SWOT analysis for the CAP Strategic Plan post 2020

Irish Farmers’ Association Submission
11th October 2019
**Objective 1 Support viable farm income and resilience across the Union to enhance food security**

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESS</th>
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<tbody>
<tr>
<td>S1: Agriculture – largest indigenous sector in the economy employing 173,000 people and representing nearly 8% of total employment in the Irish economy.</td>
<td>W1: Low income in agri-sector compared to other sectors of the economy (this needs to be spelt out in the comparison of farm income versus non-farm income)</td>
</tr>
<tr>
<td>S2: Temperate climate conducive for our grass-based production systems</td>
<td>W2: Low profitability / viability in some sectors Viable 32%/sustainable 34%/vulnerable 34%</td>
</tr>
<tr>
<td>S3: Low level of debt on Irish farms (international comparison?)</td>
<td>W3: Increase in input costs (also services costs increasing)</td>
</tr>
<tr>
<td>S4: Viability of some sectors S5: Effective development and delivery of schemes supporting family farm income</td>
<td>W4: Highly dependent on CAP payments particularly for some sectors - % of farmers that are highly dependent on CAP payments?</td>
</tr>
<tr>
<td>S6: Agriculture has a positive image in society</td>
<td>W5: Low level of income and farm system diversification to mitigate risk (diversification is an option for a limited number of farmers, also diversification is not the only method of risk mitigation. In the context of securing employment to support family farm income, opportunities are very limited in many regions)</td>
</tr>
<tr>
<td>S7: CAP contributes to high quality, safe food</td>
<td>W6: Lack of risk management tools/knowledge (tools in the CAP are not proven, and private sectors tools are not available for all sectors)</td>
</tr>
<tr>
<td>S8: Our island nation status gives us protection under animal and plant health</td>
<td>W7: Reactive nature of ad hoc schemes to address weather and other crises in the sector. This is not a weakness, as it is imperative on Governments to deal with crises which emerge due mainly to weather events.</td>
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<td>W8: FW 2025 fails to prioritise farm income and profitability.</td>
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</tbody>
</table>
O1: Use of new technologies to reduce input costs and increase efficiency (e.g. precision farming) The voluntary IFA and EPA Smart Farming initiative is a good example of how farmers can make savings and enhance the rural environment through better resource management on their farm and through targeted incentives.
This is particularly relevant to the low income sectors (livestock, sheep, tillage) where incomes are low and making necessary investment is essential.
O2: Growth of bio-economy provided that there is strong government support from outside of CAP (refit tariff, etc.). The growth of the bioeconomy will be dependent on supply chains, funding must be made available for farmers to establish new and existing PO’s and biomass trade centres.
O3: Increasing demand for safe, sustainable, nutritious, authentic and organic food produced to high standards of environmental protection and animal welfare
O4: Increasing global consumer demand for animal protein sources
O5: Increase value added at farm level, which can only be sustained if it is appropriately remunerated and supported.
O6: Development of risk management tools (not an opportunity in all sectors)
O7: Increase knowledge base of farmers on risk management tools (not an opportunity in all sectors)
O8: In the next food strategy to 2030, prioritise farmer income and profitability
O9: Cofinancing by governments for Pillar II measures
O10: Increased CAP payment to support genuine farmers greatly dependent on direct payments.

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<td><strong>T1:</strong> Ongoing price volatility in global markets <strong>T2:</strong> BREXIT/Mercosur <strong>T3:</strong> Reduced CAP budget, convergence downwards for genuine farmers who are greatly dependent on direct payments. <strong>T3a:</strong> Cofinancing by governments for Pillar II measures <strong>T4:</strong> Costs of compliance with EU’s higher environmental and sanitary production standards, and additional asks from farmers relating to climate change. <strong>T5:</strong> Effects of Climate change and trade policy on primary production. EU trade deals with regions such as Mercosur will lead to substantial environmental degradation and increases in global greenhouse gas emissions as Amazonian forests are felled to meet trade opportunities arising from EU trade deals, while Irish and European farmers are expected to farm to the highest environmental and animal welfare standards. <strong>T6:</strong> Demographics and the need for generational renewal to increase up take of new technology <strong>T7:</strong> Increase National/ EU regulation <strong>T8:</strong> Divergence between EU trade and CAP policies</td>
</tr>
<tr>
<td><strong>O2:</strong> Growth of bio-economy provided that there is strong government support from outside of CAP (refit tariff, etc.). The growth of the bioeconomy will be dependent on supply chains, funding must be made available for farmers to establish new and existing PO’s and biomass trade centres.</td>
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<td><strong>O10:</strong> Increased CAP payment to support genuine farmers greatly dependent on direct payments.</td>
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**Objective 2 Enhance market orientation and increase competitiveness, including greater focus on research, technology and digitalisation**

