with the UK Potato Council. This application if successful will also be part funded by DAFM. During 2014 potatoes are being promoted through Bloom & National Potato Day. | B |
| 151 | Bord Bia should identify opportunities in relation to new products, e.g. herbs, indoor fruit production, mini potatoes, ornamentals and develop consumer awareness of domestic varieties. | Bord Bia | Bord Bia has carried out market research in this area. In addition CSO trade statistics have been analysed to identify where realistic import substitution opportunities exist and how these opportunities can be realised. Visits were undertaken to key crop/variety trials in the UK and Holland to look at possible new crop production opportunities & trends and the results assessed to see where potential exists to trial/grow new crops/varieties for the domestic market Teagasc continually monitor and assess the potential for introducing new crops, varieties and growing practices. While technically feasible to grow most crops in Ireland, the cost of production is the critical factor. Teagasc trials on the potential of berry fruit (Blueberries, Raspberries and Sweet Cherries) when grown with modern best practice technologies was established in Kildalton in 2013. Teagasc have conducted a number of research projects investigating the feasibility of new variety introductions in the field vegetable sector, which include onions, carrots, sweet potato, sprouting broccoli and potatoes etc. In relation to Mushrooms Teagasc are in discussions with the mushroom breeding sector to investigate the possibility of breeding new and better mushroom strains. Teagasc are leading a study to identify sources of low cost heat to the Protected Crops sector. The potential increase in the availability of heated glasshouses could facilitate an expansion in non-traditional fruit and vegetables as they usually require supplementary heat and protection to extend their production season. | B |
| 152 | Bord Bia-led market research should explore the opportunities for production of non- traditional fruit and vegetables. | Bord Bia | Research into opportunities for non-traditional fruit and vegetables is incorporated into the market research referred to in recommendation 151 above and Teagasc will input into the feasibility of growing potential new crops here. | B |

| 4.5 Organic Production | | | | |
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| 153 | DAFF should continue to directly support the sector through the Organic Farming Scheme and the Schemes of Grant Aid for the Development of the Organic Sector. | DAFM | The Scheme of Grant Aid for the Development of the Organic Sector is to ensure a regular supply of high quality organic produce to the market. It provides financial assistance in respect of investment/development projects on agricultural holdings, including equipment and facilities for production, preparation, distribution and/or sale of organic products. Grant aid of 40% of the cost up to a maximum of €60,000 in the case of on-farm investments and €0.5m. for investments off-farm is available. The current level of funding available in 2011 for such projects was €1.94 million, just over €624,000 was awarded in 2012 and €516,000 in 2013. | B |
| 154 | Bord Bia should continue to build consumer awareness of the availability of Irish organic produce through National Organic Week (NOW) campaigns and the National Organic Awards. | Bord Bia | NOW 2012 focused on increasing awareness of the benefits and frequency of consumption of organic food among 28-44 year old female shoppers. Activities included national press advertorials and advertising, PR and online activities and consumer leaflets for distribution in retail outlets. Organic food retail sales among the target group grew by 29% during National Organic Week. | B |
| 155 | Bord Bia should develop export markets and enhance the profile of the Irish Organic produce by attending major European food fairs such as Biofach. | Bord Bia | Bord Bia continues to integrate exporting organic companies into its existing programmes and business development events such as Trade Fairs, Marketplace etc. Bord Bia and eighteen companies participated at Biofach 2011, 16 in 2012. In 2013, 10 companies, including 10 seafood, participated at the Bord Bia organic stand at Biofach and in February 2014 eight participated. Other export related activity in 2014 includes a market study visit to Dusseldorf in Germany in September and the publication of a German organic market report with a dairy focus in August. | A |
| 156 | Teagasc should continue to carry out specific research, innovation and product development. | Teagasc | Teagasc continues to support the industry through its knowledge transfer programme including a national network of organic demonstration farms, two BTAP and one STAP organic beef and sheep discussion groups. It delivers a series of approved organic farming courses for new entrants to organic farming. These 25 hour courses are FETAC accredited to Level 5 standard and are run at locations throughout the country. In addition, it organises an annual national technical organic conference to keep farmers and stakeholders up to date with latest organic farming/product innovations and industry developments. | B |
| 4.6 Pigmeat | | | | |
| 157 | The industry must continually adapt its production methods to minimise environmental effects. | Industry | The industry is continually adapting its production methods to minimise environmental effects. The main emphasis over the past few years has been to plan for the phasing out of the transitional provisions in the Nitrates Regulations (SI No. 610 of 2010) and the use of manure in compliance with the Phosphorous limits operable from the 1st January 2017. These regulations have since been replaced by SI 31 of 2014. | C |

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| 158 | DAFF should convene a forum of relevant stakeholders including tillage farmers, pig producers and pig processors to investigate economies and efficiencies that could be achieved through enhanced cooperation in these sectors. | DAFM | <p>The recommended forum has not been convened. However, a number of reports and changes to regulations and schemes have been instrumental in securing improvements.</p> <p>The 2008 Teagasc report entitled “A Development strategy for the Irish pig industry 2008 – 2015” and the 2010 Interim Report of the Pig Industry Strategy Steering Group contained recommendations relevant to various production, processing and marketing aspects. Recommendations in relation to environmental and welfare aspects are being addressed in the current Nitrates Action Plan and in the Targeted Agricultural Modernisation Schemes.</p> <p>The interpretation of the transitional provision relating to pig slurry in the Nitrates regulations was amended in 2012 to further promote use of chemical fertilisers and pig slurry in tandem on all farms.</p> <p>The Department of Agriculture, EPA and the industry reached agreement that all records of movement of livestock manure should be reported to and recorded by the Department of Agriculture. This agreement means that EPA licensed holdings now submit records to DAFM on an annual basis and was identified in negotiations during the review of the Nitrates Action Programme as bringing over 90% of livestock manure records under DAFM control.</p> <p>Amendments to the Nitrates Regulations as a result of the review means that pig slurry will be targeted at lower phosphorus index soils which means more can be spread on land which is deficient in phosphorus and makes pig slurry a more attractive fertiliser for tillage farmers.</p> | C |
| 159 | Teagasc should enhance its programme of benchmarking pig herd performance to both monitor progress and support a revitalised programme of knowledge transfer. Producers, with the assistance of Teagasc, must focus on increasing sow productivity through the adoption of new technologies and best practice. | Teagasc Producer | <p>Teagasc have implemented improvements to its PigSys Herd Performance Monitor and have upgraded the programme on the Teagasc ePM system. Continued improvements are evident in farms using the PigSys programme. In 2012 the number of pigs produced per sow per year increased to 24.5 from 24.1 in 2011 and 23.9 in 2010. This has mainly been driven by the continued increase in the number of pigs born alive (increased from 12.01 in 2010, 12.33 in 2011 to 12.56 in 2012. Teagasc Pig Development Specialists continue to advocate full participation in PigSys by clients.</p> <p>Teagasc have secured a Pig Joint Programme with IFA. This Joint Programme, a collaboration between the IFA and Teagasc came into operation on May 1st 2013. This involves the collection of a levy in respect of each pig slaughtered or exported. The SI legally underpinning the programme (No. 98 of 2013), was signed by the Minister on 26 March, 2013, having been approved by the EU and by the Oireachtas.</p> <p>The funding will enable Teagasc to provide five new staff. With the Joint Programme in mind Teagasc are currently reviewing it's pig research and advisory programme to better target priority areas. A Pig Joint Programme Operational Group , comprised of Teagasc Pig Dept staff & pig producer members of the IFA) has been set up. They will report to the Teagasc Pig Commodity Advisory (Stakeholder) Group. Given the critical importance of feed (70% of production costs) the programme is being developed around the concept of “Two from Seven”, i.e individual herds produce 2 tonnes of pig meat produced per sow per year from 7 tonnes of feed. This will focus on producing 25 pigs per sow per year sold at 80 kg dead weight using no more than 280kg feed per pig produced including sow feed.</p> <p>Key Teagasc inputs in the achievement of this target include:</p> <ul style="list-style-type: none"> • Sow & Pig nutrition & management research, including a major project on improving feed conversion efficiency • Workshops and staff training | B |
| 160 | DAFF should review the pigmeat inspection system, with a view to achieving the most cost-effective system consistent with ensuring consumer confidence and regulatory compliance. | DAFM | See 109 above. The review and modernisation plan for meat inspections generally includes pigmeat inspection. DAFM will also take on board in this connection emerging proposals at EU level concerning inspection requirements for different species including pigs. | B |
| 161 | Industry and producers should extend their participation in the Bord Bia Pigmeat Quality Assurance Scheme | Bord Bia | The new PQAS Producer Standard which includes outdoor production is in place ensuring that all pig producers can participate in the scheme in future. This should further increase the level of participation in the scheme from the current rate of around 95%. | B |

