ASA

agricultural science association

ASA Submission in response to the Public Consultation on the SWOT Analysis for the CAP Strategic Plan

October 2019

[redacted]

PUBLIC CONSULTATION ON THE SWOT ANALYSIS FOR THE CAP STRATEGIC PLAN

RESPONSE FORM

1. **Details:**

Full Name: Agricultural Science Association (ASA)

Organisation where applicable: Agricultural Science Association (ASA)

Please tick one of the following options that best describes you;

Farmer (full-time)	☐	Farmer (part-time)	☐	Farm family member	☐
Member of the public	☐	Other	☐		

2. **Are you involved in:**

Agriculture	☐	Forestry	☐	Farm Organisation	☐
Rural Development	☐	Food industry	☐	Environment	☐
Community Sector	☐	Research	☐	Civil Society / NGO	☐

Other: The Agricultural Science Association (ASA) is the professional body for graduates in agriculture, horticulture, forestry and food science and technology. Our almost 2,000 members are employed across the entire agri-food industry, most notably within government departments, research, advisory, education and training, agri-business, rural organizations and the media.

The ASA has considerable interest in and an important part to play in the shape of Ireland's agri-food industry into the future. ASA members are committed to the development of a profitable, sustainable and competitive Irish agri-food sector that meets current and future needs. To this end ASA appreciates the opportunity to make a submission in response to DAFM's public consultation on the draft SWOT Analysis for the CAP Strategic Plan Post-2020.

The ASA agrees with the majority of the points set out in DAFM's draft SWOT Analysis and it has taken this opportunity to suggest some further points for consideration as well as some possible amendments. The ASA's views around the draft SWOT Analysis are set out in Appendix 1.

Appendix 1:

DAFM draft SWOT Analysis for CAP Strategic Plan post-2020 with ASA comments and suggestions shown as tracked changes

Objective 1 Support viable farm income and resilience across the Union to enhance food security

STRENGHTS	WEAKNESS
S1: Agriculture – largest indigenous sector in the economy S2: Temperate climate conducive for our grass-based production systems S3: Low level of debt on Irish farms S4: Viability of some sectors S5: Effective development and delivery of schemes supporting family farm income S6: Potential reach of agricultural advisory service S7: Predominantly based around a family farm structure with strong commitment to the industry	W1: Low income in agri-sector compared to other sectors of the economy W2: Low profitability / viability in some sectors W3: Increase in input costs W4: Highly dependent on CAP payments W5: Low level of diversification to mitigate risk W6: Lack of risk management tools/knowledge W7: Reactive nature of ad hoc schemes to address weather and other crises in the sector. W8: Limited farmer engagement with advisory service
OPPORTUNITIES	**THREATS**
O1: Use of new technologies to reduce input costs and increase efficiency (e.g. precision farming) O2: Growth of bio-economy 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 protein sources O5: Increase value added at farm level (ASA question what exactly this means) O6: Development of risk management tools O7: Increase knowledge base of farmers on risk management tools	T1: Ongoing price volatility in global markets T2: BREXIT T3: Reduced CAP budget T4: Costs of compliance with EU's higher environmental and sanitary production standards T5: Effects of Climate change on primary production T6: Demographics and the need for generational renewal to increase up take of new technology T7: Increase in National/ EU regulation T8: Absence of new entrants T9: Public perceptions around certain production systems

Objective 2 Enhance market orientation and increase competitiveness, including greater focus on research, technology and digitalisation