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<tr>
<td>S1: Increased exports and value-added targets at the heart of the sectors ten-year strategy FW 2025</td>
<td>W1: Difficult to avail of / achieve economies of scale</td>
</tr>
<tr>
<td>S2: Growing trade surplus with EU and non-EU</td>
<td>W2: Wide variation in levels of innovation and adoption of new technologies, with particular difficulties for low income sectors</td>
</tr>
<tr>
<td>S3: Temperate climate provides competitive advantage for grass-based production systems</td>
<td>W3: Variation in investment across sectors</td>
</tr>
<tr>
<td>S4: Investment levels are increasing</td>
<td>W4: Lack of access to high speed broadband in rural areas</td>
</tr>
<tr>
<td>S5: Farm productivity levels are increasing partly through efficiencies, in some sectors</td>
<td>W5: Lack of innovation infrastructure (meaning?)</td>
</tr>
<tr>
<td>S6: Credibility of our sustainable Quality Assurance Schemes in international markets</td>
<td>W6: Lack of Producer Organisations (co-ops, marts, horticulture, forestry sectors)</td>
</tr>
<tr>
<td>S7: Strong animal health and disease controls standards</td>
<td>W7: Overreliance on individual markets eg UK</td>
</tr>
<tr>
<td>S8: Wide range of State support for research, innovation and competitiveness</td>
<td>W8: Costs of compliance with EU’s higher environmental and sanitary production standards</td>
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<tr>
<th><strong>OPPORTUNITIES</strong></th>
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<tr>
<td>O1: Increasing demand for safe, sustainable, nutritious, authentic, organic food produced to high standards of environmental protection and animal welfare</td>
<td>T1a: Willingness of market place to pay for the safe, sustainable....Food it demands</td>
</tr>
<tr>
<td>O2: Improve access to credit, however, this is proving to be a difficulty with Brexit uncertainty in the background.</td>
<td>T1b: Certain sectors have chronically low incomes</td>
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<tr>
<td>O3: Import substitution e.g. protein crops, feedstuffs, including grass; energy</td>
<td>T1: Market volatility, price variations</td>
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<tr>
<td>O4: Use of new technologies to reduce input costs, increase efficiency</td>
<td>T2: Rising cost of inputs and services</td>
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and add value, through the continuous work of programmes including the IFA and EPA led Smart Farming programme.

O5: Further develop Circular economy and bio-economy and introduce supports to develop supply chains.

O6: Open new markets and expand existing markets, however, many of those new markets do not return on par with our traditional markets.

O7: Encourage greater producer participation in Producer Organisations – this is only an opportunity for certain sectors, and it only makes sense for farmers if it delivers improved prices.

O8: Co-operation with Research Institutions to facilitate technological innovations and digitalisation

T4: Capability and capacity of sector to adjust to new demands/challenges

T5: Labour shortages at both primary and secondary stages of production

T6: Costs of compliance with EU’s higher environmental, climate and sanitary production standards
### Objective 3 improve the farmers’ position in the value chain

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<tr>
<td>S1: Sustainable Quality Assurance Schemes</td>
<td>W1: Share of value added reducing for primary producer (because it depends on what the retail price is – a large share of a low retail price is of no value to the farmer)</td>
</tr>
<tr>
<td>S2: Producer Organisations in Horticulture &amp; Forestry sector</td>
<td>W2: Share of value added below EU average (reference?)</td>
</tr>
<tr>
<td>S3: Cooperative structure in the dairy sector</td>
<td>W3: Fragmented nature of sector</td>
</tr>
<tr>
<td>S4: Contract prices in dairy sector</td>
<td>W4: Costs of compliance with EU’s higher environmental and sanitary production standards</td>
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<tr>
<td>S5: EU initiatives focusing on greater transparency in the food chain</td>
<td>W5: Low number of Irish PDOs/PGIs &amp; TSGs (While important, this is very niche and depends on strong local market)</td>
</tr>
<tr>
<td>S5a: EU Directive on UTPs</td>
<td>W6: Lack of accurate data for value chain – transparency as important as accuracy</td>
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<tr>
<td>O1: Demands for higher standards create opportunities for higher prices</td>
<td>T1: Failure of market to fairly remunerate the primary producer</td>
</tr>
<tr>
<td>O1a: Advances in animal and crop breeding technologies must be prioritised</td>
<td>T1a: Market volatility, price variations and input costs</td>
</tr>
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T2: Costs of compliance with EU’s higher environmental, climate and sanitary production standards
### O1b: Development of contractual relationships between farmers and processors.
This may be appropriate for sectors other than dairy.