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| 162 | All stakeholders should continue to ensure that Ireland is free from Aujeszky's disease and pursue the overall achievement of 'white list' status on animal disease. | DAFM | <p>In October 2012 Aujeszky's free status was awarded to Ireland following a presentation of the results of the eradication programme to the EU Standing Committee on the Food Chain and Animal Health (SCFCAH). These results demonstrated that Aujeszky's Disease in Ireland had been eradicated.</p> <p>This status is of significant benefit to the entire Irish pig sector as it recognises the high health standard of the national herd, helps protect our access to export markets and allows Ireland to exploit new market opportunities. As an Aujeszky's Disease free region Irish herdowners can now export live pigs to other AD free regions without the high cost of compulsory isolation, herd surveillance and blood testing.</p> | A |
| 163 | DAFF should lead efforts towards obtaining market access to additional countries that represent potential new viable outlets for Irish pigmeat, through negotiating the veterinary conditions for trade with these countries | DAFM | See recommendations 61 and 116 above for details of market access measures achieved and currently underway. | B |
| 164 | The Committee welcomes the provision of grant aid for the sector to facilitate compliance with EU animal welfare regulations through the sow housing (animal welfare) scheme supported through the Rural Development Programme. | DAFM | A revised Sow Welfare Scheme was introduced in July 2012 which increased the investment ceiling from €300,000 per holding to €500,000 per applicant for the first sow house, with further amounts of €300,000 for each of the next three houses. The grant-rate remained unchanged at 40 per cent. The Scheme is now closed for applications and €4.1m was paid out in 2013 with an additional €426,000 under a more general animal welfare scheme. | A |
| 165 | The industry should urgently investigate alternative waste usage and disposal options from the pig sector, such as energy/heat production and anaerobic digesters. | Industry | <p>Teagasc has an active group of researchers and advisers working with producers to identify economically feasible technologies for utilising waste streams from piggeries. Teagasc Pig development department carried out a DAFM funded project culminating in an end of project dissemination day on 8th June 2011 on this area.</p> <p>At present the most economical method of using pig manure is as a crop fertiliser. Anaerobic digestion is not economically feasible here yet for pig waste due to its composition but Teagasc hopes to invest in an Anaerobic Digester, covering all waste in the near future to demonstrate the feasibility of this technology in a farming context., see 49 above.</p> | C |
| 4.7 Cereals | | | | |
| 166 | Growers should place a greater emphasis on diversification in the tillage crops grown with greater consideration given to include beans, peas, oilseeds, biomass crops etc to increase overall returns per hectare. | Producers Teagasc | Cropping diversification options are continuously highlighted by Teagasc at its National Tillage Conference, local tillage seminars, at bio-energy events and through its advisory programme. Diversification options are largely limited by market opportunities rather than technical issues, however, where there is the potential to develop new markets Teagasc has and will continue to help develop these markets and address any technical issues limiting market development. | C |
| 167 | A greater level of winter sowing should be examined by Teagasc and growers as these crops are higher yielding and would spread the use and cost of machinery | Teagasc | Teagasc continually supports the increase in acreage of winter cereals by providing research and crop husbandry advice. Expansion of the winter barley area has been actively encouraged and supported, in recent years the area has increased from 15,000 ha in 2006 to an estimated 42,000 ha in 2014. Increases in winter barley plantings should also support increased plantings of Winter Oilseed Rape. However, price reductions and poor 2013 rape crops have reduced interest in this crop. An increase in the research programme on oilseed rape and other break crops will underpin the necessary increase in crop rotation needed to improve cropping sustainability. While winter crops allow our high yield potential to be exploited, they are also more susceptible to fungal pathogens requiring improved disease control strategies. Teagasc has a major programme in place which underpins disease control in a challenging environment of continuously evolving disease pathogens. Advisory messages at events, in Teagasc publications, group meetings and one to one visits supports the use of winter cropping. | B |

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| 168 | The possible role of new risk management strategies such as a greater reliance on farm insurance systems to cover production and market risks should be examined by DAFF and relevant stakeholders, particularly in the context of the CAP post-2013 deliberations. | DAFM | See recommendation 1 above. Teagasc has the capability in its Rural Economy and Development Programme to conduct research in this area. | C |
| 169 | DAFF should convene a forum of relevant stakeholders including tillage farmers, pig producers and pig processors to investigate potential economies and efficiencies that could be achieved through enhanced cooperation in these sectors. | DAFM | See 158 above | C |
| 170 | Increased targeted use of slurry should be promoted as it remains an effective means of reducing overall fertilizer costs, but also has environmental benefits when undertaken with, for example, with pig or poultry producers. | Teagasc | Teagasc continues to highlight the benefits of efficient manure utilisation for grassland and crop production. The message on targeting cattle slurry application to grassland in spring has been increasingly adopted at farm level, with Farm survey data indicating that the percentage of slurry applied in spring has increased from 34% in 2003 up to 52% in 2009. Teagasc also regularly publishes articles on the benefits of organic manures (particularly pig, poultry and mushroom compost) on tillage crops. The role of managing organic manures in an overall soil fertility and nutrient management strategy on farms is continually included in Teagasc KT activities. Teagasc advisory staff have received training on soil fertility management where a 5 step strategy was launched for the improvement of soil fertility on Irish farms. There was major focus placed on the efficient use of organic manures at farm level to help improve soil fertility and control farm production costs. A large number of local KT advisory event were organised to promote good soil fertility management on farms and there is a change in practice to more timely applications and more efficient use of nutrients in organic manures both on grassland and tillage farms nationally. The Agricultural Catchments Programme, which is funded by the Department of Agriculture, Food and the Marine and run by Teagasc works with 300 farmers across six catchments to evaluate the environmental and economic effects of the NAP measures implemented under the Nitrates Directive, provides national focal points for technology transfer and education in terms of best practice's in slurry management | B |

