Northern Ireland Assembly

Research and Information Service
Briefing Paper

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The ‘Going for Growth’ agri-food strategy – comparison with similar strategies/documents in neighbouring jurisdictions

1 Background

The Agri-food Strategy Board was formally established by the DARD and DETI Ministers in May 2012, in order to meet the Executive’s Programme for Government commitment to develop a strategy for the agri-food sector[1].

The terms of reference establishing the Agri-food Strategy Board identified the Board’s main responsibilities as follows:

- to offer advice on issues relating to the agri-food industry in NI taking account of the views of all elements of the food chain, including primary production, processing, and the food manufacturing industry and reflecting the views of other industry stakeholder organisations;

[1] Programme for Government 2011-15, Northern Ireland Executive, Priority One ,page 35

- to develop the Focus on Food strategy into a long term strategic vision for the agri-food sector;
- to provide advice to Departments/Invest NI on how the Agri-Food Strategy and its strategic outcomes can be achieved and on the resources necessary for delivery;
- to contribute to the development of associated annual operational plans, targets and Key Performance Indicators;
- to reach agreement with a range of stakeholders on their roles in delivery; and
- to help monitor the performance of the sector against targets and identify any necessary remedial action.

Having held a series of meetings and undertaken a public consultation exercise the Agri-food Strategy Board formally launched their strategic action plan, titled '*Going For Growth*' at the 2013 Balmoral Show.

The action plan details 118 recommendations under a number of thematic and sectoral headings.

This briefing paper provides an overview of the main elements within Going for Growth and also compares the report with the following similar reports from neighbouring jurisdictions:

- *Food Harvest 2020* – Ireland(2010)[2];
- *Food for Wales, Food from Wales 2010-2020*(2010)[3];
- *Recipe for Success – Scotland's National Food and Drink Policy (2009)*[4] *and A Forward Strategy for Scottish Agriculture (2001)*[5].

2 Comparison of the differing strategies/reports/action plans

2.1 Context

It should be noted that Wales and Scotland do not currently have a single document which could be characterised as an agri-food strategy, particularly if based upon the template followed by *Going for Growth* and *Food Harvest 2020*.

The policy environment in Wales and Scotland appears to be more segregated than In Ireland and Northern Ireland, with for example the most recently published document in Scotland, *Recipe for Success – Scotland's National Food and Drink Policy (2009)*, making minimal reference to agriculture, choosing rather to focus on food and drink. The last detailed strategy document dealing specifically with agriculture in Scotland

[2] Food Harvest 2020, A vision for Irish agri-food and fisheries (2010)
[3] Food for Wales, Food from Wales - 2010_2020
[4] Recipe for Success – Scotland's National Food and Drink Policy, 2009
[5] A Forward Strategy for Scottish Agriculture,2001

was *A Forward Strategy for Scottish Agriculture: Next Steps*[6] which was published in 2006 and built upon the more detailed, *A Forward Strategy for Scottish Agriculture* which was published in 2001.

Whilst this division is less pronounced in Wales, in that *Food for Wales, Food from Wales* makes numerous references to farming/agriculture, the fact remains that the Welsh Government published a separate *Food, Farming and Countryside*[7] report in 2009.

These factors need to be borne mind when seeking to compare the available strategies from different jurisdictions.

2.2 Summary of key areas of general commonality and difference between Going for Growth and other strategies/reports/action plans from neighbouring jurisdictions.(see appendix 1 for more detail)

Issue	Going for Growth	Other reports/strategies- neighbouring jurisdictions
Approach taken	Thematic and Sectoral	**Food Harvest 2020 –** Thematic and Sectoral **Food for Wales, food from Wales –** Thematic **Recipe for success, Scotland –** Thematic
Scope of report	Very focused on agri food – integrated approach to agriculture and food. Less attention on other issues such as environmental sustainability, health, tourism etc. Unlike other reports has animal by-products and animal feed sectors Notable absence of specific sectors for forestry and bioenergy –although reference is made of both	**Food Harvest 2020** – Similar to Going for Growth as it is agri-food focussed but gives more attention to areas such as environmental sustainability than NI. **Food for Wales, food from Wales –** farming present but not as prominent as Food Harvest 2020 and Going for Growth – no sectoral analysis. Also majors on areas including health, tourism and sustainable development **Recipe for success, Scotland** – food and drink industries – no agriculture references. Focus on 'Scotland of Food and Drink' with additional elements like affordability, public sector procurement and food tourism
Headline targets	60% growth in turnover to £7 billion 15% growth in employment to 115,000	All other reports have no quantifiable targets or lower percentage growth targets in key areas – less ambitious, lower potential growth, or more realistic?

[6] A Forward Strategy for Scottish Agriculture: Next Steps, 2006
[7] Farming, Food & Countryside, Building a secure future, 2009

Issue	Going for Growth	Other reports/strategies- neighbouring jurisdictions
	75% growth in exports (outside NI) to £4.5 billion 60% growth in total added value to £1billion	**Food Harvest 2020 –** primary output value increase of 33%, 40% growth in valued added, 42% growth in exports **Food for Wales, food from Wales –** no quantifiable targets **Recipe for success, Scotland –** refreshed policy in 2010, 25% increase in turnover, 38% increase in exports
Investment required	Clear figure of £1.7 billion (£400 million from govt).	All other reports lack an overall figure or breakdown in terms of source. Recognition of need for investment in all however and **Food Harvest 2020** makes some sectoral costing references e.g. dairy processing expansion cost of €400 million
Number of recommendations	118 (62 Thematic and 56 sectoral)	**Food Harvest 2020** – 215 (97 Thematic and 118 sectoral) **Food for Wales, Food from Wales** – no recommendations – 14 aspirations/directions **Recipe for success, Scotland** – no recommendations but report that informed it had 9 broad recommendations
Clarity of recommendations/actions	Headline recommendations are clear but there is a lack of detail – not surprising given the recognition of the need for Executive approval and the development of an implementation plan.	**Food Harvest 2020** – 215 recommendations are more detailed than Going for Growth but also recognised need for a high level committee to manage detailed implementation. **Food for Wales, Food from Wales –** 14 aspirations/directions are clear but notable lack of detail in terms of achievement **Recipe for Success, Scotland –** next steps are clear but notable lack of detail in how they will be achieved
Calls for rationalisation within industry	Clearly states the need for a collapse of the existing groups representing the industry on a phased basis	Not really touched upon as explicitly within the papers from all of the other jurisdictions – references to co-operation and moves to smaller number of processors (Food Harvest 2020 – milk processors)
Assessment of progress	Intention to do so but lack of clarity in terms of process – should be recognised that action plan was only published in May 2013 and	**Food Harvest 2020** – publication of annual progress reports – 2 to date

Issue	Going for Growth	Other reports/strategies- neighbouring jurisdictions
	has yet to secure formal governmental approval	**Food for Wales, Food from Wales** – annual review utilising strategic indicator monitoring – but hard to determine progress to date **Recipe for Success, Scotland** – progress/success documents published and convening of annual stakeholder conference.

Table 1: Summary of key areas of general commonality and difference between Going for Growth and other strategies/reports/action plans from neighbouring jurisdictions

2.3 Summary of commonalities and selected differences for particular sectors between Going for Growth and other strategies/reports/action plans (see appendix 2 for more detail).

