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The Going for Growth strategic action plan – how much is ‘new’?

1 Background

The Agri-food Strategy Board formally launched their strategic action plan, titled ‘Going For Growth’ at the 2013 Balmoral Show.

The 118 recommendations that make up the Going for Growth action plan, are presented on a thematic (7 themes with 62 recommendations) and sectoral basis (10 sectors with 56 recommendations).

In seeking to determine how many of the 118 recommendations were ‘new’, the researcher drew upon reference materials that are within the public domain, with the following list comprising the documents that were looked at.

- Fit for Market, 2004¹;
- Seafish Business study of NI Sea Fish industry 1983(updated in 1990)²;
- Vision Twenty Twenty, 2006³;
- Red Meat Industry Taskforce report 2007;
- NIRDP 2007-13 programme website/documentation⁴;
- DARD Evidence and Innovation Strategy 2009-13⁵;
- Focus on Food, 2010⁶;
- Value of Food & Drink Industry to Northern Ireland 2010 – NIFDA⁷;
- Dairy Competitiveness Study, 2010;
- Review of the Northern Ireland Pig Industry (Cogent report), 2011;
- NI Executive Programme for Government 2011-2015⁸;
- NI Executive Economic Strategy - Priorities for sustainable growth and prosperity 2012⁹;
- Appetite for Growth 2012– NIFDA¹⁰;
- DARD Strategic Plan 2012-20¹¹;
- Agriculture and Forestry Greenhouse Gas Reduction Strategy and Action Plan, DARD;
- Review and Strategic Priorities for the Development of the Horticulture Industry in Northern Ireland, July 2012¹²;
- Future Skills Action Plan for Food and Drink Manufacturing and Processing (2012)¹³;
- Our Passion, Our Place, NIEA Strategic Priorities 2012 – 2022¹⁴;
- Economic Advisory Group – Review of Access to Finance for NI Businesses, March 2013¹⁵
- NIRDP 2014-20 – Consultation document¹⁶;

Whilst this list is extensive the researcher does not make the assumption that this list is comprehensive.

¹ [Fit for Market, The Report of the Food Strategy Group, July 2004](#)

² [A Business Study of the Northern Ireland Sea Fish Industry, Seafish, 1983 \(updated 1990\)](#)

³ [Vision twenty twenty, Food Strategy Implementation Partnership, Report of the Foresight Leadership Group, 2006](#)

⁴ [Northern Ireland Rural Development Programme 2007-13, DARD website, 12th September 2013](#)

⁵ [Evidence & Innovation Strategy 2009-13, DARD](#)

⁶ [Focus on Food, A Partnership Strategy for the Food Industry in Northern Ireland, Industry Advisory Panel, May 2010](#)

⁷ [Value of Food & Drink Industry to Northern Ireland, Northern Ireland Food and Drink Association, October 2010](#)

⁸ [Programme for Government 2011-15, NI Executive](#)

⁹ [Economic Strategy Priorities for sustainable growth and prosperity, NI Executive, 2012](#)

¹⁰ [Appetite for Growth, Opportunities for growth in the Northern Ireland food and drink industry by 2020, Northern Ireland Food and Drink Association, March 2012](#)

¹¹ [Strategic Plan 2012-2020, DARD](#)

¹² [Review and Strategic Priorities for the Development of the Horticulture Industry in Northern Ireland, Horticulture Forum for Northern Ireland, July 2012](#)

¹³ [Future Skills Action Plan for Food and Drink Manufacturing and Processing, DEL,](#)

¹⁴ [Our Passion, Our Place, NIEA Strategic Priorities 2012 -2022, DOE, 2012](#)

¹⁵ [Economic Advisory Group – Review of Access to Finance for NI Businesses, March 2013](#)

¹⁶ [Consultation on the Rural Development Programme 2014-20, DARD](#)

2 Analysis

The core objective for the commissioning of this briefing paper was to definitively determine how many of the 118 targets within *Going for Growth* are 'new'.

It should be stated that this objective has not been achieved, largely due to the fact that the origins of many of the issues and associated recommendations within *Going for Growth* have been impossible to determine.

This issue has been accentuated by the lack of a detailed/definitive reference section within *Going for Growth*, meaning that the researcher has had to identify documents that relate to the themes and agricultural sectors covered within *Going for Growth*.

It needs to be recognised, particularly in relation to the *Going for Growth* recommendations, that assessing whether an individual recommendation is new or carried over from an earlier report is highly subjective and can come often down to semantic differences.