STRENGTHS	WEAKNESS
S1: Increased exports and value-added targets at the heart of the sectors ten-year strategy FW 2025 (ASA believe this statement should be replaced by facts to show progress in this regard. If progress has not been made it should not be considered as a "strength".) S2: Growing trade surplus with EU and non-EU S3: Temperate climate provides competitive advantage for grass-based production systems S4: Investment levels are increasing (ASA query if this refers to dairy farms, food processing industry or both) S5: Farm productivity and efficiency levels are increasing S6: Reputation of sustainable Quality Assurance Schemes S7: Strong animal health and disease controls standards S8: Wide range of State support for research, innovation and competitiveness	W1: Difficult to avail of / achieve economies of scale W2: Wide variation in levels of innovation and adoption of new technologies W3: Variation in investment across sectors W4: Lack of access to high speed broadband in rural areas W5: Lack of innovation infrastructure (ASA question what exactly this means) W6: Lack of Producer Organisations in certain sectors W7: Overreliance on individual markets eg UK W8: Costs of compliance with EU's higher environmental and sanitary production standards W9: Limited dissemination to and application of research outcomes by industry W10: Weak response to price signals W11: Limited ability to raise capital by those who are investing in research / innovation W12: General lack of scale at farm level
OPPORTUNITIES	**THREATS**
O1: Increasing demand for safe, sustainable, nutritious, authentic, organic food produced to high standards of environmental protection and animal welfare O2: Improve access to credit	T1: Market volatility, price variations T2: Rising cost of inputs T3: Effects of climate change on primary production T4: Capability and capacity of sector to adjust to new demands/

O3: Import substitution e.g. protein crops, feedstuffs O4: Use of new technologies to reduce input costs, increase efficiency and add value O5: Further develop Circular economy and bio-economy O6: Open new markets and expand existing markets O7: Encourage greater producer participation in Producer Organisations O8: Co-operation with Research Institutions in technological innovations and digitalisation O9: Develop potential of advisory service to effect change at farm level. O10 Utilise verifiable data to support change	challenges T5: Labour shortages at both primary and secondary stages of production (ASA believes this exists already and as such should be considered as a weakness) T6: Costs of compliance with EU's higher environmental and sanitary production standards T7: Risks associated with increasing scale of production

Objective 3 improve the farmers' position in the value chain

STRENGTHS	WEAKNESSES
S1: Sustainable Quality Assurance Schemes S2: Producer Organisations in Horticulture sector S3: Cooperative structure in the dairy sector S4: Contract prices for a proportion of milk output in the dairy sector S5: EU initiatives focusing on greater transparency in the food chain S6: Ability to market produce as grass based production	W1: Share of value added reducing for primary producer W2: Share of value added below EU average W3: Fragmented nature of sector W4: Costs of compliance with EU's higher environmental and sanitary production standards W5: Low number of Irish PDOs/PGIs & TSGs W6: Lack of accurate data for value chain W7: Low number of Producer Organisations in certain sectors W8: Dominance of the retail multiples W9: Consumers lack of appreciation for the value of food.
OPPORTUNITIES	**THREATS**
O1: Growing demand for 'natural' based food production systems provides opportunities for premiumisation by primary producers O2: Consumer demand for local produce O3: Potential expansion of organic farming sector O4: Increase the number of Producer Organisations O5: Introduction of legislation to protect primary producers O6: Advances in animal and crop breeding technologies O7: Development of contractual relationships between farmers and processors. O8: Support for innovation for agri-food business marketing value added product	T1: Market volatility, price variations and input costs T2: Costs of compliance with EU's higher environmental and sanitary production standards (ASA notes this is also listed above as a "weakness") T3: Changing consumer tastes and preferences

Objective 4: Contribute to climate change mitigation and adaption, as well as sustainable energy