Sector	Commonalities	Differences
Dairy	• Key sector for growth • Innovation and adoption of new technology • New product development • Improving animal health • Research – technology and market needs • Supply chain issues	**Going for growth** • financial incentives to improve milk solids and quality • focus on infant milk formula products • Increased participation in benchmarking • Implement voluntary code of practice on contractual relations **Food Harvest 2020** • Small number of scaled processors • Explore alternative methods to finance growth of sector • national and more flexible Milk Quota Trading scheme prior to 2015 abolition • Use of genomic technologies • Marketing using 'Ireland – food island' concept **Strategic Action Plan for Welsh Dairy Industry**[8] • Encourage the take up of protected food names. • Provision of advice and support on supplying the public sector **Forward Strategy for Scottish Agriculture** • Increased importance of vertical integration within industry
Beef	• Need for coupled or other support – key sector but achieving farmer profit challenging • Export growth • Focus on commercial selection of stock attributes • Quality assurance	**Going for Growth (beef and sheep combined)** • Need to double number of beef and sheep farmers involved in financial and physical performance recording • All island PGI status • Reduction/Eradication of Brucellosis and TB • Land and Buildings improvement scheme **Food Harvest 2020** • Work to be world leaders in genomics

[8] Strategic Action Plan for the Welsh Dairy Industry, 2007

Sector	Commonalities	Differences
	• Better use of research and technology • Supply chain issues – need for better linkages and efficiencies • Enhanced animal health/welfare • PGI status/brand promotion/premiumisation	• Encourage producers to optimise efficiency – compulsory attendance at walks, seminars etc • explore opportunities for profitable use of calves from dairy herd • review beef inspection system – achieve cost effectiveness • extend Bord Bia's strategy of differentiation and premiumisation **Strategic Action Plan for Welsh Red Meat Industry**[9] • encourage new personnel into the Welsh red meat abattoir, processing and butchery sector and support existing personnel • Encourage procurement of Welsh red meat by Local Authorities, colleges, the army, hospitals, event and show organisers, other public sectors, etc. **Forward Strategy for Scottish Agriculture** • no substantive areas of difference
Sheep	• Need for coupled or other support – key sector but achieving farmer profit challenging • Export growth • Focus on commercial selection of stock attributes • Quality assurance • Better use of research and technology • Supply chain issues – need for better linkages and efficiencies • Enhanced animal health/welfare • PGI status/brand promotion/premiumisation	**Going for Growth (beef and sheep combined)** • Need to double number of beef and sheep farmers involved in financial and physical performance recording • All island PGI status • Reduction/Eradication of Brucellosis and TB • Land and Buildings improvement scheme **Food Harvest 2020** • RDP money for fencing and handling facilities to reduce labour costs • adoption of better carcase classification systems • full implementation of the Malone report • extend product range – market local lamb on the domestic market **Strategic Action Plan for Welsh Red Meat Industry**[10] • encourage new personnel into the Welsh red meat abattoir, processing and butchery sector and support existing personnel • Encourage procurement of Welsh red meat by Local Authorities, colleges, the army, hospitals, event and show organisers, other public sectors, etc. **Forward Strategy for Scottish Agriculture** • address the priorities contained in the Andrew Dewar-Durie report
Arable, Fruits and Vegetables	• Research – new crops and how to process • Product innovation • Risks and threats from disease	**Going for Growth** • explore all Ireland growing and processing dimensions • support new orchard planting and replanting in existing orchards • capital funding for specialist buildings

[9] Strategic Action Plan for the Welsh Red Meat Industry, 2009
[10] ibid

<table>
<tr><th>Sector</th><th>Commonalities</th><th>Differences</th></tr>
<tr><td></td><td></td><td>all island Plant Health Policy for 2013
Government must reconsider rating of certain farm buildings
Food Harvest 2020
review funding to maximise uptake of green technology
encourage participation in producer organisations – increase bargaining power
promote health benefits
identify any changes in legislation needed to develop the industry
Strategic Action Plan for Welsh Horticultural Industry[11]
Encourage the procurement of Welsh fresh produce in public sector organisations
increase the use of Welsh grown fresh produce in the tourism and hospitality industry
provide accessible information on both formal and informal education and training opportunities relevant to horticulture available within Wales
Forward Strategy for Scottish Agriculture
engender international confidence in the health of Scottish seeds – export potential
Add value on farm to increase margins</td></tr>
<tr><td>Poultry and Eggs</td><td>Need for further innovation to drive development and efficiency
Support/grant aid</td><td>Going for Growth
Urgent need for a poultry litter treatment solution
proportionate advisory team to service poultry farming development
Government support for the sector to secure growing GB demand
Food Harvest 2020
Implement zoonoses legislation rigorously to ensure consumer confidence
Industry with Enterprise Ireland support to invest in innovation and value added output
continue to promote the poultry and eff quality Assurance Schemes to prevent displacement by imported poultry meat
Wales
Lacks a Poultry or eggs specific action plan
Forward Strategy for Scottish Agriculture
economies of scale – large operations will need to continue to expand
develop niche and specialist markets such as organic to help smaller operators survive</td></tr>
<tr><td>Pigs</td><td>Animal health and welfare
Supply chain issues – need for greater efficiency and potential</td><td>Going for Growth
Government and industry to resources the delivery of the recommendations within the Cogent report</td></tr>
</table>

[11] Strategic Action Plan for the Welsh Horticultural Industry, 2010

Sector	Commonalities	Differences
	remodelling (expansion beyond IPPC thresholds in NI) • Knowledge transfer to increase efficiency and productivity • Benchmarking	• processors must provide incentives to producers who participate in benchmarking • Government and industry must define a pilot scheme to prove the viability of the business models discussed and agreed with the AFSB **Food Harvest 2020** • maintain Aujeszky's disease free status and pursue the overall achievement of 'white list' status on animal disease • industry should urgently investigate alternative waste usage and disposal options from the pig sector • DAFF should lead efforts to obtain market access to additional and new markets – negotiate veterinary conditions for trade • DAFF should review the pigmeat inspection system - cost effective system that complies with regulations and ensures consumer confidence **Strategic Action Plan for Welsh Red Meat Industry[12]** • encourage new personnel into the Welsh red meat abattoir, processing and butchery sector and support existing personnel • Encourage procurement of Welsh red meat by Local Authorities, colleges, the army, hospitals, event and show organisers, other public sectors, etc. **Forward Strategy for Scottish Agriculture** • Identity of Scottish bacon and other pork products needs to be further developed under the '*Specially Selected Scotch'* brand.
Fishing/aquaculture	• Sustainable development • EU funding and quota issues • Research and development • Increased collaboration and engagement –food supply chain • Marine Planning issues	**Going for Growth** • Access must be afforded to sites for the sustainable development of aquaculture • Explore new opportunities for aquaculture in Lough Neagh • Government must recognise aquaculture as an agricultural activity and a legitimate non-consumptive user of water • Increased involvement of fishing representatives in discussions about quotas **Food Harvest 2020** • Share of catch being processed by Irish companies should be increased – adding value. Should also include supply from non-Irish vessels • Skills levels should be increased by focused technical training, mentoring programmes and Graduate Placement programmes • Should be greater integration of seafood sector into the Irish food sector

[12] Strategic Action Plan for the Welsh Red Meat Industry, 2009

Sector	Commonalities	Differences
		• Implementation of a specific Inshore Fisheries Management Framework • Accelerate the implementation of quality and traceability labelling **Wales Fisheries Strategy(2009 implementation plan)**[13] • Establishment of an effective representational structure for the capture fishing industry, sufficiently resourced to contribute through co-management to the sustainable development of the industry • Economic modelling and benchmarking • Establish an effective representational structure for the aquaculture industry • Consolidate Wales internationally as an expert provider of innovative commercial aquaculture technologies and high quality research and training services **Scotland - Marine Scotland's Strategic Plan 2010-2013**[14]. • support and sustain Scottish fisheries-dependent communities • support aquaculture through more efficient, streamlined marine licensing and consent arrangements

Table 2: Summary of commonalities and selected differences for particular sectors between Going for Growth and other strategies/reports/action plans

2.4 Relative strengths and weaknesses of Going for Growth compared to other strategies/reports/action plans.

Issue	Relative Strengths	Relative Weaknesses
Accessibility	Thematic and sectoral approach complement one another and the 118 recommendations are set out clearly and clear identification of who responsible for delivery	Accessibility means that detail is perhaps lacking – recognise need for implementation plan/s Responsibility for delivery could be more detailed – 'industry'
Focus	Clear vision and identification of drivers critical to achieving it. Strong emphasis on the integrated nature of the food and agricultural industries	Could possibly have been wider based upon the content of documents in other jurisdictions – e.g. areas such as food tourism and health
Relevance	Based upon consultation and work of sectoral groups with extensive stakeholder representation	Government representation/involvement in production of report limited to DARD and DETI and also no clear indication of consumer involvement in the process
Targets	Headline targets are specific, measurable and time bound – overall	Are the headline figures achievable/realistic– other reports,