With these caveats in mind the data presented in sections 2.1, 2.2 and 2.3 provides an indication rather than a comprehensive assessment of the origins of the information provided within *Going for Growth*.

2.1 Headline targets

Looking at the overall headline targets for the agri-food industry set out in *Going for Growth* (see appendix 1) it is evident that **with the exception of the creation of 15,000 jobs referred to in *Value of Food and Drink Industry to Northern Ireland (2010)* and *Appetite for growth (2012)*, none of the other headline targets appear in any of the following reports** that could be loosely termed 'agri-food foundation reports' and which all preceded *Going for Growth*

- Fit for Market, 2004
- Vision twenty/twenty, 2006;
- Focus on food, 2010;
- Value of Food and Drink Industry to Northern Ireland, 2010; and
- Appetite for growth, 2012.

2.2 Themes

An analysis of the major themes within *Going for Growth* compared to the other so called 'agri-food foundation reports' (see appendix 2) reveals a number of common themes as follows:

- Innovation;
- Understanding and developing the market for products.
- Finance/funding

- Supply chain management/development
- Collaboration/working together
- Capability/skills development

The consistent appearance of these themes in reports dating from as early as 2004 (Fit for Market) highlights the fact that many of the challenges and opportunities facing the agri-food industry in Northern Ireland have been well known for a considerable time.

2.3 Recommendations

The 118 recommendations contained within *Going for Growth* are split on a thematic (62) and sectoral (56) basis.

As stated previously, given the lack of references within *Going for Growth* the researcher was unable to identify the origin of all of the report's 118 recommendations. With this constraint in mind, the researcher has sought to classify the recommendations (see appendix 3) through the following headings:

- New/Possibly new as no references could be found; and
- Partially new;

It should also be stated that recommendations which were assessed as not meeting either of these 2 classifications, were consequently deemed to have been carried over from other reports/strategies/action plans, or were recommendations which required more clarification before an assessment could be made as to their newness or otherwise.

On this basis the researcher classified 73 recommendations, equating to 62% of the overall 118 recommendations, as either being carried over (69 recommendations in total) or requiring clarification (4 recommendations in total - nos 15, 17, 25 and 79) before assessment.

2.3.1 'New/Possibly new recommendations'

Table 1 below details those recommendations identified as being 'New/Possibly new as no references could be found'

Theme/Sector	No	Recommendation	Comments
Skills	36	Industry will establish an action group to reassess on-farm training needs (in conjunction with FSAG) and develop a holistic action plan for skills development in the farming and fishing industries.	Possibly new as no references could be found
	37	Industry will provide ICT skills development and infrastructure on farms to support the implementation of revised business models.	Possibly new but builds upon work of the 2007-13 NIRD and potential Farm Family Skills Scheme and Innovation and Technology Evaluation and

Theme/Sector	No	Recommendation	Comments
			Demonstration scheme within the 2013-20 NIRDP
Better Regulation	40	A Code of Practice must be developed for implementation of regulations that impact industry.	Possibly new as no references could be found
	44	Government departments must benchmark their application of legislation and standards internationally to identify best practice in cost effective regulation.	Possibly new – Gold-plating issue is widely debated but international comparison/benchmarking innovative dimension
	45	The NIEA must develop an advisory arm similar to the successful model developed and implemented by The Health and Safety Executive (Northern Ireland) which encourages compliance by a partnership approach rather than by prosecution	Possibly new as no references could be found
	46	Information required for regulation and control must be gathered using agreed protocols and be as efficient as possible.	Possibly new as no references could be found - Need for more info
Financial Growth	47	Government must identify £250m over three years to fund financial and advisory development support for a new Farm Business Improvement Scheme. The objectives of the scheme would be to improve competitiveness and productivity in primary production, through increased efficiency, up skilling on-farm, farm modernisation and a commitment to working with supply chain partners to improve performance and profitability. The support would be tiered to reflect the degree of engagement in business planning, physical and financial performance management, utilisation of performance recorded breeding stock, business improvement activities and so on	Possibly New – but builds upon previous NIRDP training and Farm Modernisation Programme options. Tiered support dimension is interesting proposal
	49	Government must put in place a facility to provide “security of last resort” to meet the Bank security requirement for those partners in a sector scheme who are seeking to invest as part of their commitment to their supply chain partners.	Possibly new - Need for more clarity as to what this means Economic Advisory Group – Review of Access to Finance for NI Businesses Appetite for Growth: <ul style="list-style-type: none"> Introduce borrowing guarantee scheme
	52	Government must create a specific expert resource with an objective of securing 0.5% share of the innovation funding programme.	Possibly new – need more information on source of funding – previous references to EU innovation funding