### O1c: Growing demand for ‘natural’ based food production systems provides opportunities for premiumisation by primary producers – our high export orientation limits the opportunities for premiumization.

### O2: Consumer demand for local produce (as above)

### O3: Some potential expansion of organic farming sector – we do not have a big home market through which to optimize the value.

### O4: Increase the number of Producer Organisations (particularly relevant to certain sectors, also limited scope to improve farmers’ remuneration).

### O5: Introduction of legislation to protect primary producers, with engagement with stakeholders and introduction of independent regulatory authority other than the CCPC – the legislation provides for an Independent Food Regulator.

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<th>T3: Changing consumer tastes</th>
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<td>T4: Emerging anti-animal protein/farming agenda</td>
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**Objective 4: Contribute to climate change mitigation and adaption, as well as sustainable energy**

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<tr>
<th><strong>Strengths</strong></th>
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<tbody>
<tr>
<td>S1: National aim of an approach to carbon neutral in agriculture and land use sector, which does not compromise sustainable food production.</td>
<td>W1: Highest share of GHG emissions comes from agriculture, as Ireland does not have significant large scale industrial manufacturing.</td>
</tr>
<tr>
<td>S2: Grass based production system with low carbon footprint</td>
<td>W2: Agricultural GHG emissions are increasing, but remain below 1990 baseline year.</td>
</tr>
<tr>
<td>S3: High % Utilised Agricultural Area in Ireland is permanent grassland</td>
<td>W3: Dairy herd expansion is faster than mitigation capacity</td>
</tr>
<tr>
<td>S4: Significant national cover of hedgerows, individual trees &amp; non-forest woodland</td>
<td>W4: Ireland has one of the lowest levels of forest cover in Europe</td>
</tr>
<tr>
<td>S5: Highest mean organic carbon of arable land in Europe</td>
<td>W5: Declining afforestation rates in recent years, due to measures including compulsory replanting obligations.</td>
</tr>
<tr>
<td>S6: High % of land under agri-environment-climate commitments</td>
<td>W6: Not relevant, is historical</td>
</tr>
<tr>
<td>S7: Low % of sealed soils (built environment)</td>
<td>W7: High % of non-CO2 emissions in Ireland, relative to other EU Member States, due to Ireland’s agricultural based economy.</td>
</tr>
<tr>
<td>S8: Leading innovation and research on climate related support tools</td>
<td>W8: Nitrates derogation farms are a very significant intensive farming cohort over recent years. The number of farmers in derogation has remained broadly unchanged at 7,000 (aprox)</td>
</tr>
<tr>
<td>S9: Established beef and dairy breeding programmes</td>
<td>W9: Sub-optimal soil fertility</td>
</tr>
<tr>
<td>S10: High level of carbon auditing on beef and dairy farms</td>
<td>W10: Limited investment in the sectoral research (horticulture)</td>
</tr>
<tr>
<td>S11: Robust ensemble of climate model projections for Ireland in place</td>
<td>W11: Reliance on peat in horticultural sector</td>
</tr>
<tr>
<td>S12: Carbon efficient protected crop sector</td>
<td>W12: Increasing annual supply gap for forestry biomass in Ireland</td>
</tr>
<tr>
<td>S13: Low levels of direct use of energy in primary agriculture and forestry sector</td>
<td>W13: Some forests are not managed to their productive potential</td>
</tr>
<tr>
<td>S14: Ireland has a large availability of feedstock and agricultural residues for biobased product and bioenergy production</td>
<td>W14: Economics of anaerobic digestion (AD) plants are challenging, especially in the absence of necessary government supports.</td>
</tr>
<tr>
<td>S15: Well established co-operatives capable of enabling farmer engagement in climate actions and energy – primarily relevant to dairy sector.</td>
<td>W15: Capital costs for many renewable energy projects are significant</td>
</tr>
<tr>
<td>S16: Farm Advisory System which can quickly disseminate new</td>
<td>W16: Difficulties in accessing the national grid</td>
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innovations and knowledge transfer
S17: 11% of our land area is under forest with plan to increase this by 8,000 ha per annum.
S18: Nutrient management plans currently being carried out on Nitrates Derogation Farms and GLAS farms.