[13] Wales Fisheries Strategy Implementation Plan – Key Priorities 2009
[14] Strategic Plan 2010-2013, Marine Scotland, 2010

	report and individual sectors. Should make measurement of success or failure easier.	notably Wales, have avoided such detail – detailed targets can be motivating but failure to achieve them or overachievement could affect the credibility of the strategy
Job creation	Defined job creation targets – overall and individual sectors	Are the job creation targets achievable/realistic, ambitious/conservative – notable that other reports generally avoid this approach. Does creating 15,000 new jobs and securing 100,000 jobs justify government investment of £400 million?
Investment/costs	Clearly states the required overall investment and where the money needs to come from i.e. government or industry	Questions remain as to how much of the strategy can be delivered without the £400 million from government – is this a deal breaker? Also a lack of detail in terms of sectoral breakdown of the costs/investment required and how industry will draw down £1.3 billion – is this bank investment capital, EU money or other?
Drivers for success	Set out very clearly	Government support for and investment in the strategy is a critical driver. Building upon previous point, what happens if this is limited or doesn't happen at all? Are other strategies/plans as reliant upon government for successful implementation?

Table 3: Relative strengths and weaknesses of Going for Growth compared to other strategies/reports/action plans

3 General comments/observations

- It is clear that agriculture and food are viewed as key industries, particularly in relation to growing the overall economy, within Scotland, Wales, Ireland and Northern Ireland;
- Comparing Going for Growth to agri-food strategies/reports from neighbouring jurisdictions has been difficult as different approaches have been employed. Of those jurisdictions looked at, Ireland's Food Harvest 2020 is the most directly comparable in terms of approach and content;
- Compared to its counterparts, Going for Growth contains ambitious targets for the growth of the agri-food industry here. Only time will tell if these targets are realistic or achievable;
- As things currently stand Going for Growth is still very much a proposed action plan, as the Executive has yet to formally endorse the report or any/all of the recommendations within it. Pending Executive approval, the development of an actual implementation plan/s may reveal more about how the headline targets will actually be achieved.

APPENDIX 1 - COMPARISON OF KEY FEATURES

	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales	Recipe for Success – Scotland's National Food and Drink Policy
Date of publication	May 2013	June 2010	December 2010	June 2009 ('refreshed in 2010)
Period covered	Up to 2020	Up to 2020	Up to 2020	Contains targets up to at least 2017
Nature of document	Action Plan	Strategy document	Strategy document	Policy document
Produced by	Agri-Food Strategy Board – government convened body	Committee convened by and responsible to the Minister for Agriculture Fisheries and Food and made up of industry representatives	Food and Drink Advisory Partnership with input from Ministry for Rural Affairs officials, Welsh Assembly Government, industry and consumers	Directly linked to and inspired by the work of the Scottish Executive convened Food and Drink Leadership Forum and by separate work undertaken under 5 specific work streams as follows: • Sustainable economic growth of the food and drink industry • Healthy and Sustainable food and drink choices • Celebrating and safeguarding Scotland's reputation as a Land of Food and Drink • Walking the talk – getting public sector procurement right • Food security, access and affordability
Approach taken	Thematic and Sectoral	Thematic and Sectoral	Thematic	Thematic
Baseline data	• 27,000 people employed in food and drink processing and 47,000 in farming.	• Contributes gross annual output approaching €24 billion • Directly employs over 150,000 people • Provides the outlet for the	• Snapshot in 2009 showed that gross agricultural output in Wales totalled £1,043 million (excluding store animals). • 23,000 employee jobs in food and drink manufacturing sector	• Food and drink industry is a key sector of Scotland's economy. • It generates over £9.5 billion per year for Scotland and employs over 360,000 people from farmers and fishermen

	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales	Recipe for Success – Scotland's National Food and Drink Policy
	• Overall sector accounts for employment of 100,000 • Current sales generate £4.3 billion.	• produce from Ireland's 128,000 family farms • Represents 60% of manufacturing exports by indigenous firms • Domestically sources 71% of its raw materials	in 2008, accounting for 1.9% of all employee jobs in Wales • Employment in agriculture has been in long term decline – in 1998 a total of 62,000 people were working on holdings in Wales, but by 2009 this had reduced to 56,600	to shop assistants and waiters • Overseas food and drink exports are worth £5 million per year
Vision	Growing a sustainable, profitable and integrated Agri-Food supply chain focused on delivering the needs of the market	Act Smart Think Green Achieve Growth	Not defined succinctly – narrative on how Wales will look in 2020	Wealthier and Fairer Smarter Healthier Safer and Stronger Greener *'Scotland of Food and Drink'*
Scope of strategy/policy	• Agriculture and Food – differing sectors • Fish and aquaculture • Animal By products • Animal feed • Strategic context - Climate change, growing population, CAP and CFP reforms, sustainability issues including water and land quality and public health.	• Agriculture and Food – differing sectors • Seafood • Forestry and Bio-energy • Cereals (2/3 animal feed) • Environmental sustainability - climate change, protecting water resources, protecting biodiversity, air emissions, renewable energy • Wider strategic context – economic challenges, commodity market volatility, CAP reform and CFP reform	• Global context – climate change, growing demand for food, changes in consumption patterns • Agri-food industry – broad overview but not sector specific • Overview of industry – scale and issues/opportunities • Welsh food supply chain • Health and healthy eating • Food culture • Tourism • Sustainable development	• Food and drink industry – no agricultural sector specific references • Overview of importance of food and drink • Tourism and promotion of 'Scotland of Food and Drink' • Health and healthy eating • Sustainable choices • Food availability and affordability • Progress to date • Public sector food procurement • Food security and resilience

	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales	Recipe for Success – Scotland's National Food and Drink Policy
				• Education elements – teaching children food origins
Number of recommendations	118	215	No recommendations – 14 aspirations and directions	No specific recommendations within the report but reference to next steps that need to be taken Food and Drink Leadership Forum report[15], which informed the final policy, had 9 broad recommendations.
Headline targets	• By 2020 turnover will have grown by 60% to £7 billion; • 15% growth in agri-food sector employment to 115,000; • Grow sales outside Northern Ireland by 75% to £4.5 billion; • Grow by 60% to £1 billion the total added value of products and services from local companies.	• Increasing the value of primary output in the agriculture, fisheries and forestry sector by €1.5 billion – 33% increase compared to the 2007-2009 average; • Increasing the valued added in the agri-food, fisheries and wood products sector by €3 billion – increase of 40% compared to 2008; • Achieving export target of €12 billion for the sector – 42% increase compared to the 2007-2009 average.	• No easily quantifiable targets • Focus on 'building connections and capacities' Four key goals as follows: • Sustainability • Resilience • Competitiveness • Profitability	The 2010 'refreshed' policy[16] identifies the following targets: • Increase turnover for the whole industry from £10bn to £12.5bn (25%). • Increase GVA from £4.1bn to £6.1bn (49% increase) – with processing GVA rising from 42% to 50% of turnover and primary production from 38% to 45% of turnover. • Continue to outperform the UK food and drink manufacturing industry, Scottish manufacturing and the Scottish economy, as measured by GVA. • Increase our R&D spend from 0.25% to 0.75%(trebling) of

[15] Development of the National Food and Drink Policy, Leadership Forum Report, 2009
[16] Fresh Thinking, Scotland of Food and Drink, 2010