Theme/Sector	No	Recommendation	Comments
Ford Fortress	58	The animal feed sector must implement the recommendations of the Food Fortress feed materials assurance scheme currently under development at the Institute for Global Food Security. Processors must make the new quality standard a requirement of their supply chain.	Possibly New – but already in development by the Institute for Global food Security
	61	The Institute for Global Food Security must be commissioned to review the Northern Ireland supply chain and identify further risks and opportunities for collaborative improvement in food assurance.	New review but issues/challenges with the supply chain have been well established in many of reports/strategies/action plans referenced previously
	62	Research must be commissioned immediately to determine more cost effective application of advanced science based testing and thereby to ensure this does not become a barrier to rapid adoption and implementation.	Possibly new - Need for more information as to what this means – relate to animal or plant disease or both?
Beef and Sheep	70	A new Land & Buildings Improvement Scheme, compatible with Single Farm Payments, must be introduced, to repair/replace or install new field drainage systems or buildings damaged through weather.	Possibly new as no references could be found
Poultry and Eggs	80	Government must put in place a proportionate advisory team to service poultry farming development;	Possibly new - Need for more information as to what this means in practice
	81	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	Possibly new as no references could be found
Drinks and Beverages	82	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	Possibly new - Need for more information as to what this means in practice – what about support for smaller companies?
	83	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.	Possibly new - Need for more information as to what this means in practice

Theme/Sector	No	Recommendation	Comments
Bakery and Snacks	85	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.	Possibly new as no references could be found
	86	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.	Possibly new as no references could be found
	87	Skills within the Bakery and Snacks sector, including apprenticeships, must be enhanced by building upon the investment which Invest NI and DEL provide.	Possibly new as no references could be found
	88	Energy costs must be reduced, with support from organisations including the Carbon Trust.	Possibly new as no references could be found
Pig	92	Government and Industry should define a pilot scheme to prove the viability of the business models discussed and agreed with AFSB.	Possibly new as no references could be found– what models have been discussed and agreed by the AFSB?
Fish and Aquaculture	104	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 may include co-operation along the supply chain and between key players (industry and Government) to secure and service large-scale market opportunities.	Possibly new as no specific references could be found
	106	New opportunities should be explored to harness the resource of Lough Neagh for alternative species.	Possibly new as no references could be found
	108	Government funding must be made available to aquaculture projects and catchers should be represented at trade shows, where appropriate, to help convey the clean, green, healthy nature of the local product.	Possibly new - Need for more information as to what this means in practice Need for further information – Government will co-finance the EMFF – is funding mentioned here in addition to EMFF? – if so this would be new.
	111	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	Possibly new – but issue has been a cause for debate prior to EU commitment to develop Marine and WFD legislation

Theme/Sector	No	Recommendation	Comments
Animal By Products	113	The proposed single marketing organisation must include indigenous businesses seeking to develop export markets for human or pet food in its remit.	Possibly new as no references could be found
	114	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.	Possibly new as no references could be found
	115	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.	Possibly new as no references could be found
Animal Feeds	116	Feed companies must invest in developing products and staff to help support farmers in maximising the value and performance of their livestock.	Possibly new as no references could be found

Table 1: Recommendations identified as being 'New/Possibly new as no references could be found'

Looking at the information in table 1 a total of 30 recommendations are classified as 'New/Possibly new', equating to 25% of the 118 overall recommendations within the report.

In terms of a breakdown per theme/sector, Table 2 below highlights how many recommendations there are per theme/sector in total and how many are 'New/Possibly new'.