Strengths	Weaknesses
S1: National aim of an approach to carbon neutral in agriculture and land use sector	W1: Highest share of GHG emissions comes from agriculture
S2: Grass based production system with low carbon footprint	W2: Agricultural GHG emissions are increasing
S3: High % Utilised Agricultural Area in Ireland is permanent grassland	W3: Dairy herd expansion is faster than mitigation capacity
S4: Significant national cover of hedgerows, individual trees & non-forest woodland	W4: Ireland has one of the lowest levels of forest cover in Europe
S5: Highest mean organic carbon of arable land in Europe	W5: Declining afforestation rates in recent years
S6: High % of land under agri-environment-climate commitments	W6: Ongoing drainage of organic soils (grasslands and wetlands)
S7: Low % of sealed soils (built environment)	W7: High % of non-CO_2 emissions in Ireland due to agriculture
S8: Leading innovation and research on climate related support tools	W8: Nitrates derogation farms are a very significant intensive farming cohort over recent years.
S9: Established beef and dairy breeding programmes	W9: Sub-optimal soil fertility
S10: High level of carbon auditing on beef and dairy farms	W10: Limited investment in the sectoral research (horticulture)
S11: Robust ensemble of climate model projections for Ireland in place	W11: Reliance on peat in horticultural sector
S12: Carbon efficient protected crop sector	W12: Increasing annual supply gap for forestry biomass in Ireland
S13: Low levels of direct use of energy in primary agriculture and forestry sector	W13: Some forests are not managed to their productive potential
S14: Ireland has a large availability of feedstock and agricultural residues for biobased product and bioenergy production	W14: Economics of anaerobic digestion (AD) plants are challenging
S15: Well established co-operatives capable of enabling farmer engagement in climate actions and energy	W15: Capital costs for many renewable energy projects are significant
S16: Farm Advisory System which can quickly disseminate new innovations and knowledge transfer	W16: Difficulties in accessing the national grid
S17: Among the most efficient beef and dairy producers in terms of green house gas emissions per unit output.	W17: Production of renewable energy at farm level is quite low
	W18: Irish farms have become less diverse which makes them more vulnerable to climate events (many are single enterprise systems)
	W19: Need to up-skill advisory service to improve industry's capacity to mitigate climate change

Opportunities	Threats
O1: Introduction of measures in the GHG (and ammonia) Marginal Abatement Cost Curve (MACC) O2: Reducing nitrogen emissions O3: Improve livestock management including through extended grazing O4: Improved animal production efficiency O5: Improve on-farm slurry management O6: Better Management of Peatlands O7: Improved soil management and fertility O8: Increasing relatively low level of forest cover and favourable growing conditions O9: Support diversification to lower carbon intensity farming and to meet bioenergy demands O10: Further efficiency gains through the roll-out of agri-digitalisation, smart farming and precision farming technology O11: Up-skill advisory service and engagement with stakeholders/industry O12: Changing climate allows diversification of crop type O13: Advances in crop breeding and plant genetics O14: Increase productivity and resilience of the national forest estate O15: Reduce energy consumption on farms through energy efficiency and deployment of renewables O16: Use renewable biological resources to create value added bio-based products O17: Network of Agricultural Colleges makes educating the next generation of farmers in environmentally efficient farming methods easier	T1: Continued increase in agriculture emissions T2: Livestock production and emissions of GHG's remain strongly coupled T3: Ammonia emissions in breach of targets set T4: Inappropriate land-use/soil management T5: Low profitability and low average farm size of beef and sheep sectors could reduce the adoption of climate appropriate practices T6: Slowdown in generational renewal could affect uptake of climate appropriate practices T7: Increased frequency and intensity of some extreme climatic events T8: Increased disease and pest pressures T9: Risk of "carbon leakage" if production in Ireland declines T10: Difficulty in ensuring security of supply for biomass feedstocks T11: Capital investment costs and lack of support for Anaerobic Digestors could be prohibitive to uptake T12: Increasing livestock numbers may erode benefits accruing from improvements in environmental efficiency with the result that national emission reduction targets may not be met T13: Slowdown in generational renewal could affect uptake of climate friendly practices

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

Strengths: S1: Highest mean organic carbon of arable land in Europe S2: Low levels of soil erosion by water S3: Low level of concentration of nitrates in freshwater in Ireland S4: High % farms with extensive stocking rate S5: Legislative framework and strong policy framework in place S6: Strong engagement of industry and advisors to improve water quality S7: High % of land under agri-environment-climate commitments S8: Low % of sealed soils (built environment) S9: Significant national cover of hedgerows, individual trees & non-forest woodland S10: Peatlands cover over 20% of Ireland's area S11: Irish farmers have a natural desire to act as custodians of the environment	**Weaknesses** W1: Increase in livestock numbers especially in certain areas W2: Increase in chemical fertiliser sales W3: Impact of agricultural activity on water quality W4: Increasing area under Nitrates derogation W5: Sub-optimal soil fertility W6: Ongoing drainage of organic soils (grasslands and wetlands) W7: Ongoing drainage of peatlands W8: No legislation in place regarding the protection of soil W9: Low level of forest cover
Opportunities O1: Improve water quality and implement catchment-based approach O2: Roll-out of the Agricultural Sustainability Support & Advisory Programme O3: Incentivise low input farming such as organic farming O4: Reduce fertiliser application O5: Reducing nitrogen and ammonia emissions O6: Improve on-farm slurry management	**Threats** T1: Further d~~D~~eterioration in water quality T2: Agricultural activities impact on the environment T3: Ammonia emissions in breach of targets set T4: Inappropriate land-use/soil management T5: Low profitability and low average farm size of beef and sheep sectors could reduce the adoption of environmentally friendly practices T6: Slowdown in generational renewal could affect uptake of ~~climate~~