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| 171 | Industry needs to urgently prepare for the impact of the new EU pesticide regulations to ensure the sustainability of crop production in Ireland. | Industry | <p>Industry has actively engaged with implementation of new EU pesticide regulations which are being introduced on a phased basis. A register of advisors and equipment inspectors had to be in place by November 2013, professional users have to apply Integrated Pest Management principles from January 2014, a register of professional users and distributors has to be in place by November 2014 and equipment must be inspected by November 2016.</p> <p>DAFM put in place an online registration facility for Pesticide Advisors, Distributors, Professional Users and Inspectors of Application Equipment during 2014.</p> <p>DAFM and Teagasc jointly developed a training course for Inspectors of Application Equipment and the first of these took place in April. Further courses are planned for July and later on in 2014. An online system of recording these inspections is currently being designed by DAFM. This will enable Inspectors to maintain all details and records online. A new UCD Level 7 Diploma course, Integrated Pest Management and the Sustainable Use of Pesticides, commenced in February 2014 and will run until the end of the year. This was developed jointly by DAFM, Teagasc and UCD to train new Pesticide Advisors.</p> <p>DAFM and Teagasc jointly developed a training course for Inspectors of Application Equipment and the first of these took place in April. Further courses are planned for July and later on in 2014. An online system of recording these inspections is currently being designed by DAFM. This will enable Inspectors to maintain all details and records online.</p> <p>Teagasc is also involved in an EU Working group on IPM that is developing crop protection approaches in the context of the Sustainable Use of Pesticides Directive. The topic of IPM was included in the 2014 DAFM Call for Research Proposals</p> | B |
| 172 | Teagasc should continue to undertake research into low input, more efficient and more environmentally friendly production systems and ensure that relevant research is applied at farm level. | Teagasc | While growth achieved by Irish cereal growers are amongst the highest average yields in the world, continued sustainable intensification of crop productions will be necessary given the current and burgeoning future challenges to our food supply and to the environment. The main focus of current Teagasc cereals research programmes is to develop cost effective crop production systems, including crops for energy and bio-processing, which improve competitiveness, profitability and product quality, and minimise impact on the environment. A comprehensive knowledge transfer programme is operated by the Advisory service so that the results can be applied at farm level. | B |
| 173 | DAFF in conjunction with relevant agencies should examine the feasibility of Ireland becoming a source of basic or semi-basic seed for Europe. | DAFM | Ireland has not traditionally been an exporter of basic seed to other European countries. However, it is important that a high level of self-sufficiency in seed production is achieved nationally. In the current revision of EU seeds legislation, DAFM will negotiate to retain the present stringent legislative requirements for seed purity and quality. This will facilitate continued high production and usage of basic seed in the Irish tillage sector. | D |
| 174 | Teagasc should continue to provide an impartial research programme on the issues of GM crop cultivation to policy makers, tillage farmers, and the general public, in order that Ireland can engage in scientific discussions on new crop technologies and be to the forefront of technology should EU policy on GM crop cultivation alter and broader acceptance of the merits of GM technology emerge. | Teagasc | Teagasc will continue this research programme, which is currently focussed on assessing the agronomic, economic and environmental impact of GM-derived disease resistant and herbicide tolerant traits in Irish main crops. In addition, Teagasc have developed a novel technology platform which can generate GM crops while bypassing the suite of industry owned patents that currently exist for GM seeds ownership. To further assist policy-makers and the tillage sector as a whole, Irish specific coexistence regimes have been designed for GM potato and GM oilseed rape and the durability of novel sources of resistance to potato blight disease is also being investigated. As part of the EU-funded AMIGA project, Teagasc applied to the EPA for a license to undertake a series of field studies using GM potatoes resistant to potato blight disease to determine the potential impacts this technology could have on our ecosystems. This license was granted, subject to certain conditions, and field trials on these GM potatoes were carried out in 2012, 2013 and are underway in 2014. | B |
| 175 | Research should be undertaken into high value areas such as biopharmaceuticals, bioplastics and bioremediation. | Teagasc | <p>Teagasc has limited resources at present to undertake research in these areas. However there are a small number of projects dealing with specific issues in which Teagasc collaborates, for example; the INTEREG funded project 'Using SRC willow for the biofiltration / bioremediation of organic effluents and sludges', and the Stimulus-funded project 'High value products and ethanol from wheat straw and bran: enhancing our understanding and capacity for fungal bioconversion'. These research areas have the potential for expansion, funding permitting.</p> <p>Potential for biopharmaceuticals is being examined by the cross funder WG currently elaborating a Strategic Research & Innovation Agenda (SRIA) around the "Food for Health" priority area of the NRPE.</p> | C |

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| 176 | The focus of the Irish Grain Quality Assurance Scheme should further highlight its benefits in terms of its guarantee of quality and safety. | Industry | The Irish Grain Assurance Scheme (IGAS) assures customers that grain is produced, handled, stored and transported according to a defined Code of Practice. Almost 4,900 cereals producers are now participating in the scheme which accounts for approximately 90% of grain traded in Ireland | B |
| 177 | Price risk management, including forward selling, is a necessity in a globalised market and industry must further develop these instruments. | Industry | This is a matter primarily for industry Teagasc has the research capability in its Rural Economy and Development Programme to support this activity. | D |
| 178 | Farm organisations should promote farm to farm sales of grain as an efficient alternative route to market for both cereal growers and livestock feeders, adding value for growers while reducing costs for feeders. | Farm Orgs. | For the past few years, the Irish Farm Association has actively promoted farm-to-farm sales of grain. This efficient alternative route to market is advertised widely by the IFA National Grain Committee in the Farmers Journal, generally in July before the harvest period. Their information flyer for these sales provide detailed costing on rations and savings which can be achieved through substituting farm grain for silage. | B |
| 4.8: Poultry | | | | |
| 179 | The industry should implement zoonoses legislation rigorously in order to ensure ongoing consumer confidence. | Industry | Zoonoses legislation and control plans are already in place for the poultry sector and are subject to review every five years. These controls are rigorously implemented and strictly monitored. Any necessary enforcement measures for breaches detected are taken up to and including legal action. | A |
| 180 | DAFF and Teagasc should promote research into, and adoption of new technologies and practices aimed at improving efficiency, increasing return on investment and improving environment protection. | DAFM Teagasc | Teagasc has no poultry research resources per se, but its nutrient management research covers poultry manure. The poultry industry benefits from on-going Teagasc research on environment and nutrient management, energy efficiency, HACCP whole system approach and on-farm biosecurity. Also, Teagasc, in conjunction with DAFM, will examine possibilities for industry based, targeted research in these areas bearing in mind that the greatest threats to the industry are loss of consumer confidence and increased costs (feed, energy and waste disposal). A number of relevant knowledge deficits relating to this recommendation in general, including poultry, were identified in the SSAPRI and FRI reports. Some of these knowledge deficits were included in Call 2013 and successful projects were grant aided in autumn 2013 while Call 2014 which may lead to funding project(s) in this space. The interpretation of the transitional provision relating to poultry manure in the Nitrates regulations was amended in 2012 to further promote use of chemical fertilisers and poultry manure in tandem on all farms. DAFM reached agreement with the industry that where registered contractors were used to remove poultry litter DAFM would accept these as end users for the purpose of records provided by the poultry farmer. This has significantly eased the burden on poultry farmers to establish who exactly is the end user of the litter and is recognition of the role played by contractors as regards removal of poultry litter. Animal by products Division has recently published a Code of Good Practice for producers and end users and clarified legal obligations on hauliers. The review of the Nitrates Action Programme identified in 158 as making pig slurry more attractive to tillage farmers will have the same effect on poultry litter by encouraging it's use on phosphorus deficient land. | B |
| 181 | The Committee endorses the provision of grant-aid for adaptation to enriched cage and free range systems as part of the revised Rural Development Programme. | DAFM | The Poultry Welfare Scheme operated between 16 June 2010 and 12 August 2011 with the closing date for completion of work extended until end-September 2012. This Scheme is now closed and virtually all payments have been made to farmers under the Scheme. Expenditure under the Scheme, to date, has amounted to over €11 million. | A |