	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales	Recipe for Success – Scotland's National Food and Drink Policy
				GVA, with the processing sector ultimately meeting UK levels. • Raise productivity to equal UK levels for food processing; and to continue outperforming UK levels for combined food and drink processing. • Increase exports from £3.7bn to £5.1bn (38%), with a strong emphasis on food exports.
Potential jobs created	15,000	A priority for all sectors but only specific figure is an additional 3,000 jobs in the seafood sector	Not specified but recognised as having job creation potential	Not specified but a clear priority and aspiration – language such as 'enhanced employment'
Associated documents	• Fit for Market 2004 - Food Strategy Group • Vision Twenty Twenty – Food Strategy Implementation Partnership, Report of the Foresight Leadership Group, 2006 • Red Meat Strategy 2009 • Focus on Food – A Partnership Strategy for the Food Industry in Northern Ireland, May 2010 • NI Economic Strategy - Priorities for sustainable growth and prosperity	Builds upon the previous Agri Vision 2015 Action Plan published in 2004 Bord Bia Strategic Priorities 2009-11 Food Harvest 2020 is also complemented by the publication of annual progress reports – to date a total of 2 such reports have been published on 2011 and 2012	• One Planet, One Wales, Our Healthy Future • Farming, Food and Countryside - 2009 Also designed to shape new and updated action plans in areas such as local sourcing, food Tourism, Fisheries, Red Meat, Dairy, Horticulture and Organic sectors – these are still a work in progress	• A Forward Strategy for Scottish Agriculture, 2001 • A forward Strategy for Scottish Agriculture: Next Steps • Choosing the right ingredients – the future for food in Scotland, 2008A Forward Strategy for Scottish Agriculture, 2001 • Choosing the right ingredients – the future for food in Scotland, 2008 • Scotland of Food and Drink – successes 2011 • Marine Scotland Strategic Action Plan 2010-13

	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales	Recipe for Success – Scotland's National Food and Drink Policy
	• NI Executive – Programme for Government 2011-2015			• Marine Scotland: Aid to Adapt: A five-point action plan for Scottish white fish and prawn fishing (July 2013
Investment required	• £1.7 billion • (£400 million from government and £1.3 billion from industry)	Recognition and emphasis of the need for investment by government and industry alike but no overall figure provided for either. Some costs cited eg dairy processing expansion cost of €400 million Indications of increases in the scale of investment (ie doubling etc) but no specific figures	Not specified	Not specified
Key Players critical to delivery	• Industry • Government • AFBI • NIEA • Food and Drink Future Skills Action Group (FSAG) • CAFRE • Banks • EU	• Industry • Government • Bord Bia • Teagasc	• Food and Drink Advisory Partnership • Government • Industry	• Scotland Food and Drink • Government • Enterprise Agencies • Industry
Thematic/cross cutting issues	A total of 7 cross cutting themes which have 62 associated recommendations/actions • Growing market share • Working together	A total of 8 cross cutting themes/issues which have associated recommendations/actions • Funding for the sector	• Market development • Food Culture • Sustainability and well being • Supply Chain Efficiency • Integration	A number of cross cutting issues are identified as follows: • Skills • Innovation • Collaboration • Scale

	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales	Recipe for Success – Scotland's National Food and Drink Policy
	• Sustainable Growth • Innovation. entrepreneurship and Skills • Better Regulation • Financing Growth • Food Fortress	• Improving the skills set • Creating new knowledge • Farm level competitiveness and growth • Industry level growth and competitiveness • Environmental sustainability • Customer and Consumer focus • Value added Food and Beverage sector		• Sustainability • Security and Resilience • Availability and Affordability
Key drivers to success	• Changes in behaviour by government, industry and academia to reflect the fact that there is only one supply chain • Government invests £400m over three years in the industry to unlock and leverage investment of over £1.3bn from the industry itself; • Industry works with Government to determine the best model for efficient businesses across all relevant sectors and to develop policy that will facilitate more rapid consolidation	• The development of the smart economy – a foundation Government policy for economic renewal – enabling Ireland to compete and prosper • Wider Investment in ideas, skills and knowledge • Encouragement of innovation and creativity • Recognition of new opportunities for collaboration across the food supply chain • Refining and exploiting the marketing potential	Delivery Plan developed by the Food and Drink Advisory Partnership Also based upon the following drivers under the 4 thematic issues/crosscutting issues **Market Development** • Improved marketing to develop domestic and export markets • Develop stronger Welsh branding • Improving market access and stimulating local and regional markets • Promoting entrepreneurial initiative **Food Culture**	• Create more brands, especially premium brands. Sell more of a wider range of food products overseas. • Add more value to our primary products. • Make more of our Scottish credentials. • Encourage people to collaborate more, especially in the supply chain. • Invest more in the skills we need. • Promote our industry as a good place to work. • Develop the new products consumers want and turn

	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales	Recipe for Success – Scotland's National Food and Drink Policy
	of resources into effective and efficient businesses with the economic scale which permits effective competition at a global level; • There is a reinvigoration of the industry from an increased intake of younger people right across the supply chain, by developing entrepreneurship through the adoption of a more business focused approach and a fostering of artisan creativity that reflects our provenance; and • The many and varied organisations and interest groups representing the industry are collapsed on a phased basis over an agreed timescale to form only four organisations,	from Ireland's 'green' image – making Ireland synonymous with environmentally sustainable and welfare friendly products • Desire for sustainable growth despite the volatility in input prices and world food prices	• Enhance citizen and consumer empowerment through better knowledge • Promote sustainable demand management • Link food culture and marketing **Sustainability and well-being** • Develop ecologically efficient production and supply chains • Reducing the impact of food waste • Investment in R&D for sustainable technologies and waste management **Supply Chain Efficiency** • Supporting entrepreneurship • Skill development through the food supply chain • Investment in food chain R&D and to promote efficient knowledge sharing • Support for innovation and niche product development • Supporting collaborative partnership **Integration** • Making the Food Strategy work across all levels of Government • Contributing to changing in the regulatory frameworks	more of our research into commercial opportunities. • Build more, bigger, globally successful businesses with collaboration as the keystone. • Ensure that more businesses throughout the whole industry become economically and environmentally sustainable.

	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales	Recipe for Success – Scotland's National Food and Drink Policy
			• Employ 'Soft' approaches to change	
Assessment of progress	No indications as to how progress will be assessed, but mention made of development of an implementation plan, and a commitment to assess progress with the Agri Food Strategy Board remaining in place for at least a further 2 years Specific role of the AFSB defined as *'…help monitor the performance of the sector against targets and identify any necessary remedial action'*	Annual progress report – 2 published so far -*Milestones for success.* Harvest 2020 also recommended the creation the *'…establishment of a high-level Implementation Committee, led by DAFF, to oversee and progress its delivery.*	Progress will be assessed on quantitative and qualitative terms against the five key drivers identified in the Strategy – this work will be led by the Food and Drink Advisory Partnership – includes an annual review of the Strategy utilising strategic indicator monitoring- hard to determine what progress has been made to date.	Recipe for Success and the 'refreshed' report contain details on what has already been achieved Refocused Leadership Forum sets SMART targets. Additional commitment to convene an annual conference of interested stakeholders to assess progress Scotland Food and Drink also published progress/success documents in 2011 and 2013