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<tr>
<th>Opportunities</th>
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<tbody>
<tr>
<td>O1: Introduction of measures in the GHG (and ammonia) Marginal Abatement Cost Curve (MACC)</td>
<td>T1: Continued increase in agriculture emissions</td>
</tr>
<tr>
<td>O1a: IFA and EPA Smart Farming initiatives must be built upon</td>
<td>T2: Livestock production and emissions of GHG’s remain strongly coupled</td>
</tr>
<tr>
<td>O2: Reducing nitrogen emissions</td>
<td>T3: Ammonia emissions in breach of targets set</td>
</tr>
<tr>
<td>O3: Improve livestock management including through extended grazing</td>
<td>T4: Inappropriate (meaning?) land-use/soil management</td>
</tr>
<tr>
<td>O4: Improved animal production efficiency, including through targeted supports</td>
<td>T5: Low profitability and low average farm size of beef and sheep sectors could reduce the adoption of climate appropriate practices</td>
</tr>
<tr>
<td>O5: Improve on-farm slurry management</td>
<td>T6: Slowdown in generational renewal could affect uptake of climate appropriate practices</td>
</tr>
<tr>
<td>O6: Better Management of Peatlands</td>
<td>T7: Increased frequency and intensity of some extreme climatic events</td>
</tr>
<tr>
<td>O7: Improved soil management and fertility</td>
<td>T8: Increased disease and pest pressures</td>
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<tr>
<td>O8: Increasing relatively low level of forest cover and favourable growing conditions, also agro-forestry</td>
<td>T9: Risk of “carbon leakage” if production in Ireland declines</td>
</tr>
<tr>
<td>O9: Support diversification to lower carbon intensity farming and to meet bioenergy demands</td>
<td>T10: Difficulty in ensuring security of supply for biomass feedstocks</td>
</tr>
<tr>
<td>O10: Further efficiency gains through the roll-out of agri-digitalisation, smart farming and precision farming technology</td>
<td>T11: Capital investment costs and lack of support for Anaerobic Digestors could be prohibitive to uptake</td>
</tr>
<tr>
<td>O11: Up-skill advisory service and engagement with stakeholders/industry</td>
<td>T12: Target for forestry as set out in Climate Action Report will not be met unless (i) the replanting obligation is relaxed, (ii) the land eligible under the scheme is increased, (iii) the costs and administrative procedures are reduced and (iv) greater flexibility under the afforestation scheme.</td>
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<tr>
<td>O12: Changing climate allows diversification of crop type</td>
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<tr>
<td>O13: Advances in crop breeding and plant genetics - but limited by societal expectations</td>
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<tr>
<td>O14: Increase productivity and resilience of the national forest estate</td>
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<tr>
<td>O15: Reduce energy consumption on farms through energy efficiency and deployment of renewables</td>
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<tr>
<td>O16: Use renewable biological resources to create value added bio-based products</td>
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<tr>
<td>O17: Network of Agricultural Colleges makes educating the next generation of farmers in environmentally efficient farming methods easier</td>
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<tr>
<td>O18: Use of farm advisory services through the Knowledge Transfer programme. Improve access to education for farmers, by facilitating e-Learning and distant learning, as a KT method.</td>
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<tr>
<td>O19: An opportunity exists to support farmers through a combination of Eco-Schemes under Pillar I and an enhanced Agri-Environmental programme under Pillar II. In addition, a significant amount of Ireland’s land area is in Natura areas or of high natural value. This should be used in the carbon calculation for Irish agriculture as a significant amount of CO2 is locked up in this valuable resource.</td>
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<tr>
<td>O20: Explore option to reflect carbon storage performance associated with land based enterprise</td>
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### Draft SWOT analysis for the CAP Strategic Plan post 2020

**Objective 5: Foster sustainable development and efficient management of natural resources such as water, soil and air**