Theme/Sector	Total number of recommendations	How many of the recommendations are 'New/Possibly new'	% 'New/Possibly new'
Market Share	6	0	0
Working Together	11	0	0
Sustainable Growth	10	0	0
Innovation	3	0	0
Skills	7	2	29
Better Regulation	9	4	44
Financial Growth	11	3	27
Food Fortress	5	3	60
Beef and Sheep	10	1	10
Dairy	5	0	0
Poultry and Eggs	4	2	50
Drinks and Beverages	3	2	67

Bakery and Snacks	4	4	100
Pig	6	1	17
Arable Crops, Fruit and Vegetables	8	0	0
Fish and Aquaculture	9	4	44
Animal By-Products	4	3	75
Animal Feeds	3	1	33
Total	118	30	-

Table 2: 'New/possibly new' recommendations broken down by theme and sector

Looking at the data in table 2 there does appear to be a tendency for recommendations identified as 'New/Possibly new' to be more likely found under sectoral, rather than thematic headings:

- **Total thematic recommendations** = 62, 12 of which, equating to 19% are classified 'New/Possibly new'.
- **Total sectoral recommendations** = 56, 18 of which, equating to 32% are classified 'New/Possibly new'.

2.3.2 'Partially new' recommendations

Table 3 below details those recommendations identified as being 'Partially new'.

Theme/Sector	No	Recommendation	Comments
Working Together	10	Industry will work with Government to consolidate responsibility for key industry issues such as R&D, skills, marketing, and innovation in order to simplify contacts across the Agri-Food industry.	Partially new - Common issue across many reports but consolidated responsibility appears to be an innovation
	12	Industry will work with Government to develop optimum business models for each sector and form commercial scale pilot programme in order to prove the model before roll out across the individual sectors.	Partially new Red Meat Strategy Review Dairy Competitiveness Study Review of the Northern Ireland Pig Industry (Cogent report), 2011 Commercial scale pilots more innovative?
Innovation	28	There must be a doubling of drawdown of European funding in support for Agri-Food innovation over the next three years (2014-2016).	Partially new NI Economic Strategy: <ul style="list-style-type: none"> • Outlines supporting businesses and academia to apply for national and EU funding DARD Evidence and Innovation Strategy 2009-13: <ul style="list-style-type: none"> • Explore mechanisms for signposting agri-food

			<p>and rural enterprises to the opportunities presented by Invest NI innovation support schemes, EU funding programmes and schemes such as the Defra LINK programme</p> <p>Doubling of EU funding drawdown for agri-food appears to be a new target</p>
Skills	33	There should be a significant increase in training places in Agri-Food at all levels. Industry will commit to provide placements for all industry trainees including farm apprenticeships/farm management development opportunities for those currently being trained in CAFRE, as an integral part of their development.	<p>Partially new</p> <p>DEL/DARD</p> <ul style="list-style-type: none"> • Future Skills Action Plan for Food and Drink Manufacturing and Processing - Theme 1 – skills provision – but doesn't deal specifically with a significant increase in training places or commitment to provide placements to all
Beef and Sheep	66	Industry and Government should 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.	Partially new – benchmarking exists but doubling target is new
	68	Protected Geographical Indicator status for Beef and Lamb should be explored possibly on an all-island basis.	Partially New – previous applications made for NI Beef and NI Lamb
	71	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.	Partially new – TB and Brucellosis actions ongoing but 15% decrease in livestock mortality rates appears to be new
Dairy	74	Government and industry must encourage greater uptake of innovation and product development by processors, in particular develop infant formula products/ingredients.	Partially new – innovation and product development has been a key element of many preceding reports but emphasis on infant formula is new
	75	Government and industry must explore opportunities to extend the ICBF/AHWNI model to encourage industry participation in improving and maintaining animal health.	Partially new – ICBF/AHWNI model already exists

	77	Industry must implement the Voluntary Code of Practice on contractual relations.	Partially new – Code of practice exists implementation across the industry is additional
Pig	89	Government and the sector must provide a resource dedicated to deliver the recommendations of the Cogent Report 'Review of the Northern Ireland Pig Industry'. They should fund an industry representative body to oversee the implementation of the recommendations.	Partially new – need for further clarification - Cogent report in existence and Ulster Pork and Bacon Forum exists – would proposed representative body replace the existing forum and would it received money directly from government t or in the form of levy?
	93	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.	Partially new Review of the Northern Ireland Pig Industry (Cogent report: <ul style="list-style-type: none"> • Development of an integrated chain requires the establishment of a Value Chain Management Team led by a senior level representative from each of the companies/stakeholders along the chain
Arable Crops, Fruits and Vegetables	100	An all-island Plant Health Policy must be agreed during 2013 and vigorously implemented.	Partially new A work in progress – recent all island action plan to address Chalara Fraxinea – July 2013
Fish and Aquaculture	109	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	Partially new AFBI already provides significant support to seafood sectors as evidenced through the AFBI annual reports. Dedicated access to the DARD funded research programme may be a new development as the DARD funded research programme is agreed on an annual basis.
Animal Feeds	118	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.	Partially new - Independent Food Advisory Group Report already in existence but full implementation is additional

Table 3: Recommendations identified as being 'Partially new'

Looking at the information in table 3 a total of 15 recommendations are classified as 'Partially new', equating to 13% of the 118 overall recommendations within the report.