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| 182 | Encourage the industry, with the support of Enterprise Ireland, to invest in innovation and value-added output. | Industry | This a matter primarily for industry. The focus of EI is on those companies which are export orientated and which can sustain/grow jobs in Ireland. their growth is supported through innovation/R&D and competitiveness building measures. | D |
| 183 | Bord Bia to continue to promote the poultry and eggs Quality Assurance Schemes in order to prevent displacement by imported poultry meat. | Bord Bia | Quality Assurance Scheme poultry and egg promotions were incorporated into Bord Bia's promotional programme for 2011 with the support of industry funding. New chicken advertisements, have been developed in 2012 promoting the Quality Assurance Scheme for poultry. These campaigns are co-funded with industry. Penetration of quality assured chicken is monitored in Bord Bia quarterly retail audits and currently some 78 % of chicken carries the Quality Assurance mark in Irish retail outlets. An industry co-funded promotional campaign for Quality Assured eggs was executed during April 2014. | B |
| 184 | DAFF should negotiate veterinary conditions for trade with third countries identified by exporters as potential new viable outlets for poultry. | DAFM | See recommendations 61,116 and 163 above. In 2013, DAFM agreed a poultry veterinary health certificate with Morocco and also completed a poultry questionnaire as part of the process of gaining access to China, which is being examined by the Chinese authorities. In 2013, DAFM wrote to the UAE authorities seeking access to the UAE market for cooked poultymeat from Ireland. DAFM is pursuing the request via the Embassy in UAE. In 2014, DAFM provided additional requested information to Japanese authorities aimed at closing off the questionnaire on poultry access. | B |
| 4.9: Seafood | | | | |
| 185 | The twin development and research strategies for seafood, "Steering a new course, a Strategy for a Restructured, Sustainable and Profitable Seafood Sector 2007-2013" and "Sea Change, a Marine Knowledge, Research and Innovation Strategy for Ireland 2007-2013" supported by DAFF, BIM, Marine Institute, Bord Bia, EI and industry should continue to guide immediate priorities, consistent with available resources. | All DAFM to lead- | State bodies are focussed on delivering the strategic priorities contained in these reports. Key programmes & initiatives include:- <ul style="list-style-type: none"> • Domestic and overseas trade promotions to generate trade, increase consumption and raise the profile of Irish seafood in home and key export markets • Targeted market and trade research in new and existing export markets • Coordinated programme of buyer events/inward visits to provide opportunities for business development. • Robust programme of trade exhibition, buyer events and inward visits to facilitate buyer contact and opportunity identification. • Market Study Visits to key export markets. • Profiling market intelligence to lead innovation: e.g. Crab (Sweden) and Mussel (France) sensory (taste) profile benchmark study. Crab packaging design study (Spain). New strategies have now been developed to cover the period from 2013 onwards, i.e. BIM's strategy 2013-2017 ' Capturing Ireland's Share of the Global Seafood Opportunity' which sets a target of achieving 4 companies with a turnover of €1billion in sales by 2017 and Harvesting Our Ocean Wealth which is ireland's integrated integrated marine plan to develop the diverse marine economy and tap into the global markets for food, energy, health and technology which this resurce offers. See Recommendation 188 and 189 beneath for further details. | B |

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| 186 | The share of catch being processed by Irish companies should be progressively increased, adding value in Ireland. While seeking to maximise landings from Irish vessels, sourcing additional supply for Irish processors from non-Irish vessels should be encouraged. | BIM | <p>Progress has already being made. In 2010, 35,000 tonnes of Norwegian blue whiting was processed in Killybegs (17% of their 205,000t TAC). Despite the sizeable quota cut in the blue whiting quota for Norway, in 2011, 20,000 tonnes (out of a quota of 22,000T) were attracted into Killybegs factories for processing from Norwegian vessels. In 2012, this rose to 80,000 tonnes. In 2013, the supply fell to approx. 35,000 tonnes due to the high fish meal prices being paid in Norway making it more attractive for the Norwegian vessels to return to their home ports for landings. However, landings from up to 4 Spanish vessels per week are being processed in the south-west and exported to Europe as a result of a €10 m deal between Castletownbere Fishermens' Co-op and Mercadona, a major Spanish retail outfit</p> <p>Although Irish seafood exports declined 3% to €520 million in 2013, this follows a growth of almost 65% over the 2009-2012 period. Significant moves have been made to increase supply through processing of new species.</p> <p>Blue Whiting: BIM has been working with companies from the pelagic sector in the Seafood Development Centre to develop potential value added products from blue whiting. BIM undertook successful technical engineering trials to align machines to cater for these products and established that the blue whiting species is suitable for processing. This involves heading, gutting and filleting of the product for sale in frozen form in deli cuts or fillet form, for the human consumption markets. Previously this product was not processed in Ireland and had been reduced for fishmeal only. 30,000 tonnes of blue whiting was processed for human consumption markets in Killybegs in 2014 and this is an important employment and processing development given the raw material supply potential of this species.</p> <p>Boarfish: The Irish quota for boarfish this year is 56,666 tonnes or 2/3 of the international TAC. BIM is working with the industry to fast track the human consumption possibilities for this species and the aim is to utilize 15,000 tonnes of the species in this manner by 2015. Technical work has been undertaken to evaluate prospect of producing minced products from boarfish. Trials to date indicate success and market options are to be investigated. This work is being undertaken in tandem with major seafood companies in the north west and south west who are also looking at opportunities in the Chinese market. A major investment plan for development of a new facility in Killybegs to produce marine proteins from boarfish was announced in Qtr 2 of 2014.</p> | B |
| 187 | The development of innovative, consumer oriented seafood products should be supported by BIM Seafood Development Centre and Teagasc Ashtown Food Research Centre. | BIM | <p>BIM operates a three hub value added- partnership programme through SDC in the south west, Teagasc Ashtown on the east coast, and the Letterkenny Institute of Technology in the North West. By end 2011, over 300 entities have been working with the SDC on developing a range of seafood products.</p> <p>In 2011, there were 19 new seafood products delivered with eight companies. During 2012, 88 seafood companies used the Seafood Development (SDC) services covering market opportunity identification, NPD and product concept development, branding and labelling advice, sensory panels, pilot testing, equipment and product scaling-up. Eight companies launched 22 new products. Case studies are available covering innovations/npd from a range of Irish seafood companies. These projects include: microwaveable seafood product formats, matching a producer of responsibly sourced seafood with a large seafood processing company to produce a new range of chilled seafood products and development of a new trout caviar. In 2014, two new product ranges were launched. these included herring marinades under the "Silver Darlings" brand and a range of whitefish and salmon under the "Mr Goods Fabulous Seafood".</p> | B |

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| 188 | The R&D programmes on marine biotechnology development and marine functional foods underway by the Marine Institute should be continued and intensified. | MI. | The Marine Institute, within the overall context of Sea Change, sought to maximise the development of opportunities associated with high value products derived from marine biotechnology and marine functional foods. Comprehensive external reviews were undertaken on both the Marine Functional Food Research Initiative and the marine biodiscovery project to ensure that their research focused on the most promising areas. MI researchers were successful in EU funding programmes and collaborated with other researchers in the wider life sciences/biotech enterprise sector as well with the development of European marine biotechnology policy initiatives. The Marine Institute has also been engaged with other Depts/Agencies on the exercise undertaken by Forfas on behalf of the Cabinet Committee on Science, Technology and Innovation to set future national research priorities. A joint MI/DAFM (FIRM) funded Call for research proposals closed in May 2013 with a range of marine biotechnology/marine functional foods research proposals in areas of Food Innovation, Food Processing Technologies and Food and Health. | B |
| 189 | While recognising the place of specialist processors serving niche markets, restructuring and enhanced co-operation within the production, sales, marketing and processing areas should be supported by specific programmes. | BIM | <p>Seafood Hub -The original concept of facilitating the development of a dedicated seafood hub on the European mainland has evolved into the establishment of joint venture arrangements in Europe and Asia.</p> <p>BIM's Collective Route to Market Scheme, was introduced to promote greater collaboration within the sector as well as the establishment of appropriate joint venture operations and partnerships by offering seafood companies grant-aid assistance and expert advice to work collectively. This helps to reduce duplication costs and achieve economies of scale while improving customer service and enabling them provide innovative new products and protect raw material supplies. In turn, this helps increase negotiation power, boosts profitability and increase competitiveness on export markets.</p> <p>Following a very well attended industry workshop in 2011, four collective/joint ventures were developed including joint ventures for Asia, China, France and the African markets. The include Breizon on the west coast of France and Ocean Jade for the Chinese market. Invited speakers from New Zealand, Canada, the Netherlands and from Ireland shared experiences and provided an enlightening overview of recent developments and future trends and perspectives on the global market which prompted a strong audience participation in the panel discussions.</p> <p>In 2012 the industry's targeting of trade links with new markets was assisted by a €15.5 million worth of new investment by the Irish seafood processing companies, supported by grants of €3.2 million under the EU co-funded Seafood Processing Business Investment Scheme. Many of these businesses will be centrally involved in scaling up through the collectivisation measures which will ensure that they can access and serve key markets effectively by creating synergies resulting in cost savings, improved returns and increased market distribution.</p> <p>During 2013 and 2014, the companies continued to work on market development in China by extending the product range and engaged with BIM and Bord Bia in the marketing effort.</p> <p>In 2014 under the Seafood Processing Business Development Scheme an investment programme of €10.6 million was approved supported by grant aid of €2.65 million from which 157 jobs will emerge in 2016. BIM's benchmarked 38 seafood companies are performing well and have generated an additional €140 million in sales over the last three years.</p> | B |