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<th><strong>Weaknesses:</strong></th>
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<tbody>
<tr>
<td>S1: Highest mean organic carbon of arable land in Europe</td>
<td>W1: Increase in livestock numbers in certain areas and sectors</td>
</tr>
<tr>
<td>S2: Low levels of soil erosion by water</td>
<td>W2: Increase in chemical fertiliser sales in certain areas, but</td>
</tr>
<tr>
<td>S3: Low level of concentration of nitrates in freshwater in Ireland</td>
<td>increased phosphorous efficiency on farms</td>
</tr>
<tr>
<td>S4: High % farms with extensive stocking rate</td>
<td>W3: Impact of agricultural activity on water quality</td>
</tr>
<tr>
<td>S5: Legislative framework and strong policy framework in place</td>
<td>W4: Increasing area under Nitrate derogation</td>
</tr>
<tr>
<td>S6: Strong engagement of industry and advisors to improve water quality</td>
<td>W5: Sub-optimal soil fertility</td>
</tr>
<tr>
<td>S7: High % of land under agri-environment-climate commitments and designated Natura land 13%.</td>
<td>W6: Ongoing drainage of organic soils (grasslands and wetlands), particularly by semi-State bodies. (this is historical, and not relevant)</td>
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<tr>
<td>S8: Low % of sealed soils (built environment)</td>
<td>W7: Ongoing drainage of peatlands – evidence of this required.</td>
</tr>
<tr>
<td>S9: Significant national cover of hedgerows, individual trees &amp; non-forest woodland (measurement, figure?)</td>
<td>W8: No legislation in place regarding the protection of soil – Soils are currently protected under GAEC and general cross compliance measures that all farmers in receipt of a basic payment are required to adhere to.</td>
</tr>
<tr>
<td>S10: Peatlands cover over 20% of Ireland’s area</td>
<td>W9: Low level of forest cover</td>
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<tr>
<td>O1: Improve water quality and implement catchment-based approach</td>
<td>T1: Deterioration in water quality from various sources, and in some areas only</td>
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<tr>
<td>O2: Roll-out of the Agricultural Sustainability Support &amp; Advisory Programme</td>
<td>T2: Agricultural activities impact on the environment, as do all other economic, residential and local authority activities</td>
</tr>
<tr>
<td>O3: Incentivise low input farming such as organic farming</td>
<td>T3: Ammonia emissions in breach of targets set</td>
</tr>
<tr>
<td>O3a: A significantly improved agri-environment scheme to reach a target of at least 70% of Irish farmers (currently GLAS takes in around 40%). Farmers have shown in the past that where they are incentivised to do so, they will partake strongly in agri-environment</td>
<td>T4: Inappropriate emissions soil management (what is the evidence for this?)</td>
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<td>T5: Low profitability and low average farm size of beef and sheep sectors could reduce the adoption of environmentally friendly</td>
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schemes. E.g. at peak in REPS, 63,000 farmers participated, representing 50% of farmers.
O4: Reduce fertiliser application
O5: Reducing nitrogen and ammonia emissions
O6: Improve on-farm slurry management
O7: Better Management of Peatlands
O8: Improved soil management and fertility
O9: Further efficiency gains through the roll-out of agri-digitalisation, Smart Farming and precision farming technology
O10: Foster a greater understanding of environmental issues at farm level
O11: Increased afforestation and agroforestry
O12: improve soil fertility through liming programme

practices
T6: Slowdown in generational renewal could affect uptake of climate appropriate practices
T7: Changing climatic conditions
T8: Lack of appropriately supportive schemes which farmers can avail of
**Objective 6 - Contribute to the protection of biodiversity, enhance ecosystem services and preserve habitats and landscapes**