APPENDIX 2 – SECTORAL COMPARISONS

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
Dairy	• Grow turnover by 65% to £1.45 billion • Grow valued added by 65% to £142 million • Grow external sales by 80% to £1.1 billion • Grow employment by 2% to 2,250 full time equivalents • Grow milk solids by 22% to 195,039 tonnes Recommendations – 5 in total: • Provision of financial incentives to improve milk solids and quality • Encourage greater uptake of innovation and product development – particularly infant formula products • Explore opportunities to maintain and improve animal health • Increase participation in benchmarking and publish results • Implement Voluntary Code of Practice on contractual relations	Growth • 50% increase in milk production • Growth in Exports • Growth in Employment • Sustainable returns • Reduced GHG emissions per litre of milk produced Recommendations – 15 in total under 4 headings that are dairy sector specific **Milk Processing** • 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. • The processing sector must ensure that processing capacity meets the expected increased milk supply post quotas. • Given that indicative costings are believed to be in the region of €400m, the	Food for Wales, Food from Wales has no dairy sector recommendations or actions. The Strategic Action Plan for the Welsh Dairy Industry, published in 2007. 3 strategic aims with a total of 44 specific actions 3 strategic aims as follows: • To improve the levels of understanding of market trends and consumer behaviour • To foster innovation and improve supply chain linkages • To improve the business performances of producers and processors in response to changing market conditions, environmental requirements and consumer demands.	4 key areas for action: • the industry will need to consider developing and producing a greater range of value added dairy products, exploiting niche markets; • new technical developments in milking equipment and IT will improve competitiveness; • there is a need for research and development into more efficient production systems; • the increased importance of vertical integration i.e. drive to bring together producer, processor and retailer under singular ownership;

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		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 **Farm Competitiveness** – • 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 • 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 • Producers, with the support of state agencies and AHI, should adopt a		

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
		best-practice approach to animal health to facilitate improvements in the quality of milk being produced. • The Industry should support AHI in its mission to enhance value for livestock farmers and the agri-food industry through superior animal health. • 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. **Technology Transfer** • 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. • DAFF and Teagasc should encourage primary producers to optimise		

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
		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. • 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. **R&D and marketing** • The processing sector, supported by Enterprise Ireland, Teagasc and third level institutions, must develop an investment strategy that will facilitate more commercially focussed R&D. • R&D should be targeted to new product and process development with a greater focus on product areas with added-value potential, such		

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
		as nutraceuticals and functional foods. • 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. • 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.		

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
Beef	Beef and Sheep combined • Grow turnover by 65% to £1.6bn • Grow value-added by 65% to £191m. • Grow external sales by 78% £1.25bn. • Grow employment by 34% to 5,000 full time equivalents Recommendations – 10 in total: • emphasis on commercial/performance attributes, e.g. Estimated Breeding Value in the selection of breeding stock • Red meat processors must review the current pricing matrix to ensure that price differentials are sufficient to incentivise the supply chain to deliver greater conformity to customer requirements • supply chain must seek to deliver greater economies of scale with a particular opportunity to improve communication, technical input and efficiencies through a higher number of larger scale beef finishing units working in partnership with processors	• Increase of 20% in value of output • Enhanced viability across supply chain • Premium product status • Improved market returns • Reduced GHG emissions Recommendations – 22 in total under 5 headings that are beef sector specific **Farm Competitiveness –** • DAFF and the 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. • Collaboration between DAFF and Animal Health Ireland (AHI) should continue, to improve animal health and reduce losses due to animal disease. • An industry group involving Teagasc, ICBF and commercial operators should be established to position the Irish dairy and beef sectors as global	Food for Wales, Food from Wales has no sectoral beef recommendations or actions. The Strategic Action Plan for the Welsh Red Meat (beef, sheep and pigs) industry published in 2009 4 strategic aims with a total of 92 specific actions 4 strategic aims as follows: • To improve the industry's level of understanding of market trends and influence consumer behaviour; • To foster innovation and improve supply chain linkages; • To improve the business performance of processors in response to changing market conditions, environmental requirements, climate change and consumer demands; and • To improve the business performance of primary producers in response to changing market conditions, environmental requirements, climate change and consumer demands.	6 key areas for action: • Scotch Beef is the flagship of the industry and must be protected and treated as such; • support for Quality Meat Scotland as the key body to help Scottish companies develop and increase market share of Scottish beef at home and abroad; • develop Quality Assurance standards, including eating quality standards • stronger links between breeders and finishers so breeders know what is required and when, and are able to respond to the specification of the finisher; • ensure producers have access to consumer information so that they gain a greater understanding of the needs of the final consumer and adjust practices accordingly; • harnessing technology at all levels throughout the beef supply chain to reduce costs, improve market information and ensure traceability, including the adoption of

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	• Industry and Government must develop an action plan to double the number of beef and sheep farms actively engaged in physical and financial performance recording over the next five years; • Support to the red meat sector must be maximised by securing a meaningful level of coupled support in the current CAP review negotiations; • Protected Geographical Indicator status for Beef and Lamb must be explored, possibly on an all-island basis; • The uptake and further development of BovIS as an on-farm management tool within the beef sector must be encouraged and its potential development within the sheep sector should be considered including the mandatory registration of sires; • A new Land & Buildings Improvement Scheme, compatible with Single Farm Payments, must be introduced, to repair/replace or install new field drainage	leaders in the genomics field and to develop communication channels to encourage uptake at farm level. • Stakeholders should make use of the beef quality payment system grid to facilitate a focus on carcase quality and maximise returns for beef producers. • 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. **Technology and Knowledge Transfer –** • DAFF, Teagasc and producers should endeavour to continually		Electronic Identification and Electronic Data Transfer of cattle movement data.

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
	systems or buildings damaged through weather; • Government and industry must work together to support a range of animal health and welfare measures, including an industry action plan to target a 15% reduction in livestock mortality rates by 2020, an agreed strategy to deliver a significant reduction (and ultimate eradication) of bovine TB and achievement of Brucellosis-free status; and • Government and industry must work together to speed up the implementation of the TSE roadmap thereby improving access to new markets particularly third world countries.	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). • 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. • 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. **Production Systems –** • Given that steer and heifer production will continue to be the mainstay of		

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		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. • 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. • 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.		

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		• 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. **Processing –** • 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. • In light of the likely need for significant consolidation in the beef processing sector,		

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		DAFF should engage with the Competition Authority to ensure that the necessary action can be taken within competition rules. • 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. • 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 **Marketing -** • 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. • Given the potential to position Irish grass-fed beef		

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		as a premium product in US markets, developments with regards to market access issues in this market should be continually monitored. • Bord Bia's current strategy of differentiation and premiumisation to extend to 2020. • 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. • 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. • In recognition of the emergence of valuable by-product markets, the		

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		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.		
Sheep	See previous section for combined Beef and Sheep approach	• a growth in output value of 20% by 2020 Recommendations – 12 in total under 3 headings that are sheep sector specific **Farm Competitiveness** – • Sector must improve the uptake of new technology on farms through the greater use of discussion groups and the Teagasc BETTER farms programme for sheep • DAFF should continue to support investment in sheep fencing and handling	See beef section for combined Red Meat Action Plan	6 key areas for action • producers throughout the chain need to understand what consumers want and ensure that they produce to that specification; • address the priorities contained in the Andrew Dewar-Durie report; • Scottish companies, with assistance from Quality Meat Scotland, must identify new markets for good quality lamb; • full traceability of sheep; • the Scottish Executive will work with the UK Government and EU partners to amend

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		facilities to reduce labour costs through the RDP Programme. • DAFF and the sector should strongly support Sheep Ireland, which has been established to develop a new breed improvement programme. • The processing and production sectors must collaborate to improve the focus on quality production through the adoption of more discerning carcase classification systems by means of mechanical grading and transparent price reporting systems. • The relevant State agencies and Teagasc must improve the focus on meat quality through initiatives such as the Bord Bia Lamb Quality Assurance Scheme. • The Committee endorses the findings and the recommendations of the Malone report and calls for their full implementation by all relevant stakeholders. **Processing**		the European Community (EC) Sheepmeat Regime to meet Scotland's interests; • traceability of sheep must be introduced and resistance from Transmissible Spongiform Encephalopathies (TSE) secured.