In terms of a breakdown per theme/sector, Table 4 below highlights how many recommendations there are per theme/sector in total and how many are 'Partially new'.

Theme/Sector	Total number of recommendations	How many of the recommendations are 'Partially new'	% 'Partially new'
Market Share	6	0	0
Working Together	11	2	18
Sustainable Growth	10	0	0
Innovation	3	1	33
Skills	7	1	14
Better Regulation	9	0	0
Financial Growth	11	0	0
Food Fortress	5	0	0
Beef and Sheep	10	3	30
Dairy	5	3	60
Poultry and Eggs	4	0	0
Drinks and Beverages	3	0	0
Bakery and Snacks	4	0	0
Pig	6	2	33
Arable Crops, Fruit and Vegetables	8	1	12.5
Fish and Aquaculture	9	1	11
Animal By-Products	4	0	0
Animal Feeds	3	1	33
Total	118	15	-

Table 4: 'Partially new' recommendations broken down by theme and sector

Looking at the data in table 4, and in line with what was found previously regarding 'New/Possibly new' recommendations, there does appear to be a tendency for recommendations identified as 'Partially new' to be more likely found under sectoral, rather than thematic headings:

- **Total thematic recommendations** = 62, 4 of which, equating to 6% are classified 'Partially new'.
- **Total sectoral recommendations** = 56, 11 of which, equating to 20% are classified 'New/Possibly new'.

2.3.3 'New/Possibly new' and 'Partially new' recommendations combined

Combining the 'New/Possibly new' and 'Partially new' classified recommendations accounts for 45 (38%) of Going for Growth's 118 overall recommendations.

Combining the 'New/Possibly new' and 'Partially new' classified recommendations on a thematic and sectoral basis revealed the following:

- **Total thematic recommendations** = 62, 16 of which, equating to 26% are classified 'New/Possibly new' or 'Partially new'.

- **Total sectoral recommendations** = 56, 29 of which, equating to 52% are classified 'New/Possibly new' or 'Partially new'.

The trend for a greater proportion of recommendations identified as 'New/Possibly new' or 'Partially new' to be found under sectoral, rather than thematic headings, as exhibited in sections 2.3.1, 2.3.2 and 2.3.3 may be due to a number of factors including:

- Many of the thematic issues can be traced back to at least as far as 2004's *Fit for the Future* report and as such there is a lesser likelihood for thematic recommendations to be 'New/Possibly new' or 'Partially new'.
- The specialised nature of many of the sectors, and the apparent lack of any previous work/representative bodies in areas such as Bakery and Snacks and Animal By-products by way of example, means there is a greater likelihood for recommendations to be 'New/Possibly new' or 'Partially new'.
- Due to the specialised nature of these sectoral areas it has been harder to find related reports/strategies/action plans and as a result information may have been missed, making it appear that more of these recommendations are 'New/Possibly new' or 'Partially new'.

3 Conclusions and observations

- Given the previously mentioned caveats, the quoted data within this paper should not be taken as a definitive assessment of how many of *Going for Growth's* 118 recommendations are new. This paper is rather an informed, yet somewhat subjective and indicative assessment of the recommendations, completed without access to all of the documentation that informed the work of the Agri-Food Strategy Board.
- The *Going for Growth* report could be characterised as evolutionary, rather than revolutionary, given the fact that based upon the researcher's assessment, the majority of the recommendations (68%) appear to have been carried over from previously published reports/strategies/action plans. This is perhaps not that surprising given the complex nature of the challenges/opportunities identified within *Going for Growth*, many of which can be traced back to at least 2004 (*Fit for Market*).
- Based upon the researcher's caveated assessment, there are elements of *Going for Growth*, such as all but one of the headline targets, and 32% of the recommendations, which appear to be either entirely new or which add a new dimension to a recommendation/issue/action from a previously published report/strategy/action plan.
- In many ways the issue of whether the recommendations are 'new' or carried over from a previous report is relatively unimportant. Rather, the key will be if or how the 118 recommendations are actually implemented.