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<th><strong>Strengths:</strong></th>
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<tr>
<td>S1a: Over the last 25 years, agri-environmental schemes have significantly improved biodiversity on farms</td>
<td>W1: Some habitats have an unfavourable status (reference?)</td>
</tr>
<tr>
<td>S1: Majority of threatened species are in favourable and stable status</td>
<td>W2: Some Farmland bird species are in decline (reference?)</td>
</tr>
<tr>
<td>S2: Ireland has a network of Natura 2000 sites corresponding to 13% of the national area</td>
<td>W3: Woodlands are deemed to be in bad but stable status (reference?)</td>
</tr>
<tr>
<td>S3: High percentage of extensive grazing</td>
<td>W4: Grassland habitats have undergone significant losses over last 10-15 years (reference?)</td>
</tr>
<tr>
<td>S4: An estimated 2.1 million hectares has the potential to be managed as High Nature Value farmland</td>
<td>W5: Ongoing drainage of peatlands (reference? This is historical)</td>
</tr>
<tr>
<td>S5: Significant national cover of hedgerows, individual trees &amp; non-forest woodland</td>
<td>W6: Lack of policy coherence e.g. removal of scrub – this is a perverse effect of the eligibility rules</td>
</tr>
<tr>
<td>S6: Peatlands, an important habitat, cover over 20% of Ireland’s area</td>
<td>W7: More species mix needed in forestry planting. If the level of broadleaf planting is to increase farmers will need a payment beyond the current 15 years, an eco-systems service type payment needs to be introduced for land set aside as ABEs and broadleaf woodlands.</td>
</tr>
<tr>
<td>S7: Strong policy framework to protect and enhance biodiversity</td>
<td>W8: Lack of economic value attributed to public goods provided by non-productive land</td>
</tr>
<tr>
<td>S8: Good knowledge and experience of delivery of results-based agri-environment schemes</td>
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<tr>
<td>S9: High plant health status in Ireland</td>
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<td>O1: Incentivise the provision of ecosystem services including HNV farming – through agri-environment scheme</td>
<td>T1: Habitat loss due to changes in land uses</td>
</tr>
<tr>
<td>O2: Enhance biodiversity and establish new habitats on more intensive farms – agri environment scheme</td>
<td>T3: Agriculture intensification in some areas</td>
</tr>
<tr>
<td>O3: Appropriate management of forests and increase afforestation levels (particularly mixed forestry)</td>
<td>T4: Under grazing or land abandonment in some areas, mainly in marginal land</td>
</tr>
<tr>
<td>O4: Incentivise low input farming such as organic farming</td>
<td>T5: Agricultural activities impact on the environment along with other non-farming sectors</td>
</tr>
<tr>
<td>O5: Combat invasive species</td>
<td>T6: Increase in invasive species</td>
</tr>
<tr>
<td></td>
<td>T7: Climate change</td>
</tr>
<tr>
<td>O6: Foster a greater understanding of environmental issues at farm level</td>
<td>T8: Slowdown in generational renewal, especially in some sectors, could affect uptake of environmentally friendly practises</td>
</tr>
<tr>
<td>O7: Engage industry and the wider community on biodiversity related initiatives</td>
<td>T9: Pollinators species are in decline and there is a risk of loss of species</td>
</tr>
<tr>
<td>O8: Maximise use of available resources on environmental farm profiling (Please clarify this statement)</td>
<td></td>
</tr>
</tbody>
</table>
### Objective 7 - Attract young farmers and facilitate business development in rural areas

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>S1: Training of young farmers is well above EU average (reference?)</td>
<td>W1a: Low income in agri-sector compared to other sectors of the economy</td>
</tr>
<tr>
<td>S2: Access to knowledge</td>
<td>W1: Young farmers account for only 6.1% of the total population of farm managers.</td>
</tr>
<tr>
<td>S3: Effective design and implementation of support for Young Farmers</td>
<td>W1a: Age profile of Irish farming population – over 55 y.o. 55%; under 35 y.o. 5.4% CSO Farm Structure Survey 2013</td>
</tr>
<tr>
<td>S4: Taxation supports for young farmers</td>
<td>W2: Access to land for purchase or lease</td>
</tr>
<tr>
<td>S5: Land mobility service</td>
<td>W3: Access to credit</td>
</tr>
<tr>
<td>S6: Contribution of agri-food sector to rural economy</td>
<td>W4: Land mobility</td>
</tr>
<tr>
<td>S7: Off farm employment opportunities, though not in all areas</td>
<td>W4a: Land fragmentation</td>
</tr>
<tr>
<td>S8: Substantial agri-food industry with diverse geographic spread</td>
<td>W5: Lack of diverse employment opportunities compared to large urban centres</td>
</tr>
<tr>
<td>S9: Strong tourism sector, in certain areas</td>
<td>W7: Social isolation</td>
</tr>
<tr>
<td>S10: Downstream multiplier effect on employment in the forestry sector, also valid for all agricultural sectors.</td>
<td>W8: Low female participation in farming</td>
</tr>
<tr>
<td></td>
<td>W9: Lack of broadband coverage more relevant to the younger generation</td>
</tr>
<tr>
<td></td>
<td>W10: Lack of incentive for older farmers to retire – not many farms can generate 2 incomes for 2 different generations</td>
</tr>
</tbody>
</table>

