Rialtas na hÉireann
Government of Ireland

SWOT analysis for the CAP Strategic Plan post 2020

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

STRENGHTS	**WEAKNESS**
S1: Animal welfare and traceability S2: Temperate climate conducive for our grass-based production systems S3: Family farm structure S4: Agriculture – largest indigenous sector in the economy S5: Low carbon intensity food production	W1: Low income in agri-sector compared to other sectors of the economy W2: Low profitability / viability in some sectors W3: Low percentage of young farmers W4: Increase in input costs W5: Highly dependent on CAP payments W6: Farmer power in the supply chain
OPPORTUNITIES	**THREATS**
O1: To improve the age demographic Q2: Use of new technologies to reduce input costs and increase efficiency (e.g. precision farming) O3: Education of consumers and farmers Q4: Increase knowledge base of farmers on risk management tools and financial matters O5: Increasing demand for safe, sustainable, nutritious, authentic, food produced to high standards of environmental protection and animal welfare	T1: Ongoing price volatility in global markets T2: Negative EU trade deals T3: Reduced CAP budget for young farmers T4: Brexit T5: Effects of Climate change on primary production T6: Future access to finance for young farmers

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

STRENGTHS S1: Temperate climate provides competitive advantage for grass-based production systems S2: Reputation of sustainable Quality Assurance Scheme and animal health and disease controls standards S3: Farm productivity and efficiency levels are increasing from low carbon intensity baseline S4: Wide range of State support for research, innovation and competitiveness S5: International reputation and increased exports and value-added targets at the heart of the sectors ten-year strategy FW 2025	**WEAKNESS** W1: Overreliance on individual markets e.g. UK W2: Age demographic W3: Lack of market transparency (financial) in food supply chain W4: Lack of access to broadband and wide variation in levels of innovation and adoption of new technologies W5: Access to credit particularly for young farmers
OPPORTUNITIES O1: Development of Continuous Professional Development Q2: Increasing demand for safe, sustainable, nutritious, authentic, food produced to high standards of environmental protection and animal welfare Q3: Open new markets and expand existing markets O4: Use of new technologies to reduce input costs, increase efficiency and add value O5: Encourage greater producer participation in Producer Organisations	**THREATS** T1: Market volatility, price variations T2: Climate change T2: Rising cost of inputs T4: Labor shortages at both primary and secondary stages of production T5: Changing consumer habits and buying patterns **T6 Loss of reputation from an International and global perspective**

Objective 3 improve the farmers' position in the value chain

STRENGTHS	**WEAKNESSES**
S1: Cooperative structure in the dairy sector S2: Producer Organisations in sheep and horticulture sector S3: Consumer engagement S4: EU initiatives focusing on greater transparency in the food chain and UTP’s S5: Sustainable Quality Assurance Schemes	W1: Fragmented structure at farm and industry level W2: Lack of transparency for value chain W3: Share of value added reducing for primary producer W4: Costs of compliance with EU’s higher environmental and sanitary production standards W5: Lack of accurate data from the value chain
OPPORTUNITIES	**THREATS**
O1: Growing demand for ‘natural’ based food production systems provides opportunities for premiumization by primary producers O2: Introduction of UTP legislation to protect primary producers O3: Development of contractual relationships between farmers and processors. Q4 Advances in animal and crop breeding technologies O5: Increase the number of Producer Organisations Q6: Potential to be a market leader in climate and environmental practices	T1: Market volatility and input costs T2: Costs of compliance with EU’s higher environmental and sanitary production standards plus increasing input costs T3: Price variations T4: Reliance on export markets T5: Loosing family farm image T6: Attracting young people to farming

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

Strengths S1: Grass based production system with low carbon footprint and carbon auditing. S2: High % Utilised Agricultural Area in Ireland is permanent grassland and a significant national cover of hedgerows, individual trees & non-forest woodland. Also, high % of land under agri-environment-climate commitments. S3: Leading innovation and research on climate related support tools and a beef, dairy and sheep breeding program. S4 Well established co-operatives capable of enabling farmer engagement in climate actions and energy. S5: Farm Advisory System which can quickly disseminate new innovations and knowledge transfer.	**Weaknesses** W1: Highest share of GHG emissions comes from agriculture W2: Lack of investment in sustainable energy and incentives to supply energy to the grid W3: Expensive mitigation in expansion of dairy herd. W4: Lack of compensation for those on organic soils W5: Lack of understanding of soils under grassland to sequester carbon W6: Lack of urgency on climate action
Opportunities O1: Broader measures included under the GHG (and ammonia) Marginal Abatement Cost Curve (MACC) Q2: Further roll out of agri-digitisation smart farming Q3. Maximising use of Ag college network and up-skill advisory service and engagement with stakeholders/industry and offering CPD O4: Advance crop and animal breeding Q5: Improve soil and nutrient management Q6: Micro power generation at farm level	**Threats** T1: Low profitability and low average farm size of beef and sheep sectors could reduce the adoption of climate appropriate practices T2: Slowdown in generational renewal could affect uptake of climate appropriate practices T3: Water quality deterioration T4: Risk of "carbon leakage" if production in Ireland declines T5: Capital investment costs and lack of support for Anaerobic Digestors and renewables could be prohibitive to uptake