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| 190 | The skills levels in the sector should to be augmented by focused technical training and boosting of management competence through the introduction of training, mentoring programmes and Graduate Placement programmes. | All | <p>In line with BIM's commitment to provide 3,500 training places, in 2010, a total of 1,183 training places were availed of as well as attendance at workshops and seminars by 144 personnel. In 2011, a total of 1,234 training places took place on relevant courses as well as attendance at workshops and seminars. In 2012, BIM provided 1,129 training places for seafood industry personnel while the Coastal Training Units which visited 20 coastal locations. In addition, a number of lifejacket demonstrations, including the Volvo Ocean event, workshops and seminars on a variety of topics were held around the coast. A nationwide sea safety promotion campaign resulted in a total of 509 BIM Basic Safety Training cards being issued in 2012. In 2013 BIM provided 1,602 training places at the National fisheries Colleges.</p> <p>As part of BIM's effort to enhance professionalism and business skills in the seafood sector, a new Graduate Development Programme was introduced in 2010 with the recruitment of two graduates from the faculty of Food science and Technology UCC. Through the programme the graduates learn and enhance their business, technology and interpersonal skills over a nine month placement in the SDC. They then continue to work in the seafood industry for a six month period with the view to full time employment. There is a huge benefit from this programme as the graduates are integrating into the seafood sector and bringing a culture of innovation, new ideas and technological skills.</p> <p>During 2012, BIM's Seafood Development Centre, in Clonakilty and University College Cork joined forces to drive sustainable innovation in the seafood sector by developing Ireland's first Diploma in Seafood Innovation. The course's first student intake happened in the autumn of 2013 and these were placed in seafood companies.</p> <p>See 28 above. EI has invested in developing the management capability of the food industry including a specific MBA programme for the seafood sector completed in 2010.</p> | B |
| 191 | There should be a greater integration of the seafood sector into the Irish food sector and treatment of it as such. | BIM Bord Bia | <p>Seafood clients continue to participate in a wide range of Bord Bia corporate events and programmes. These include the Irish & UK retail and foodservice programmes, the Dutch retail mentoring programme, cross sectoral international market study visits, the Brand Forum as well as non seafood specific trade shows and consumer events such as Bloom 2014; the MDD and Sirha trade shows in France and the Speciality & Fine Food Show planned for London in September of this year.</p> <p>Seafood clients also benefit from a dedicated seafood programme as well as access to Bord Bia's broader services such as Market & Consumer Research & Insight; Brand Development programmes; greater profile to overseas retailer accounts and participation in promotion events to consumer & trade media. Seafood clients work alongside other food and drink sectors on their membership of Origin Green and are benefitting from the strong communications platform in place to promote this brand to international trade and media.</p> | A |
| 192 | The implementation of quality and traceability labelling including voluntary labelling and certification for Irish fish products should be accelerated by the sector with appropriate supports from BIM and Bord Bia to differentiate Irish products on domestic and export markets. | BIM Bord Bia | <p>Bord Bia actively promotes the BIM quality assurance schemes through its point of sale and promotional material for the sector including its Seafood Exporters' Directory; annual Seafood Catalogue, species leaflets and in its direct discussions with the trade. The seafood sector has been very supportive in general of Bord Bia's sustainability initiative - Origin Green - with many of the leading seafood processors now registered for membership. Bord Bia is working closely with BIM to agree how membership of the BIM quality assurance schemes can help fast track Origin Green membership for seafood producers. Bord Bia and BIM are also exploring how the BIM annual auditing process can also be used to include an audit of the Origin Green targets agreed by the seafood clients. This will be very effective in lowering costs and avoiding duplication.</p> <p>As part of its Programme for delivery of a fully certified Standard for seafood incorporating quality, environmental responsibility and traceability, BIM, in conjunction with SFPA and the seafood industry, are actively involved in the introduction of full product traceability for the wild fish catching sector. This project now delivers full traceability at key national fisheries co-operatives and will be extended to the wider seafood sector during 2014. The scheme, will ensure compliance with EU Regulations and will provide a level of traceability, while complementing BIM's ISO 65 EN45011 environmental standard.</p> | B |

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| 193 | At EU level, Ireland should press for amendments to the Common Organisation of the Markets (CMO) to make it mandatory to give full details of origin of product to the consumer to differentiate Irish seafood from imports. | DAFM | <p>See also 192. The CMO review is part of the overall Common Fisheries Policy (CFP) Review .In May, the Irish Presidency secured agreement for a new Common Fisheries Policy. Its main elements include</p> <ul style="list-style-type: none"> <input type="checkbox"/> Higher fish quotas that fully respect scientific advice for managing sustainable stock levels. <input type="checkbox"/> Maintaining the "Hague Preferences" which protect and give additional quotas to Ireland <input type="checkbox"/> Prohibiting fish discards which will also assist the achievement of higher quotas. <input type="checkbox"/> Developing a more responsive regionalised decision making process. <input type="checkbox"/> A commitment to develop and strengthen biologically sensitive areas to afford additional protections for sensitive fishing grounds such as the "Irish Box". <input type="checkbox"/> Retaining ownership of fish quotas as a public asset to protect family owned fishing vessels | C |
| 194 | The implementation of a specific Inshore Fisheries Management framework should proceed as speedily as possible, to allow sustainable management of high value inshore stocks, consistent with conservation requirements. | DAFM | <p>In the case of inshore fisheries, the overriding short-term priority is to bring all inshore fisheries in Natura 2000 sites into full compliance with the EU Birds & Habitats Directives. To date, assessments have been prepared taking in over 45 Natura 2000 sites in the Irish Sea as well as others in Kerry, Cork and Donegal. The Marine Institute is preparing assessment reports of all sea-fisheries interactions with Natura 2000 sites on the south & west coasts. The reports will require the development of mitigation responses and will be subject to consultation with all stakeholders.</p> <p>In May 2014 the Minister launched the establishment of a National Inshore Fisheries Forum, supported by a network of Regional Inshore Forums aimed at supporting an industry-led approach to inshore fisheries management. The purpose of the Forums is to develop and facilitate implementation of policies and initiatives relating to the sustainable management of inshore fisheries within six nautical miles. A funding package worth up to €1m was also announced providing fishermen with financial support for environmentally friendly fishing practices and improvements in on-board quality and handling standards to optimise product quality. Maintaining sustainable inshore stocks is an environmental as well as economic imperative. The Department and its agencies continue to support sustainable stock exploitation through the provision of expert advice as well as implementation of formal management plans. Revised conservation measures were announced in May 2014 for lobster and shrimp fisheries, two high value inshore stocks. Other stocks currently under review include crawfish, whelk and razor clams. This reflects the importance of these stocks to the seafood economy but also maintaining healthy stocks of commercially exploited fish shellfish is one of the qualitative descriptors for determining good environmental status under the Marine Strategy Framework Directive.</p> | B |
| 195 | DAFF, and the Sea Fisheries Protection Authority (SFPA), should work with the seafood sector to develop simplified, effective administration systems for the sector, consistent with EU regulations and conservation requirements. | DAFM | Electronic reporting of catches for all vessels is now in place in accordance with the EU Control regulations 1224/2009 and 404/2011. The SFPA and the Department continue to meet the Seafood Industry on a monthly basis so as to maximise the benefit of the fisheries quotas allocated to Ireland and to improve the effectiveness of administration | B |
| 196 | The relevant departments and state agencies should resolve current difficulties related to Aquaculture licensing, to facilitate timely issuing of new and renewed aquaculture licenses consistent with EU conservation directives. This will underpin existing investments and underpin additional investment. | DAFM | Collaboration between DAFM, Marine Institute, and the National Parks and Wildlife Service (NPWS) has led to significant progress. The carrying out of detailed surveys of marine habitats and species has been completed and Conservation Objectives have been set by the NPWS for a significant number of bays. In addition Appropriate Assessments have now been completed in Castlemaine Harbour, Lough Swilly, Donegal Bay, Roaringwater Bay, Dundalk Bay, Dungarvan Harbour and Clew Bay. Appropriate Assessments are ongoing in other Natura areas. Steady progress has also been made in relation to the issue of licence determinations. There were 6 licence determinations made in 2011, 115 licence determinations made in 2012, 137 in 2013 and over 200 anticipated for 2014. | C |