### OPPORTUNITIES

### THREATS
<table>
<thead>
<tr>
<th>O1: Continue to increase rates of full and basic training for young farmers.</th>
<th>T1: Income volatility in certain sectors</th>
</tr>
</thead>
<tbody>
<tr>
<td>O2: Access to digital technologies</td>
<td>T1a: Chronically low incomes in certain sectors</td>
</tr>
<tr>
<td>O3: Build on range of supports available for Young Farmers</td>
<td>T2: Reduction in existing young farmer supports</td>
</tr>
<tr>
<td>O4: Develop career pathways in agriculture</td>
<td>T3: Decline in young farmer numbers</td>
</tr>
<tr>
<td>O5: Develop tourism industry in rural areas in a sustainable way</td>
<td>T4: Lower levels of services and over reliance on traditional employment options</td>
</tr>
<tr>
<td>O6: Increase employment rates, and expand employment options in rural areas</td>
<td>T5: Changing nature of retail, service delivery and town centre living</td>
</tr>
<tr>
<td>O7: Increase opportunities for rural female entrepreneurs and female farmers</td>
<td>T6: Not maximising opportunities presented by digital economy</td>
</tr>
<tr>
<td>O8: Optimising digital connectivity for employment (eg remote working)</td>
<td>T7: Brexit</td>
</tr>
<tr>
<td>O9: Land mobility service already established can be built upon</td>
<td>T8: Social isolation leading to health issues</td>
</tr>
</tbody>
</table>
**Objective 8: promote employment, growth, social inclusion and local development in rural areas, including bio-economy and sustainable forestry;**

<table>
<thead>
<tr>
<th><strong>STRENGTHS</strong></th>
<th><strong>WEAKNESSES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>S1: Dedicated Government Department for Rural Development</td>
<td>W1: Number of social groups at risk of social exclusion, isolation and poverty deprivation</td>
</tr>
<tr>
<td>S2: Whole of Government approach through Action Plan for Rural Development</td>
<td>W2: Low levels of women working in agriculture</td>
</tr>
<tr>
<td>S3: Project Ireland 2040 has strategic objective of Strengthened Rural Economies and Communities</td>
<td>W3: Lower levels of, or limited access to services including transport infrastructure compared to large urban centres</td>
</tr>
<tr>
<td>S4: Strong Community involvement and commitment to engage and deliver locally</td>
<td>W4: Lack of diverse employment opportunities compared to large urban centres</td>
</tr>
<tr>
<td>S5: Coherent approach to local development with integrated structure for delivery</td>
<td>W5: Fragmented nature of forestry sector and absence of career path</td>
</tr>
<tr>
<td>S6: Substantial agri-food industry with diverse geographic spread</td>
<td>W6: High value markets are poorly developed for hardwood resource</td>
</tr>
<tr>
<td>S7: Strong tourism sector in certain areas with recreational developments more prevalent in certain areas.</td>
<td>W7: Lack of awareness of the circular and the Bio economy</td>
</tr>
<tr>
<td>S8: Good quality of life combined with culture and heritage resources</td>
<td>W8: Dispersed nature of SMEs in all agri-sectors</td>
</tr>
<tr>
<td>S9: Coherent Government Strategy for the bioeconomy</td>
<td>W9: Costs associated with establishing businesses is higher in rural areas</td>
</tr>
<tr>
<td>S10: Dedicated national implementation activities for the bioeconomy</td>
<td>W10: Lack of broadband availability limiting the development of SMEs and tourism projects.</td>
</tr>
<tr>
<td>S11: Successive publicly funded forestry programmes will result in strong projections for timber output from Irish forests to 2030</td>
<td></td>
</tr>
<tr>
<td>S12: Downstream multiplier effect on employment in the forestry sector also valid for other SMEs in the agri-sector.</td>
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**OPPORTUNITIES**

<table>
<thead>
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O1: Building capacities of communities (enabling and supporting rural communities)
O1a: Provision of renewable energy sources, including through community-based schemes
O2: Develop tourism industry in rural areas in a sustainable way
O3: Improve availability of, and access to, necessary services in rural areas
O4: Increase employment rates, and expand employment options in rural areas
O5: Increase opportunities for rural female entrepreneurs and female farmers
O6: Optimising digital connectivity for employment (eg remote working)
O7: Maximise the economic and social potential of the bio economy and circular economy
O9: Increase afforestation rates
O10: Increase opportunities for diversification of farm enterprise
O11: Increased market opportunities for wood particularly in the construction and energy sectors
O12: Maximising the potential of recreational tourism through the Walkways scheme and the development of Greenways.