APPENDIX 1 – HEADLINE TARGETS – GOING FOR GROWTH AND RELATED DOCUMENTS

	Going for Growth	Fit for Market (2004)	Vision twenty/twenty (2006)	Focus on Food (2010)	Value of Food & Drink Industry to Northern Ireland (2010)	Appetite for Growth (2012)
Headline targets	<ul style="list-style-type: none"> 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 	<p>No headline targets but recognition of need for a target driven strategy and emphasis on the following means by which to measure success</p> <ul style="list-style-type: none"> Sales outside Northern Ireland, with a special emphasis on sales off the Island of Ireland should be the key impact indicator In addition gross value added, return on capital employed and new jobs generated should be tracked closely as a means of gauging the extent to which the sector is contributing to the overall development of 	<p>No headline targets – rather statements setting out a vision of how Northern Ireland will look in 2020 covering themes such as</p> <ul style="list-style-type: none"> Diet, lifestyle and health Advances in knowledge and technology 	<p>Key indicators for growth are identified</p> <ul style="list-style-type: none"> Return on Capital Employed (ROCE). Productivity Gross Value Added (2008 prices) per Full Time Employee Gross Value Added per £1000 of Capital Employed External Sales as a Percentage of Total Turnover <p>Headline targets only fixed for year 2011 as follows:</p> <ul style="list-style-type: none"> Return on Capital Employed (ROCE) - 8% - same as 2008, 2009 and 2010 actual performance 	<p>No Headline targets – focus on the potential of the agri-food industry</p> <ul style="list-style-type: none"> Highlights how a 40% growth in turnover could create up to 7,680 new direct jobs and a further 7,500 indirect and induced jobs in the wider economy target of 40% growth in turnover has the potential to generate an additional £600m in export earnings for the local economy 	<p>No Headline targets – focus on the potential of the agri-food industry</p> <ul style="list-style-type: none"> Industry potential to create 15,000 new direct and indirect jobs by 2020 Potential for a 40% growth in turnover to £5.2 billion Potential to generate an additional £600m per year in new exports, particularly to the GB market

		the Northern Ireland economy		<ul style="list-style-type: none"> • External Sales as a Percentage of Total Gross Turnover (%) – 74.4% up from 72.6% in 2010 • Productivity, GVA per £1,000 of total capital employed – 504 – same as 2008, 2009 and 2010 • Productivity, GVA per full-time employee equivalent (£) in 2008 prices - £29,719 – up from £ 29,538 in 2010 		
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APPENDIX 2 – THEMES/AREAS FOR ACTION – GOING FOR GROWTH AND RELATED DOCUMENTS

	Going for Growth	Fit for Market (2004)	Vision twenty/twenty (2006)	Focus on Food (2010)	Appetite for Growth (2012)
Themes/ areas for action	<p>7 cross cutting themes</p> <ul style="list-style-type: none"> • Growing market share • Working together • Sustainable Growth • Innovation. entrepreneurship and Skills • Better Regulation • Financing Growth • Food Fortress 	<p>4 broad areas where industry and government have a role to play in developing the sector:</p> <ul style="list-style-type: none"> • Market understanding and penetration • Fostering Innovation • Supply Chain Management and Development • Capability Development 	<p>Foresight Leadership group proposed actions under the following 4 themes:</p> <ul style="list-style-type: none"> • Collaboration and Transfer of Skills and Technology • Consumer Confidence • Cultural Change • Funding and support 	<p>5 strategic priorities:</p> <ul style="list-style-type: none"> • Market understanding and development • Fostering Innovation • Supply chain management • Capability development • Energy and waste 	<p>Way forward identified a number of themes with associated actions – responsibility split across industry and government</p> <p>Industry:</p> <ul style="list-style-type: none"> • Increase productivity in both the primary and secondary sectors • Look for opportunities for rationalisation, including mergers and acquisitions • Invest in and improve sales and marketing/branding • Increase levels of R&D and innovation <p>Government</p> <ul style="list-style-type: none"> • Invest in infrastructure • Create supportive regulatory environment • Continue support for marketing • Development of skills • Support investment in the industry • Address local market failure on funding • Secure power and implement lower rate of

					Corporation Tax in Northern Ireland
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APPENDIX 3 – ASSESSMENT/CLASSIFICATION OF ALL 118 RECOMMENDATIONS WITHIN GOING FOR GROWTH