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		• In order to remain competitive, the Industry should ensure that processing capacity in the sheepmeat sector matches producer output + the sector should extend its product range, including the marketing of 'local' lamb to the domestic market, with support from the relevant State agencies. • 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. • The sector should extend its product range, including the marketing of 'local' lamb to the domestic market, with support from the relevant State agencies **Marketing** • 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		

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		exports of lamb carcasses to more processed cuts • DAFF should support EU initiatives to secure EU promotional funding for generic lamb promotion to promote EU lamb consumption. • DAFF and the relevant State agencies should develop marketing opportunities centred on the positive environmental attributes of sheep farming.		
Arable, Fruits and Vegetables	Grow turnover by 76% to £390m. Grow value-added by 100% to £114m. Grow external sales by 82% to £245m. Grow employment by 44% to 2,900 full time equivalents Recommendations – 8 in total • Government and the sector must undertake research to assess the opportunities to grow and process crops on an all-island basis to achieve the scale necessary to invest in processing capacity; • Government must develop a support scheme to encourage investment in the planting of new orchards and replanting	Horticulture section sector has potential for further development Recommendations – 9 in total under 2 headings that are horticulture sector specific **Restoring Competitiveness** • 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	Food for Wales, Food from Wales has no horticultural sector recommendations or actions. The Strategic Action Plan for the Welsh Horticultural Industry, published in 2010. 4 strategic aims with a total of 41 specific actions. 4 strategic aims as follows: • To improve the levels of understanding of market trends and inform consumer behaviour. • To improve supply chain linkages and foster innovation.	Soft fruits • provide guidance and support in forming producer organisations and in preparing operational programmes so as to benefit from the funding under the new EU fruit and vegetable regime; • fund strategic research and development to support breeding programmes; • encourage and fund a pilot project involving medical and nutritional experts to determine whether increased consumption of berries has a

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
	of existing orchards together with other crops that require high investment but have long delay before viable production is achieved; • Structured and focused capital funding for the construction of specialist buildings, including protected growing structures such as glasshouses and polytunnels, must be put in place, where such activity would result in improved competitiveness and productivity in growers' businesses; • Government must review how research for the arable crops and production horticulture sectors is prioritised and funded; • Government must increase development work with growers to support agronomy training and enterprise benchmarking to encourage efficiency, profitability and business competitiveness; • An all-island Plant Health Policy must be agreed during 2013 and vigorously implemented;	practice at sub-sectoral level. • The industry must continually adapt its production methods both to minimise environmental effects and to benefit from adopting green technologies. • Relevant state agencies should foster product and production innovation, the adoption of emerging technologies and plant breeding. • Processors should invest in specialised plant and equipment to improve labour productivity, working conditions and the quality of output. • 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. • The relevant Departments should review existing programmes and supports	• To improve the business performance of producers and processors in response to changing market conditions, environmental requirements and consumer demands. • To develop and improve agronomic and other technical skills to support horticulture in Wales.	pronounced health advantage; and • help to secure sufficient casual workers under the Seasonal Agricultural Workers Scheme (SAWS) to meet the industry's demand for hand pickers. Potatoes • for long-term sustainability the Scottish seed potato industry needs to breed and maintain a good portfolio of new potato varieties. The funding of strategic research on potato genetics at Scottish Crop Research Institute will be a key element of this; • fewer, but more specialist, seed potato growers are needed, concentrating on producing high-grade stock with fewer generations. SEERAD will seek to maintain Scotland's status as an EU High Grade Seed Potato Area and to provide crop generation information; • globalisation of the seed industry opens up new opportunities for international markets. SEERAD will seek to engender international

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
	• Support must be provided to assist the development of better integrated production and marketing along the arable crops and commercial horticulture supply chains; and • Government must reconsider the rating of certain farm buildings.	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. **Branding and marketing Issues** • 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 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-led market research should explore the opportunities for production of non- traditional fruit and vegetables.		confidence in the health of Scottish seed; • globalisation in ware potato markets has economic repercussions for Scottish growers. They should adhere to British Potato Council advice to grow only under contract. A balance is needed between protection of the health of seed crops and the stripping out of unnecessary costs in ware production; • vigilance is needed in the face of increasing risks from quarantine diseases such as brown rot and ring rot. Scotland's enviable reputation for potato plant health needs to be maintained and where possible improved. Vegetables • Adding value on farm is one way of increasing margins and any developments in this area are to be encouraged. There is a current innovation strategy being run by SAOS for broccoli to add value on the farm through: development of a new broccoli floretting rig; saving

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				in operational costs and overheads in a factory facility carrying out the function of adding value; saving on haulage and handling costs; benefiting vegetable freshness and quality which results in increased consumer satisfaction. This approach could be applied to other types of vegetables
Poultry and Eggs	Grow turnover by 70% to £1.25bn. Grow value-added by 70% to £262m. Grow external sales by 77% to £1.05bn. Grow employment by 23% to 6,700 full time equivalents Recommendations – 4 in total • An urgent solution and interim arrangements must be agreed immediately for the treatment of poultry litter; • Government must inject pace and commitment into the action plan in this area to secure growing demand in Great Britain; • Government must put in place a proportionate advisory team to service	10% increase in the value of poultry output by 2020 Recommendations – 6 in total under 2 headings that are poultry sector specific **Restoring Competitiveness** • The industry should implement zoonoses legislation rigorously in order to ensure ongoing consumer confidence. • 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	Food for Wales, Food from Wales has no poultry and eggs sector recommendations or actions. Unlike other sectors there is also currently no Strategic Action Plan for the Welsh Poultry and Eggs Industry.	3 key areas for action • this is a very competitive industry operating on low profit margins. Economies of scale are vital. To ensure continued profitability the large operations will need to continue to expand; • the smaller operators will face a diminishing share of the market as the multiple retailers expand and take a larger share of the market. As small-scale producers cannot compete on price, niche and specialist markets, such as organic production, will need to be developed and expanded if they are to survive; • Scottish producers must plan ahead so they are in a

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	poultry farming development; and • Government must put in place a dedicated support scheme to assist rapid investment in this sector to ensure an integrated approach with all relevant Departments/Agencies such as DOE and Invest NI	• 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. • Encourage the industry, with the support of Enterprise Ireland, to invest in innovation and value-added output. **Branding and marketing** • Bord Bia should continue to promote the poultry and eggs Quality Assurance Schemes in order to prevent displacement by imported poultry meat. • DAFF should negotiate veterinary conditions for trade with third countries identified by exporters as potential new viable outlets for poultry		position to implement proposals under consideration for new EC legislation to stamp the method of production on egg shells at packing stations, the tightening of welfare standards and changes to cage design and size for laying birds.
Bakery and Snacks	Grow turnover by 29% to £450m. Grow value-added by 28% to £102m. Grow external sales by 35% to £280m. Grow employment by 19% to 1,400 full time equivalents. Recommendations – 4 in total	No specific sector – only reference to bakery in relates to a doubling of industry investment in R&D by 2020 from 0.5% to 1%	Food for Wales, Food from Wales has no bakery and snacks sector recommendations or actions. Unlike other sectors there is also currently no Strategic Action Plan for the Welsh Bakery or Snacks Industry.	Increasing potential for the export of eg good quality bread wheat to the Middle East and North Africa.