T1: Demographic profile and the need for generational renewal
T2: Lower levels of services and over reliance on traditional employment options
T3: Changing nature of retail, service delivery and town centre living
T4: Climate Change – economic, social and environmental impacts
T5: Increased compliance and regulatory requirements for Community and Voluntary Sector
T6: Rural isolation, with a particular recognition of its impact on mental health
T7: Not maximising opportunities presented by digital economy
T8: Brexit
T10: Forestry – emerging plant pests and diseases. The treatment of farmers with Ash Dieback and the removal of supports without a replacement scheme has been very damaging to farmers involvement in forestry.
Objective 9: Improve the response of EU agriculture to societal demands on food and health, including safe, nutritious and sustainable food, food waste, as well as animal welfare

<table>
<thead>
<tr>
<th>Strength</th>
<th>Weakness</th>
</tr>
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<tbody>
<tr>
<td>S1: National Plan on Antimicrobial Resistance increasing awareness of AMR amongst farmers and vets and providing detailed information and guidance through industry developed and agreed ‘Codes of Practice’ to reduce antibiotic need and ensure optimum standards in prescribing and use of antibiotics when needed. Development of monitoring systems to evaluate the levels and type of usage of antibiotics.</td>
<td>W1:</td>
</tr>
<tr>
<td>S2: Antibiotics usage in Ireland is below the EU average (reference!)</td>
<td>W2: (key output of the National Plan on Antimicrobial Resistance)</td>
</tr>
<tr>
<td>S3: National Plan on the Sustainable use of Pesticides</td>
<td>W3: (Developed in the National Plan on Antimicrobial Resistance)</td>
</tr>
<tr>
<td>S4: National Farmed Animal Health Strategy</td>
<td>W4: Low level of organic farming in Ireland</td>
</tr>
<tr>
<td>S5: Animal Welfare Strategy</td>
<td>W5: Reliance on imports of certain animal feeds</td>
</tr>
<tr>
<td>S6: The establishment of Animal Health Ireland which facilitates the development and implementation of industry led disease eradication and control programmes and animal health and welfare initiatives</td>
<td>(Sustainability and assurance schemes fulfil this function)</td>
</tr>
<tr>
<td>S7: Agri-food industry supporting initiative in animal health and welfare</td>
<td>W7: Lack of coherent approach to bio security measures</td>
</tr>
<tr>
<td>S8: Food safety and Food Authenticity Strategy (?)</td>
<td>W8: Lack of accurate data on food waste</td>
</tr>
<tr>
<td>S9: Sustainable Healthy Agri-Food Research Plan</td>
<td>W9: lack of direct incentives and tools to assist and support farmers</td>
</tr>
<tr>
<td>S10: Strategy for the Development of the Organic Sector</td>
<td></td>
</tr>
<tr>
<td>S11: Increasing percentage of UAA organically farmed</td>
<td></td>
</tr>
<tr>
<td>S12: Quality Assurance Schemes</td>
<td></td>
</tr>
<tr>
<td>S13: National Food Waste reduction schemes</td>
<td></td>
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</tbody>
</table>
S14: Irish farmers produce quality, flavoursome foods

**Opportunity**
- O1: Improvements and developments of vaccines
- O2: (Key output of the National Action Plan on Antimicrobial Resistance)
- O3: Increasing consumer demand for Organic produce / sustainably produced food
- O4: Increasing consumer demand / awareness for provenance of food vis a vis safety and health and welfare of animals
- O5: Provide supports and incentives for farmers engaging targeted advisory service on animal health
- O6: Synergies between various strategies (meaning?)
- O7: Prohibit substandard agri produce imports to the community

**Threat**
- T1: Increased levels of intensive farming in certain areas and sectors
- T2:
- T3: Climate change
- T4: Slowdown in generational renewal could affect uptake of appropriate practices
- T5: New and emerging diseases
- T6: Increased regulation and cost of compliance
- T7: Failure of market to remunerate farmers for the higher societal standards
- T8: Failure to protect EU farmers and producers from sub-standard imports to the community
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Draft SWOT analysis for the CAP Strategic Plan post 2020