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| 197 | The Marine Institute in conjunction with Bord Iascaigh Mhara should work with industry to research and develop inshore and offshore aquaculture and alternative species on a commercial and profitable scale. | BIM MI | <p>Following its presentation to the Food Harvest High Level Implementation Committee in January 2011, BIM scoped out an offshore marine finfish development.</p> <p>During 2011, the work programme concentrated on site identification and selection, review of current international technological development, data gathering, logistics planning and interaction with international and domestic potential investors and operators and preparation of the licence application with their required comprehensive environmental impact assessment.</p> <p>BIM has applied for an aquaculture licence to develop an organic salmon farm on the leese of Inis Oírr in Galway Bay. The proposed farm, if licenced, will produce up to 15,000 tonnes of organic salmon every year, worth €102 million annually. This level of production will help create an estimated 350 jobs directly with a further 150 supported indirectly after four years of operation, generating a wage flow of about €14.5 million, directly into the local economy. A decision on the licence application will be made by the Minister.</p> <p>If an aquaculture licence is granted it is BIM's intention, subject to agreement with the DPER, to undergo a public tender process for the operation of the proposed farm but retaining the licence in the hands of the State, ensuring it remains a valuable State-asset. To date 21 investors from three continents have registered firm interest in the €60 million investment for the proposed deep sea organic salmon farm in Galway Bay. BIM has commenced technical work on further sites off the west coast and further licence applications are expected by the year end. Initial steps are currently being taken to assess the possibilities for deep sea salmon farming off the Mayo coast.</p> | C |
| 198 | Ireland, principally through the Marine Institute, should continue taking a leading role in improving the quality of marine science related to water quality and wild fish stocks. | MI | <p>The Marine Institute has increased its collaboration with industry through the Irish Fisheries Science Research Partnership. A detailed analysis of the significance of the Biological Sensitive Area was undertaken confirming the importance of juvenile fish in the Celtic Sea. Fisheries Science Services continue to promote and support the development of Long Term Management Plans for cod, haddock and whiting stock of key importance to Ireland as well as providing scientific support on NATURA 2000 obligations and marine fisheries.</p> <p>In November 2013, the Department of the Environment, Community and Local Government, published 'Ireland's Marine Strategy Framework Directive Initial Assessment Report'. The report drew on a large range of data and information sources, including national monitoring and assessment reports, national survey results and scientific literature together with State, consultancy and academic expert knowledge. The report highlights that :</p> <ul style="list-style-type: none"> • In general, seabed habitats are considered to be in a healthy condition; • The main human sources of nutrient enrichment into the Irish assessment area are agricultural activities, waste water discharges and run-off from unsewered properties. The overall nutrient status is considered good and consistent with the achievement of Good Environmental Status (GES); • Seafood from Irish waters consistently complies with maximum standards set in European Law for non-synthetic contaminants; • The level of radionuclides in shellfish samples is very low with the majority of measurements being close to or below limits of detection; <p>Atlas of the Distribution and Relative Abundance of Marine Mammals in Irish Offshore Waters</p> <p>Also, the "Atlas of the Distribution and Relative Abundance of Marine Mammals in Irish Offshore Waters: 2005-2011", was launched by Minister for Arts, Heritage and the Gaeltacht in July 2013. The Atlas marks the culmination of six years of surveys involving more than 1,000 days at sea. It contains a detailed analysis of 21 species of porpoises, dolphins, whales and seals in Irish waters showing seasonal and geographic location and provides a valuable data source for marine scientists, marine conservationists and all with an interest in marine mammals and their protection.</p> | B |