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: Empower advisors and farmers to do more for environment O13: Enabling sharing of nutrient management plans across industry	~~appropriate~~more environmentally friendly farm practices T7: Changing climatic conditions

Objective 6 - Contribute to the protection of biodiversity, enhance ecosystem services and preserve habitats and landscapes

Strengths: S1: Majority of threatened species are in favourable and stable status S2: Ireland has a network of Natura 2000 sites corresponding to 13% of the area S3: High percentage of extensive grazing in West of Ireland S4: An estimated 2.1 million hectares has the potential to be managed as High Nature Value farmland S5: Significant national cover of hedgerows, individual trees & non-forest woodland S6: Peatlands, an important habitat, cover over 20% of Ireland's area S7: Strong policy framework to protect and enhance biodiversity S8: Good knowledge and experience of delivery of results-based agri-environment schemes S9: High plant health status in Ireland S10: Irish farmers have a natural desire to act as custodians of the environment	**Weaknesses** W1: Majority of habitats have an unfavourable status W2: Farmland bird species are in decline W3: Woodlands are deemed to be in bad but stable status W4: Grassland habitats have undergone significant losses over last 10-15 years W5: Ongoing drainage of peatlands W6: Lack of policy coherence e.g. removal of scrub W7: More species mix needed in forestry planting W8: Lack of economic value attributed to public goods provided by non-productive land
Opportunities: O1: Incentivise the provision of ecosystem services including HNV farming O2: Enhance biodiversity and establish new habitats on more intensive farms O3: Appropriate management of forests and increase afforestation levels (particularly mixed forestry) O4: Incentivise low input farming such as organic farming O5: Combat invasive species O6: Foster a greater understanding of environmental issues at farm	**Threats** T1: Habitat loss due to changes in land uses T2: Overgrazing of habitats T3: Agriculture intensification T4: Under grazing or land abandonment T5: Agricultural activities impact on the environment T6: Increase in invasive species T7: Climate change T8: Slowdown in generational renewal could affect uptake of environmentally friendly practises

level O7: Engage industry and the wider community on biodiversity related initiatives O8: Maximise use of available resources on environmental farm profiling O9: Potential to involve the entire farm family and especially younger people and young farmers O10: Capitalising demand for corporate social responsibility	T9: Pollinators species are in decline and there is a risk of loss of species (ASA believes this is already the case and as such should be considered as a "Weakness")

Objective 7 Attract young farmers and facilitate business development in rural areas

STRENGTHS	WEAKNESSES
S1: Training of young farmers is well above EU average S2: Access to knowledge S3: Effective design and implementation of support for Young Farmers S4: Taxation supports for young farmers S5: Land mobility service S6: Contribution of agri-food sector to rural economy S7 Off farm employment opportunities S8: Substantial agri-food industry with diverse geographic spread S9: Strong tourism sector S10: Downstream multiplier effect on employment in the forestry sector	W1: Young farmers account for only 6.1% of the total population of farm managers. W2: Access to land for purchase W3: Access to credit W4: Land mobility W5: Lack of diverse employment opportunities compared to large urban centres W6: Low income in agri-sector compared to other sectors of the economy W7: Negative perception of farming W8: Limited provision of digital infrastructure W9: Rural population decline
OPPORTUNITIES	**THREATS**
O1: Continue to increase rates of full and basic training for young farmers. O2: Access to digital technologies O3: Build on range of supports available for Young Farmers O4: Develop career pathways in agriculture O5: Develop tourism industry in rural areas in a sustainable way O6: Increase employment rates, and expand employment options in rural areas O7: Increase opportunities for rural female entrepreneurs O8: Optimising digital connectivity for employment (eg remote working) O9: Potential to utilise young model farmers to drive change O10: Better marketing of careers in agriculture and ancillary industries especially to those outside agriculture.	T1: Income volatility in certain sectors T2: Reduction in existing young farmer supports T3: Decline in young farmer numbers T4: Lower levels of services and over reliance on traditional employment options T5: Changing nature of retail, service delivery and town centre living T6: Not maximising opportunities presented by digital economy T7: Brexit