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

Strengths: S1: Low level of concentration of nitrates in freshwater in Ireland S2: High % of agri environment schemes S3: Low level of soil erosion S4: Low overall stocking density S5: Peatlands cover over 20% of Ireland's area	**Weaknesses** W1: Sub-optimal soil fertility W2: Lack of understanding on the protection of soil and soil science W3: Ongoing drainage of organic soils W4: Increase levels of extreme weather events W5: Lack of research and understanding that results in limited uptake of protected chemical fertilizer
Opportunities O1: Roll-out of the Agricultural Sustainability Support & Advisory Programme Q2: Roll-out of agri digitalisation Q3: Create understanding of environment at fam level O4: Improve slurry management and precision farming Q5: Better peatland and soil management	**Threats** T1: Slowdown in generational renewal could affect uptake of climate appropriate practices T2 Breach of targets set T3: Changing climate conditions T4: Low profitability T5: Inappropriate land-use/soil management

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

Strengths: S1: High percentage of national coverage of hedge rows S2: Build on good knowledge and delivery of environmental schemes eg. GLAS, REPS, EIP's S3: High nature value farming S4: High percentage of extensive grazing in the West of Ireland S5: Peatlands, an important habitat, cover over 20% of Ireland's area S6: The roll out of ASSAP	**Weaknesses** W1: Lack of policy coherence W2: Lack of economic value attributed to public goods W3: Lack of support for on Farm habitats W4: Lack of results based schemes W5: Drainage of peatlands
Opportunities: Q1: Engage industry and the wider community on biodiversity related initiatives O2: Incentivise the provision of ecosystem services including HNV farming through locally led results based schemes O3: Scheme for biodiversity on intensive farms O4: Create species diversity in forestry O5: Foster a greater understanding of environmental issues at farm level	**Threats** T1: Slowdown in generational renewal could affect uptake of environmentally friendly practises T2: Land abandonment T3: Climate change T4: Pollinators species are in decline and there is a risk of loss of species T5: Lack of understanding by public in the understanding of farmers importance in the management of biodiversity

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

STRENGTHS	**WEAKNESSES**
S1: Land Mobility service S2: Training of Young Farmers above EU Average S3: Taxation supports S4: Contribution of Agriculture to Rural Economy through substantial Ag Food Industry with diverse geographical spread S5: Leadership and personal development opportunities provided by Macra na Feirme	W1: Young farmers account for only 6.1% of the total population of farm managers. W2: No Installation aid W3: Access to credit W4: Low income in Agri-sector compared to other sectors of the economy W5: No national broadband plan W6: Contradicting taxation W7. Lack of decentralization of Government Departments and enterprise development
OPPORTUNITIES	**THREATS**
O1: CPD: Continue to increase rates of full and basic training for young farmers. O2: Build on range of supports available for Young Farmers O3: Increase % of funds to Young Farmers O4: Develop career pathways in agriculture O5: Retirement Scheme / Succession plan O6: Rejuvenation pf rural towns and villages	T1: Reduction in existing young farmer supports T2: Decline in young farmer numbers T3: Labor shortage T4: Rising costs and political volatility T5: Disconnect from consumers and market volatility T6: Pension provision and retirement planning

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

STRENGTHS	WEAKNESSES
S1: Substantial sustainable agri-food industry with diverse geographic spread S2: Good quality of life combined with culture and heritage resources S3: Strong tourism sector S4: Strong Community involvement and commitment to engage and deliver locally S5: Rural Youth Organizations promoting inclusion	W1: Low levels of women working in agriculture W2: Poor transport services W3: Lack of fiber broadband infrastructure W4: Number of social groups at risk of social exclusion, isolation and poverty deprivation W5: Lack of funding for Rural Youth Organisations
OPPORTUNITIES	**THREATS**
O1: Increase the number of young farmers and female farmers Building capacities of communities (enabling and supporting rural communities) O2: Increase employment rates, and expand employment options in rural areas O3: Optimising digital connectivity for employment (e.g. remote working) O4: Improve availability of, and access to, necessary services in rural areas O5: Opportunities for diversification through a cooperative model O6: Investment in inclusion and mental health support	T1: Need for generational renewal T2: Rural isolation T3: Impact of Mental Health T4: Climate change T5: Increased compliance and regulatory requirements for Community and Voluntary Sector

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 S1: National plan on antibiotic use S2: High Animal Welfare and Quality Assurance participation S3: Antibiotics usage in Ireland is below the EU average S4: Animal welfare strategy S5: High farm traceability and transparency S6: Low carbon intensity food production systems especially in beef and dairy S7: Commitment and investment in research and innovation eg. EBI development, AHI, BDGP etc	**Weakness** W1: Reliance on imports of certain animal feeds W2: Lack of coherent approach to bio security measures W3: Low level of understanding of AMR development and its transmission by farmers and the public W4: Lack of available systems to monitor usage of antibiotics W5: Lack of market transparency W6: Lack of consumer awareness of the sustainability of EU food production standards
Opportunity O1: Increasing consumer demand for sustainably produced food O2: Young farmer respond to societal demands O2: Increasing consumer demand O3: Increase targeted advisory service on animal health O4: Improvements and developments of vaccines O5: Use of Digital Technology to improve traceability in Food Chain	**Threats** T1: Slowdown in generational renewal T2: New resistant diseases to antibiotics T3: Increased land abandonment T4: Climate change T5: Increase regulation and restrictions/loss of plant protection products T6: Inability to adapt new technologies due to EU restrictions e.g. gene editing, CRISPR technology