Theme/Sector	No	Recommendations	Previous references/New/Comments
Market Share	1	Establish a single Agri-Food Marketing Organisation for Northern Ireland to consolidate all marketing and promotional activities for the industry with a clear food promotion strategy. This organisation must explore opportunities to work with Bord Bia and Scotland Food and Drink in areas of mutual interest and where joint programmes would enable access to EU funding stream.	Fit for Market: <ul style="list-style-type: none"> Domestic marketing being un-coordinated and Suggested need for a dingle food industry development organisation.
	2	Government must provide additional resource to advise and negotiate on market entry and build relationships with new markets e.g. through Ministerial visits to key markets, at least two each year.	Fit for Market: <ul style="list-style-type: none"> Marketing support challenge fund suggestion – excluded capital funding but included feasibility studies Small team of market development professionals put in place to provide support for NI companies giving SMEs wishing to grow a presence in key markets
	3	Help fund the significant cost of market intelligence and statistics especially in consumer food markets.	Fit for Market: <ul style="list-style-type: none"> Suggested active programme for developing market intelligence
	4	Government must remove barriers to export such as charges for Export Health Certificates (EHCs) and explore the potential to achieve separate certification for Northern Ireland animal health status and identify areas where collaboration with authorities in the Republic of Ireland can hasten market entry.	Appetite for Growth: <ul style="list-style-type: none"> Need for a supportive regulatory environment – role for government
	5	Government must strengthen our brand perception through eradication of animal disease, such as TB, Brucellosis; deliver swiftly on an all-island plant health framework, and extend current industry-led approach on BVD to Johne's and other production diseases	DARD Strategic Plan 2012-20 <ul style="list-style-type: none"> Achieve objectives envisaged in all island Animal Health and Welfare strategy
	6	Government must improve the marketing/branding of the local seafood product, particularly through the highlighting of key unique selling points, including provenance, and the	Seafish Business study of NI Sea Fish industry 1983 (updated in 1990) <ul style="list-style-type: none"> Need for better and more effective marketing Focus on Food:

Theme/Sector	No	Recommendations	Previous references/New/Comments
		acceleration of voluntary labelling and certification of fish products with appropriate support.	<ul style="list-style-type: none"> Fish sector study
Working Together	7	Industry will work with Government to determine the best model for efficient production in relevant sectors and in developing policy that will facilitate more rapid consolidation of resources into effective and efficient operating units.	<p>Fit for Market:</p> <ul style="list-style-type: none"> Trends towards fewer and larger farms – industry response to lack of profitability <p>Appetite for Growth:</p> <ul style="list-style-type: none"> Greater rationalisation of farm units into more efficient units Efficiency of the food supply chain <p>Red Meat Strategy Review:</p> <ul style="list-style-type: none"> Need for efficient production models <p>DARD Evidence and Innovation Strategy 2009-13</p> <ul style="list-style-type: none"> Efficient production a key research need <p>Dairy Competitiveness Study:</p> <ul style="list-style-type: none"> Improve economies of scale in primary production and processing to achieve lower unit costs and contribute to competitiveness
	8	Industry will work with Government to overcome the barriers to shared land use through rental or con-acre posed by the interpretation and application of the tax regime (including Inheritance Tax), and Single Farm Payment. Longer-term lease of land must be facilitated to encourage tenant investment in improving the effective use of land, our most valuable resource.	<p>DARD consultation</p> <p>CAP Reform process and consultation – dual claims issue</p>
	9	Industry will work with Government to provide support mechanisms for a rapid move to competitive scale within processing.	<p>Fit for Market:</p> <ul style="list-style-type: none"> Processing sector faces particular challenges including achieving scale and efficiency at processing level <p>Appetite for Growth:</p> <ul style="list-style-type: none"> Agri food needs greater economies of scale – industry should explore
	10	Industry will work with Government to consolidate responsibility for key industry issues such as R&D, skills, marketing, and	Partially new - Common issue across many reports but consolidated responsibility appears to be an innovation