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
	• The Bakery and Snacks sector must increase the level of product innovation, including shelf-life, to help deliver greater export opportunities, and process innovation to develop more efficient and co-operative product distribution models, and implement cost reductions; • Government must provide direct funding for innovation with priority given to new projects designed to build export potential, reduce costs, create efficiencies and encourage collaboration; • Skills within the sector, including apprenticeships, must be enhanced by building upon the investment which Invest NI and DEL provide; and • Energy costs must be reduced, with support from organisations including the Carbon Trust			
Drinks and Beverages	Grow turnover by 29% to £450m. Grow value-added by 28% to £102m. Grow external sales by 35% to £280m. Grow employment by 19%	No specific sector – only references to bakery in relate to a doubling of industry investment in R&D by 2020 from 0.5% to 1% and a growth of	Food for Wales, Food from Wales has no drinks sector recommendations or actions.	• Scotland produces first class quality malting barley. This can be developed for home use (whisky and beer industries) and export to

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	to 1,400 full time equivalents. Recommendations – 3 in total • Government must recognise the impact of the largest companies within the sector and ensure its future success by engaging regularly with them to safeguard their position in Northern Ireland and to create opportunities for further growth. This programme must be supported by a business solutions strategy focused on sustainability and capability development; • Government must encourage the creation of three export focused new brands within the medium, small and micro group, and build new support mechanisms that aid the development of the sector in the areas of market intelligence and formal and informal collaboration; and • Alcoholic beverage licensing laws, as they affect alcohol producers, must be reviewed to create a level playing field with Great Britain.	40% in the value added output sector which would include beverages.	The Action Plan for the Welsh Drinks Industry published in 2012. 7 key issues with associated actions as follows: • **Increasing Export Sales of Welsh Drink Products** - Support is needed for businesses in identifying and exploiting potential export trade. • **Planning Issues** - A review of current Welsh Government planning policies to ensure a consistent approach across all Local Authorities in Wales. Industry to highlight any examples in Wales to Government. • **Formal & Informal Collaboration** - Use existing industry organisations as a network for producers, processors and retailers. • **Market knowledge** - Develop an action plan for the Welsh Drinks Industry to disseminate the latest market research, review information, and to identify opportunities for the sector in terms of development • **Quality** - Utilise the existing provision of the Food	Northern Europe, South Africa, South America and China

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			Technology Centres to access advice and consultancy skills • **Marketing and Branding** - Mentoring support for businesses to be developed, assisting them in identifying new market opportunities throughout Wales and the UK, and to allow for the development of products and brands to secure trade with new and existing customers. • **Policy & Legislation** - A cross-departmental working approach is needed between policy, planning, health, substance misuse, and alcohol duty policy officials to address a range of issues	
Pigs	Grow turnover by 48% to £360m. Grow value-added by 19% to £37m. Grow external sales by 57% to £240m. Grow employment by 7% to 1,400 full time equivalents. Grow sow herd by 40% to 53,000 Recommendations – 6 in total • Government and Industry must provide a resource dedicated to deliver the recommendations of the	target of 50% growth in the value of output by 2020 (using the average of the years 2007 to 2009 as a baseline) may be achievable Recommendations – 9 in total under 3 headings that are pigmeat specific **Competitiveness** • The industry must continually adapt its production methods to	Food for Wales, Food from Wales has no pigs sector recommendations or actions. See beef section for combined Red Meat Action Plan that includes pigs	3 key areas for action • high health status should form the basis for future business opportunities; • the identity of "Scottish" bacon and other pork products needs to be further developed under the "Specially Selected Scotch" brand.Scotland's reputation as a producer of quality

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	Cogent Report 'Review of the Northern Ireland Pig Industry'. They should fund an industry representative body to oversee the implementation of the recommendations; • Government and Industry must appoint an independent veterinary expert to provide strategic oversight of the health of the pig herd and to advise on appropriate corrective action; • Processors must provide incentives to producers who participate in benchmarking; • Government and Industry must define a pilot scheme to prove the viability of the business models discussed and agreed with AFSB; The sector must engage an independent advisor to assist in further developing an integrated supply chain model to allow producers the option of entering into such a model; and • Producers intending to expand beyond IPPC thresholds must consider remodelling the supply chain with sow and rearing units on	minimise environmental effects. • 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. • 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 new technologies and best practice. • DAFF should review the pigmeat inspection system, with a view to achieving the most cost-effective system consistent with ensuring		products needs to be extended to pig meat sales; • proposals have now been introduced by the European Commission which will raise the welfare standards for pig husbandry in the rest of Europe to the same level as the UK.

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
	separate sites to facilitate growth while complying with IPPC requirements on environmental and welfare compliance along with improved disease control.	consumer confidence and regulatory compliance. **Branding and marketing** • Industry and producers should extend their participation in the Bord Bia Pigmeat Quality Assurance Scheme. • 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. • 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. **Environmental and welfare issues** • 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		

Sector	Going for Growth	Food Harvest 2020	Food for Wales, Food from Wales and associated sectoral Strategic Action Plans	A Forward Strategy for Scottish Agriculture
		through the Rural Development Programme. • The industry should urgently investigate alternative waste usage and disposal options from the pig sector, such as energy/heat production and anaerobic digesters		
Sea fishing/Aquaculture	Grow turnover by 34% to £90m. Grow value-added by 45% to £22m. Grow external sales by 36% to £75m. Grow employment by 9% to 600 full time equivalents. Recommendations – 9 in total • Government must engage proactively with the relevant UK and EU authorities to address the uncertainty of supply, and there must be increased involvement of fishing representatives in discussions about quotas; • The sector must explore opportunities for increased collaboration and engagement along the supply chain, requiring innovative and original thinking by catchers and processors for mutual sustainability. This	Referenced as Seafood Increase revenue to €1 billion and employment to 14,000 full-time equivalent jobs by 2020 in sea fisheries and aquaculture, a 78% increase in aquaculture volume production. **Supporting Innovation, Restructuring and Added Value** • 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	Food for Wales, Food from Wales has no seafishing/aquaculture sector recommendations or actions. Reference is made to the Wales Fisheries Strategies Wales Fisheries Strategy was published in 2008 and committed the government to undertake 31 actions under the following 4 themes • **Environment** • **Communities and Communication** • **Capacity Building** • **Regulatory Framework** On the 18th June 2013 the Minister for Natural Resources and Food announced plans for an updated Wales Marine and Fisheries Strategy that would focus on the following 3 themes:	No data – purely an agricultural strategy Marine Scotland's *Strategic Plan 2010-2013* does detail actions for fishing and aquaculture as follows: **Fishing** • ensure sea fisheries are managed sustainably, and promote value-added activity, to achieve maximum sustainable economic returns to Scotland; • support and sustain Scottish fisheries-dependent communities; • manage the use of marine space, ensuring an appropriate balance between the interests of fisheries and other marine industries/uses and the marine environment **Aquaculture**

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	may include co-operation along the supply chain and between key players (industry and Government) to secure and service large-scale market opportunities; • Access must be facilitated to sites, and opportunities fostered for the sustainable development of aquaculture both off shore and along the Northern Ireland coastline, e.g. by providing access to seed and grow mussels and oysters, and to maximise the opportunities presented by the harvesting of seaweed; • New opportunities should be explored to harness the resource of Lough Neagh for alternative aquaculture species; • Potential sources of EU funding must be identified which could be used to support the catching, processing and aquaculture sectors; • Government funding must be made available to aquaculture projects and catchers should be represented at trade shows,	immediate priorities, consistent with available resources. • 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. • The development of innovative, consumer oriented seafood products should be supported by BIM Seafood Development Centre and Teagasc Ashtown Food Research Centre. • The R&D programmes on marine biotechnology development and marine functional foods underway by the Marine Institute should be continued and intensified. **Competitiveness** • While recognising the place of specialist processors serving niche markets,	• Better evidence and understanding • Sustainable, local, shared management • Increased profitability The Minister intends to publish a new Strategic Action Plan for Fishing and Aquaculture in November 2013.	• need to ensure that the needs and interests of this industry sector are considered and integrated alongside others in planning and managing (where possible on a complementary basis) use of marine space. • The sector should benefit from increased clarity on planned use of marine space; and from more efficient, streamlined marine licensing and consent arrangements. • continue to work with aquaculture industry and other partners towards an aquaculture industry in Scotland that is sustainable, ambitious, thriving, competitive, profitable, diverse and growing - providing sustainable benefits for the people of Scotland, including in fragile coastal and islands communities Marine Scotland also recently published its *Aid to Adapt: A five-point action plan for Scottish white fish and prawn fishing* (July 2013) which has the following 5 areas for action: • Hardship fund