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| 199 | The Irish seafood sector, with DAFF, BIM and MI, should promote the development of long-term management plans for fish stocks having regard to the need for environmental and social sustainability. | DAFM MI BIM | <p>See recommendation 194 above re inshore stocks and recommendation 193 on outcome of CFP review.</p> <p>Long term management plans have been developed for stocks such as horse mackerel, Celtic Sea herring. Interim management plan on boar fish was accepted by the Commission in December 2012. This resulted in this fishery being regulated for the first time and was instrumental in Ireland securing a 67.5% share of the fishery into the future. Cod Recovery and Discard Reduction Projects were undertaken in 2012:</p> <p>Selectivity trials were carried out in the Celtic Sea to investigate a number of technical innovations to fishing gear (including square mesh panels and larger codend mesh size). Selectivity parameters were established for a number of species in the mixed whitefish fishery in the Celtic Sea. Trials were carried out using the Seltra sorting box in the Irish Sea Nephrops fishery. The results from these were promising with significantly less bycatch of haddock, whiting and cod. Further trials were undertaken in 2013 to further investigate the potential of both the Seltra and Flip Flap trawls as more selective gear in this fishery. Trials of the 2012 Technical Measures were conducted in the Celtic Sea towards a better understanding of their impact on seine netting.</p> <p>Introduction of Fisheries Local Action Groups or FLAGS. The programme, to be implemented by BIM, will be delivered as part of the National Development Plan and the European Fisheries Fund. FLAGS will be established in each region of the country to deliver a strategy for their own area on a devolved basis. The programme aims to maintain economic and social prosperity by adding value to fisheries and aquaculture sectors; retain and create employment through the support for diversification and through restructuring of areas facing socio-economic difficulties as a direct result of changes in the Fisheries sector. The programme will provide the tools and resources to local people to develop solutions to meet their future needs. BIM has fully engaged with the local coastal communities and in 2012 the appointment of the FLAGS brought that vital BIM/coastal community link onto a new level of partnership. During 2013 and 2014 the FLAGS were assisted in producing their development plans and during 2014 projects have been approved and are already operating on the ground.</p> | B |
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| 200 | The industry, supported by BIM and MI, should continue to develop environmentally sustainable fishing and aquaculture production methods to secure a sustainable resource base and to underpin the development of a smart, green and clean image which contributes to the overall strategy for the food industry. | BIM MI | <p>Following its development over a number of years the BIM Responsibly Sourced Standard was fully accredited as an internationally recognised, third-party accredited standard in September 2012. Providing certification for fishing vessels and onshore facilities, the core components of the standard describe the responsible practices, quality, and traceability of whitefish, prawns, pelagic species, and crustacean products from producer to consumer. BIM, working closely with industry, facilitated 80 vessels and an onshore facility achieve certification to the Responsibly Sourced Standard during the year. Over the course of 2012 there was a steady demand for information about the Standard especially from processors interested in achieving certification and purchasing product from certified vessels. Recognising this interest, BIM began a second phase of industry support and initiated a programme to bring certified vessels and onshore facilities together to assist in the generation of an available supply of certified fish to the retail sector. In 2012 five seafood companies successfully completed the first green programme with BIM and in association with Bord Bia's Origin Green initiative. This programme seeks to reduce energy and utility costs for seafood processors resulting in improved environmental management systems. In 2014 BIM continued to work with seafood companies to complete the Green Seafood Business programme enabling them to achieve cost reductions and membership of Origin Green. Substantial savings have been achieved by a number of the larger seafood companies, and these have plans to invest and upgrade some technologies. See also action 199 for further environmental measures.</p> <p>From an aquaculture perspective the now mature nature of the quality and eco-label/organic schemes means that developments in the membership of the schemes will be incremental. The schemes continue to develop best practice to ensure that the Irish aquaculture industry meets the demands of the customer. As part of this a pilot project for MSC certification of rope mussels is also in train for 2012. The 2012 position for the major aquaculture species is as follows:</p> <table><tr><td>Product</td><td>2011 status</td><td>2012</td></tr><tr><td>Farmed salmon</td><td>100%-organic/eco label</td><td>100%</td></tr><tr><td>Rope mussels</td><td>50%- quality/organic</td><td>60%</td></tr><tr><td>Bottom Grown mussels</td><td>50% -quality/organic</td><td>Work towards attaining MSC certification on an all-island basis</td></tr><tr><td>Oyster</td><td>50% quality/product differentiation</td><td>63%</td></tr></table> <p>The Marine Institute has been working towards Maximum Sustainable Yield (MSY) and the improvement in the sustainable exploitation of many stocks is evidence of the success of this.</p> | Product | 2011 status | 2012 | Farmed salmon | 100%-organic/eco label | 100% | Rope mussels | 50%- quality/organic | 60% | Bottom Grown mussels | 50% -quality/organic | Work towards attaining MSC certification on an all-island basis | Oyster | 50% quality/product differentiation | 63% | B |
| Product | 2011 status | 2012 | | | | | | | | | | | | | | | | | |
| Farmed salmon | 100%-organic/eco label | 100% | | | | | | | | | | | | | | | | | |
| Rope mussels | 50%- quality/organic | 60% | | | | | | | | | | | | | | | | | |
| Bottom Grown mussels | 50% -quality/organic | Work towards attaining MSC certification on an all-island basis | | | | | | | | | | | | | | | | | |
| Oyster | 50% quality/product differentiation | 63% | | | | | | | | | | | | | | | | | |
| 4.10 Forestry & Bio-Energy Crops | | | | | | | | | | | | | | | | | | | |
| 201 | DAFF and Industry should further explore measures to bring about a significant increase in the annual afforestation level per annum to 2020. DAFF will continue to examine more efficient methods of increasing the planting level in view of its urgency. The Committee recommends the adoption of the target planting rates for afforestation to be agreed in the parallel Forestry Review due to report by end-2010. | DAFM | <p>The Forest Policy Review was completed in 2012, and in line with Strategic Environmental Assessment procedures, was issued for public comment in June 2013. . The draft Forestry Programme 2014-2020 has now been drafted and is with D/PER for approval. It aims to increase afforestation rates from c.6,500ha/yr in 2013 to 10,000ha/yr by 2020 and will be successful depending on the level of funding provided, operational costs and level of interest among land owners</p> | B | | | | | | | | | | | | | | | |

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| 202 | Industry should promote producer groups in order to reduce management costs and increase the marketability of timber from private forests. | Industry | See 208 beneath. Teagasc, as part of its Forestry Development Programme, which is part funded by DAFM, is working with forest owners and industry in establishing and mentoring forest owner producer groups. By end 2014, 26 such groups have been established which are at varying stages of development. Teagasc is continuing to assist and advise existing and new producer groups while support for producer groups is included in the draft Forestry Programme 2014-2020 currently with the Dept. of Public Expenditure and Reform | B |
| 203 | DAFF should continue to support the provision of the forest road network, while also evaluating new infrastructure systems. | DAFM | Forest Support Schemes budget for 2012 was €5.45m and a total of €3.078 million of this was paid in harvesting road grants in 2012. This accounted for 81,111 metres of forest road network servicing an area of 4,793 hectares of forestry. A total of €2.709 million was paid by the Department in harvesting road grants in 2013, towards the construction of 83 kilometres of forest road infrastructure. The Department is currently circulating for consultation details of a revised scheme with a view to its introduction in early 2015. | B |
| 204 | Industry and representative organisations should support operator training and education. | Industry | Following a Training and Educational Needs Analysis undertaken by Forestry Training and Education (Ireland) Ltd, (FTEI) and the subsequent engagement of a consultant to progress its implementation, it was decided, in the context of reduced availability of funding, to target funding for forestry training on the development of a Forest Machine Operator (FMO) Programme and the provision of hard skills training for forestry students at Ballyhaise, WIT and UCD. The consultant advised that it appeared that the industry would support the development of a FMO programme through the provision of work experience placement, etc. but that there was no indication of financial support towards the running costs of FTEI or for the provision of specific skills courses (for forestry operatives), the co-ordination of which was fulfilled by FTEI over the last number of years, with 100% funding from the Forestry Division of the Department. Funding was accordingly provided, on a pilot basis, to the 3 training colleges for the 2012/13 academic year, with discussions to be held with those training providers in relation to progress on the FMO training proposal. The final report of the Forest Policy Review Group - "Forests, Products and People", outlines a number of strategic actions to ensure the availability of suitable programmes of education and training across the sector and research programmes targeted at identified needs. The Department is currently considering the recommendations contained in report. The draft Forestry Programme 2014-2020 includes a Knowledge transfer and Information Actions measure which makes provision for a number of sub-measures including targeting training for forest owners, professional foresters and forestry workers. | C |
| 205 | Teagasc and the relevant third-level institutions should ensure relevant and up-to-date training to meet new developments | Teagasc | See also recommendation 204. Teagasc consults with a wide range of farming and industry stakeholders in the review and planning of its programmes to ensure the relevance of its education programmes to the needs of the sector and meeting best practice standards. An Education Forum, representative of all stakeholders in agricultural education and training provides the strategic direction for all Teagasc training provision to young farmers and in technical, agriculture, horticulture and forestry. | B |
| 206 | DAFF should continue to support the growing bioenergy sector through the Bioenergy Scheme, co-funded by the EU under the Rural Development Programme | DAFM | Since 2010, DAFM has continued to support the growing bioenergy sector through the Bioenergy Scheme, co-funded by the EU under the Rural Development Programme. Despite the incentive offered by the scheme, the take-up has been somewhat disappointing in that it supported the establishment of 353 hectares of crops in 2010, 224 hectares of crops in 2011 and a further 214 hectares in 2012, with 79 in 2013. Bioenergy crops will continue to be supported under proposals in the draft RDP 2014-2020 not yet agreed by the EU Commission. | B |