Objective 8: promote employment, growth, social inclusion and local development in rural areas, including bio-economy and sustainable forestry;

STRENGTHS	WEAKNESSES
S1: Dedicated Government Department for Rural Development S2: Whole of Government approach through Action Plan for Rural Development S3: Project Ireland 2040 has strategic objective of Strengthened Rural Economies and Communities S4: Strong Community involvement and commitment to engage and deliver locally S5: Coherent approach to local development with integrated structure for delivery S6: Substantial agri-food industry with diverse geographic spread S7: Strong tourism sector S8: Good quality of life combined with culture and heritage resources S9: Coherent Government Strategy for the bioeconomy S10: Dedicated national implementation activities for the bioeconomy S11: Successive publicly funded forestry programmes will result in strong projections for timber output from Irish forests to 2030 S12: Downstream multiplier effect on employment in the forestry sector	W1: Number of social groups at risk of social exclusion, isolation and poverty deprivation W2: Low levels of recognition for women working in agriculture W3: Lower levels of, or limited access to services including transport infrastructure compared to large urban centres W4: Lack of diverse employment opportunities compared to large urban centres W5: Fragmented nature of forestry sector and absence of career path W6: High value markets are poorly developed for hardwood resource W7: Lack of awareness of the circular and the Bio economy W8: Low levels of support for women working in rural areas W9: Poor public perception of forestry

OPPORTUNITIES	THREATS
O1: Building capacities of communities (enabling and supporting rural communities) 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 O6: Optimising digital connectivity for employment (eg remote working) O7: Maximise the economic and social potential of the bio economy and circular economy O8: Provision of renewable energy sources, including through community-based schemes 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: Education on sustainable forestry	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

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

Strength	Weakness
S1: National Plan on Antimicrobial Resistance S2: Antibiotics usage in Ireland is below the EU average S3: National Plan on the Sustainable use of Pesticides S4: National Farmed Animal Health Strategy S5: Animal Welfare Strategy S6: The establishment of Animal Health Ireland S7: Agri-food industry supporting initiative in animal health and welfare S8: Food safety and Food Authenticity Strategy S9: Sustainable Healthy Agri-Food Research Plan S10: Strategy for the Development of the Organic Sector S11: Increasing percentage of UAA organically farmed S12: Quality Assurance Schemes S13: National Food Waste reduction schemes ASA Comment: S1 and S3-S10 as well as S13 are all related to strategies/policies or schemes. To be considered "strengths" ASA believes one should consider what these have achieved. If they have not yet achieved ASA believe they should be considered "opportunities."	W1: Increased sales of antibiotics W2: Low level of understanding of AMR development and its transmission W3: Lack of available systems to monitor usage of antibiotics W4: Low level of organic farming in Ireland W5: Reliance on imports of certain animal feeds W6: Lack of robust system to measure farming effort in relation to the provision of safe food and high animal health and welfare standards. W7: Lack of coherent approach to bio security measures W8: Lack of accurate data on food waste

Opportunity	Threat
O1: Improvements and developments of vaccines O2: Development of database to monitor antibiotic usage 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: Increase targeted advisory service on animal health O6: Synergies between various strategies	T1: Risks associated with iIncreased levels of intensive farming T2: Any reduction in animal welfare standards 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: Changing public perceptions around certain production systems