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	where appropriate, to help convey the clean, green, healthy nature of the local product; • The value-added of seafood here must be increased by providing dedicated access to specialist seafood R&D services, including the DARD-funded research programme at AFBI; • Government must recognise aquaculture as a legitimate, non-consumptive user of water. The NIEA must take a leading role in improving the quality of inland and coastal waters to support the production of the highest quality shellfish and in supporting fisheries and the sustainable development of aquaculture; and • Aquaculture must be recognised as an agricultural rather than an industrial activity, in line with planning appeals decisions. This is particularly important given the intention to develop a new planning policy document for the coast	restructuring and enhanced co-operation within the production, sales, marketing and processing areas should be supported by specific programmes. • 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. **Marketing** • There should be a greater integration of the seafood sector into the Irish food sector and treatment of it as such. • 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.		• Business flexibility • Voluntary discard-free prawn fishing • Reducing discards across the prawn fleet • Maximising economic growth through seafood

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		• 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 **Catching Sector management** • 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. • 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. **Aquaculture management** • The relevant Departments and state agencies should resolve current difficulties		

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		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. • 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 **Environmental Issues** • 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. • The Irish seafood sector, with DAFF, BIM and MI, should promote the development of long-term management plans for fish		

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		stocks having regard to the need for environmental and social sustainability. • 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.		
Animal By-Products	Grow turnover by 29% to £29m. Grow value-added by 73% to £14.2m Recommendations – 4 in total • Any biomass solution for poultry litter must incorporate meat and bone meal as an additional fuel source, thus enabling Northern Ireland to capture a greater share of the value added generated in the manufacture of this material for fuel; • The proposed single marketing organisation must	No specific sector – no references to animal by-products	Food for Wales, Food from Wales has no Animal by-products sector recommendations or actions. Unlike other sectors there is also currently no Strategic Action Plan for the Welsh Animal by-products Industry.	No specific sector – no references to animal by-products

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	include indigenous businesses seeking to develop export markets for human or pet food in its remit; • Invest NI must ensure that businesses involved in maximising the value of animal material, either through investment in further processing, new products or by accessing new export countries, must be supported in fast-tracking opportunities; and • Government must ensure the UK competition authorities adopt a supportive approach to any restructuring of the rendering industry where species/category specialisation will enable greater value to be captured for the Northern Ireland economy			
Animal Feeds	Grow turnover by 54% to £1.0bn. Grow employment by 30% to 650 full time equivalents. Recommendations – 3 in total • Feed companies must invest in developing products and staff to help support farmers	Referenced as Cereals in Food Harvest 2020 Optimising yields, tackling high costs and targeting higher priced domestic markets will be necessary to reverse the declining production trends. Retention of an indigenous malting	Food for Wales, Food from Wales has no Animal Feeds sector recommendations or actions. Unlike other sectors there is also currently no Strategic Action Plan for the Welsh Animal Feed Industry.	Referenced as Cereals • improved market prospects with the possibility to apply for capital grants under the marketing and processing scheme of the Rural Development Plan. This could develop exports and oilseed crushing;

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	in maximising the value and performance of their livestock; • Government must support further R&D in the areas of nutrition for improvements in performance and health, both of animals and humans and for environmental sustainability; and • The recommendations of the Independent Food Advisory Group Report must be fully implemented, most notably the recommendation that the feed trade produces a world class assurance system	barley industry is also important for the sector. Recommendations – 13 in total under 2 headings **Restoring Competitiveness** • Growers should place a greater emphasis on diversification in the tillage crops grown, with greater consideration given to beans, peas, oilseeds, biomass crops etc. to increase overall returns per hectare. • 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. • 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		• produce in response to market demand – growing the right varieties and accurate harvest sampling and analysis to offer quality products to specific markets; • increase co-operation at all levels with producer machinery/labour rings and marketing co-operation by traders to cut costs and increase market opportunities; • Scottish Quality Cereals assurance scheme should be exploited more for market purposes and the membership benefits illustrated to farmers; • develop a national supply and demand analysis via Home Grown Cereals Authority. Explore potential for growing alternate crops for animal feed, energy, etc; • increased use of IT would assist by improving reporting, administration and market information; • encourage the wheat contract relationships with main processors which are increasing. This gives secure

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		the CAP post-2013 deliberations. • 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. • 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, pig or poultry producers. • Industry needs to urgently prepare for the impact of the new EU pesticide regulations to ensure the sustainability of crop production in Ireland. • Teagasc should continue to undertake research into low input, more efficient and more environmentally friendly production systems		marketing with control over pricing decision

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		and ensure that relevant research is applied at farm level. • DAFF in conjunction with relevant agencies should examine the feasibility of Ireland becoming a source of basic or semi-basic seed for Europe. • 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. • Research should be undertaken into high value areas such as biopharmaceuticals, bioplastics and bioremediation. **Branding and marketing Issues**		

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		• The focus of the Irish Grain Assurance Scheme should further highlight its benefits, in terms of its guarantee of quality and safety. • Price risk management, including forward selling, is a necessity in a globalised market and industry must further develop these instruments. • 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		
Organic production	No specific sector or reference to organic production with the exception of an organic salmon industry representative	An increase in organic land use to 5% from the current level of just over 1% (Programme for Government commitment) Recommendations – 4 in total under 1 heading • DAFF should continue to directly support the sector through the Organic Farming Scheme and the Schemes of Grant Aid for	Food for Wales, Food from Wales has no organic sector recommendations or actions. In 2009 Organic Centre Wales launched their 'Better Organic Business Links' (BOBL) project to the value of £2.2m. The Supply Chain Efficiencies scheme is part of the Rural Development Plan for Wales 2007 – 2013. Over a three year period the project aims to develop new, emerging and existing markets for organic produce whilst driving innovation	The Scottish organics sector must: • identify and tailor production to consumer demand and market outlets; • develop the supply chain so that organic producers are matched by sufficient processing capacity; • in the livestock sector, identify finishers to whom store producers can sell their produce;

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		the Development of the Organic Sector. • Bord Bia should continue to build consumer awareness of the availability of Irish organic produce through National Organic Week campaigns and the National Organic Awards. • Bord Bia should develop export markets and enhance the profile of the Irish organic produce by attending major European food fairs such as Biofach. • Teagasc should continue to carry out sector specific research, innovation and product development.	all along the supply chain from producer to consumer.	• ensure the right business and technical advice is available on how to convert to and, as importantly, maintain organic farming in Scottish conditions; and • ensure that Scottish farmers are able to use organic standards which avoid gold plating and reflect Scottish conditions
Forestry & Bio-Energy Crops	No specific sector but action plan does makes reference to expansion in forestry in less favourable land providing a valuable and sustainable source of biomass and increase biodiversity.	No overarching target but sector viewed as critical in helping the govt achieve carbon reduction targets as well as opening up anew income stream for farmers Recommendations – 15 in total under 3 headings **Restoring Competitiveness** • DAFF and Industry should further explore measures to bring about a significant	Food for Wales, Food from Wales has no forestry or bio-energy sector recommendations or actions.	

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		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. • Industry should promote producer groups in order to reduce management costs and increase the marketability of timber from private forests. • DAFF should continue to support the provision of the forest road network, while also evaluating new infrastructure systems. • Industry and representative organisations should support operator training and education. • Teagasc and the relevant third-level institutions should ensure relevant and		

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		up-to-date training to meet new developments. DAFF should continue to support the growing bioenergy sector through the Bioenergy Scheme, co-funded by the EU under the Rural Development Programme. • Supply chain mechanisms should be developed to ensure biomass crops are brought to market and full market returns realised. • 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. • DAFF should lead an intensive marketing campaign on the benefits of farm forestry, including supplying the bioenergy market to attract new entrants. **Environmental issues** • DAFF and the relevant State agencies should continue to research the		

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		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. • DAFF and the relevant State agencies should consider the development of a national certification standard for sustainable forestry management. • The Industry should plant more broadleaf varieties to improve biodiversity and leisure benefits. **Research and Development** • The timber processing industry should invest in R&D and innovation to assist product development and forestry management. • Teagasc should continue to research the potential of crops to provide energy and develop efficient production, harvesting and storage methods. • DAFF, via the COFORD research programme, should continue to support		

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		sustainable and competitive forestry practices and policies that contribute to building and maintaining a knowledge economy and scientific research in a vibrant forestry sector		