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| 207 | Supply chain mechanisms should be developed to ensure biomass crops are brought to market and full market returns realised. | Industry State | DAFM actively and continually supports the first stage of the supply chain by providing grant-aid for forestry and energy crops. Forest roads programme assists with mobilisation of forest biomass resource. It assists with measures to support the development of a market for biomass crops through the development of the Wood Fuel Quality Assurance Scheme (WFQA) in collaboration with the Irish BioEnergy Association, SEAI and industry participants. The scheme is certified by the NSAI and covers firewood, pellets, woodchip and wood briquettes. The formation of an Irish pellet producers association was facilitated as part of WFQA whose membership is being expanded. Other measures by DCENR, DECLG and industry will build other stages of supply chain. The National Bioenergy Strategy to be published by DCENR will further consider measures to support supply chain development, while DECLG will examine opportunities for supports under LEADER. | C |
| 208 | The relevant state agencies, growers and the timber-processing sector should collaborate to improve and develop the timber supply chain to reduce costs and increase efficiencies. | Industry DAFM | Forest owner producer groups are developing timber supply chains. In 2010, a Model Timber Sales System, developed by the Irish Timber Growers Association (ITGA), funded by DAFM, was launched; a supply chain software was developed for industry use; and an all-Ireland roundwood production forecast and demand report was produced. The ITGA is now involved in the development of a Template Timber Sales Agreement (with funding from DAFM). The Wood Fuel Quality Assurance Scheme continued to promote the benefits of quality wood fuels and is seeking to expand its membership. The projected increase in demand for timber for processing and for wood energy will have to be met by the private sector as the Coillte supply is relatively static up to 2020. Teagasc is currently facilitating 26 private forest owner groups on a number of different levels ranging from delivering training and advice; to discussion groups; to using GIS techniques to cluster forest owners into more viable harvesting units. The ultimate aim of all of these groups is to improve their level of knowledge of forest management operations and to work together to optimise the returns from their forests. The longer established groups such as the Donegal Woodland Owners Group and the Clare Wood Energy Project have already established successful timber supply chains. Teagasc ran four Regional Timber Marketing Days during March 2012 in counties Cavan, Laois, Galway and Cork attracting over 500 forest owners. The purpose of these Regional Timber Marketing Days was twofold: to give forest owners the opportunity to make contact with foresters, harvesting contractors and timber buyers and to provide forest owners with the know how to successfully carry out thinning. Teagasc hosted 2 similar Timber Marketing Events in September 2013. The final report of the Forest Policy Review Group proposes a number of actions to develop an efficient, sustainable and environmentally responsible supply chain. The proposals include the development of a National Roundwood Mobilisation Strategy; the carrying out of a national survey of current harvesting and transport infrastructure capacity; the development of a standardised system for timber measurement and removals; and the evaluation and testing of small scale harvesting equipment for private forests. | B |
| 209 | DAFF should lead an intensive marketing campaign on the benefits of farm forestry, including supplying the bioenergy market to attract new entrants. | DAFM | DAFM and Teagasc jointly operated pilot marketing and promotional campaigns in Cork (2009), Roscommon (2010) and Clare (2011). Following a review of these pilot campaigns and the amount of time and effort involved, DAFM and Teagasc agreed a different approach for promotional and advisory activities in 2012. This included a nationwide series of one-to-one advisory clinics by Teagasc advisors. The attendance at these clinics, which provided individual advice and guidance to farmers, was very positive. Similar One-to-One clinics were held in Spring 2013, with the focus on afforestation. These were well attended with good indication of interest for new planting. | B |
| 210 | DAFF and the relevant state agencies should continue to research the ability of forestry to sequester carbon and the extent to which it can help to reduce Ireland's greenhouse gas emissions from agriculture and the non emissions trading sector in general. | All | See also 43 above. The final report on the COFORD CARBWARE project includes an updated reporting tool which will enable better reporting to the UNFCCC on changes in forest carbon stocks. In parallel, research on wood fuel supply chains continued to be funded by DAFM in the context of wood as an alternative to fossil fuels and in reducing greenhouse gas emissions. This recommendation is also being achieved through the Department's involvement and collaboration with the EU Joint Programming Initiative on "Agriculture, Food Security & Climate Change", the NZ-led Global Research Alliance on Agricultural Greenhouse Gases and relevant ERANets. | C |

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| 211 | DAFF and the relevant state agencies should consider the development of a national certification standard for sustainable forestry management. | DAFM | <p>In 2012, FSC International ratified the FSC Irish Forest Stewardship Standard agreed by environmental, social and economic stakeholders in Ireland. The Programme for the Endorsement of Forest Certification (PEFC) Irish forest certification standard obtained PEFC International endorsement in December 2011.</p> <p>Ireland has already integrated the FOREST EUROPE definition of SFM into its National Forest Standard. At the FOREST EUROPE Ministerial Conference held in Oslo in June 2011, Ministers responsible for forests decided to take further international action consisting of the elaboration of a legally binding agreement (LBA) on forests in Europe and established an Intergovernmental Negotiating Committee (INC) with the mandate to develop such an agreement. The Resumed Fourth Session of the Intergovernmental Negotiating Committee for a LBA on Forests in Europe in November 2013 concluded without agreement. Institutional issues remained the main obstacle hindering an overall consensus on the final draft agreement. However, the parties remain committed to bringing the draft text to an extraordinary ministerial meeting for further guidance. The Ministers of the FOREST EUROPE parties will now discuss how to proceed and conclude on the LBA, which aims to provide a framework for coherent forest policy development and implementation in the pan-European region.</p> <p>Teagasc encourages private forest owners to investigate the benefits of certification. Certification has economic benefits as well as strong environmental and social credentials. Teagasc Forestry has organised an internal workshop to bring Forestry Development Officers up to speed in relation to both schemes. FSC and PEFC representatives participated in this workshop. Certification is also discussed at timber measurement courses run by Teagasc Forestry for private forest owners.</p> | B |
| 212 | The industry should plant more broadleaf varieties to improve benefit from biodiversity and leisure benefits. | Industry | The national target of 30% of total annual planting is currently being exceeded. Teagasc runs a number of dedicated tree planting events annually, aimed at farmers considering planting and it also conducts research to improve the quality and productivity of broadleaf species such as sycamore and ash to underpin greater economic and environmental returns. Teagasc promotes the improvement of biodiversity on farms and in farm forests by running dedicated biodiversity farm walk and has produced the first high resolution land cover and habitat map of Ireland. | A |
| 213 | The timber processing sector industry should invest in R&D and innovation to assist product development and forestry management. | Industry | <p>This is a matter primarily for industry.</p> <p>EI advances this recommendation through its proactive engagement with Industry through its specialist timber product unit.</p> | D |
| 214 | Teagasc should continue to research the potential of crops to provide energy and develop efficient production, harvesting and storage methods. | Teagasc | <p>Detailed research has been conducted on new and existing varieties of Miscanthus and SRC willow, the two most popular energy crops. Additional research areas on energy crops include nutrient use and bioremediation, harvest efficiency as well as storage of both Miscanthus and willow in chip form. Two new research projects on energy crop agronomy commenced in 2012. One project on SRC willow will focus primarily on growth and yield development across a range of soil types with the second focusing on Miscanthus on minimising establishment cost, effective weed control as well as on optimising nutrient use.</p> <p>The area of bioenergy crops is currently contracting, due primarily to poor financial performance, rather than lack of technical information - there are up-to-date best practice guidelines for both coppice and miscanthus. Therefore, due to limited staff resources Teagasc has decided to reduce the research programme in this area over time. Existing important projects on establishment and genetic improvement of energy grasses will be completed but the programme will be reduced unless a change to the market and support mechanisms requiring additional technical information justifies continued investment in this area.</p> | C |

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| 215 | DAFF, via the COFORD research programme, should continue to support sustainable and competitive forestry practices and policies that contribute to building and maintaining a knowledge economy and scientific research in a vibrant forestry sector | DAFM | See 43 and 210 above. | C |
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