Theme/Sector	No	Recommendations	Previous references/New/Comments
		innovation in order to simplify contacts across the Agri-Food industry.	
	11	Industry will work with Government to capture key statistics for the total supply chain, including use of agency labour and details of the animal feed and rendering sectors.	Appetite for Growth: <ul style="list-style-type: none"> Lack of separate analysis of animal feed sector in DARD statistics
	12	Industry will work with Government to develop optimum business models for each sector and form commercial scale pilot programme in order to prove the model before roll out across the individual sectors.	Partially new Red Meat Strategy Review Dairy Competitiveness Study Review of the Northern Ireland Pig Industry (Cogent report), 2011 Commercial scale pilots more innovative?
	13	Industry will work with Government to develop supportive policies for skills, research and effective regulation.	DARD Strategic Plan 2012-2020: <ul style="list-style-type: none"> Goal 1 – deliver targeted strategy for R&D, knowledge exchange and support for innovation – industry collaboration in research DARD Evidence and Innovation Strategy 2009-13 <ul style="list-style-type: none"> Financial support from government a necessity
	14	Industry must develop innovative customer-focused sectoral supply chain solutions, covering all links within the chain. Participation in such initiatives should be included in the key criteria to qualify for enhanced levels of funding support including the Farm Business Improvement Scheme.	Fit for Market <ul style="list-style-type: none"> an agri-food industry which is first and foremost market led and focused on delivering customer solutions fostering innovation Farm Business Improvement scheme New scheme but builds upon the Farm Modernisation Programme (FMP) in the NIRDP 2007-13 – FMP did not have enhanced funding criteria. New NIRDP 2014-20 Priority 2 – Business Investment Scheme
	15	Industry must adopt more formal relationships, with clarity of purpose a recognise feature and in which the benefits of	Need for more clarity as to what this means

Theme/Sector	No	Recommendations	Previous references/New/Comments
		delivering exceptional customer experience through efficient sustainable production are shared across the chain.	Customer focus, sustainable production, formal relationships all feature to some extent in all reports looked at
	16	Industry must identify and promote our unique selling points, including pasture based rearing, improved animal health, welfare and biosecurity, etc.	Fit for Market: <ul style="list-style-type: none"> • Recognition of need to develop a supportive image – feeling of lack of lack of connotations + or – for NI produce Appetite for Growth: <ul style="list-style-type: none"> • Local beef uniqueness referred to
	17	Industry must develop distribution hubs for transporting produce to market and should consider development of co-operative centres for the intake of raw materials.	Need for more clarity as to what this means – particularly elements dealing with co-operative centres Fit for Market: <ul style="list-style-type: none"> • Highlights transport costs in NI – similar to ROI but higher than GB • Need for integration and enhancement to improve time to market • Raw material supply issues raised Focus on Food: <ul style="list-style-type: none"> • Need for better supply chain management – co-operation and collaboration needed to make sectors such as transport more efficient Appetite for Growth <ul style="list-style-type: none"> • Need for an improved road network to reduce transport costs NI Economic Strategy: <ul style="list-style-type: none"> • Priority areas for investment – Networks – which includes roads
Sustainable Growth	18	AFBI/DARD/Northern Ireland Environment Agency and industry must develop an economically viable model for sustainable production, delivering on improved on-farm profitability from more efficient use of resources.	Red Meat Strategy Review: <ul style="list-style-type: none"> • Funding and research towards developing commercially viable production Dairy Competitiveness Study <ul style="list-style-type: none"> • Need to reduce costs base

Theme/Sector	No	Recommendations	Previous references/New/Comments
			DARD Evidence and Innovation Strategy 2009-13 – central theme
	19	Government must ensure a robust scientific base for the measurement of greenhouse gas emissions to promote Northern Ireland as a low carbon location for food production within Europe	<p>Appetite for Growth:</p> <ul style="list-style-type: none"> • Work to establish the actual carbon footprint of grass based beef • Opportunities to reduce the environmental footprint of the agri-food industry <p>DARD Evidence and Innovation Strategy 2009-13:</p> <ul style="list-style-type: none"> • Need to understand and improve the environmental footprint of the agri-food industries <p>DARD Strategic Plan 2012-20:</p> <ul style="list-style-type: none"> • Implement the Agriculture and Forestry Greenhouse Gas Reduction Strategy and Action Plan
	20	Government must commission research into measureable, best practice systems for sustainable intensification on-farm, building upon previous work to underpin and promote sustainability as a cornerstone of the Northern Ireland Plc brand and learn from Bord Bia experience with the Origin Green brand	DARD Evidence and Innovation Strategy 2009-13
	21	<p>Research centres must develop the capability to:</p> <ul style="list-style-type: none"> • translate genetic improvements in ruminant livestock to the Northern Ireland grass based system; •to assist industry in translating the research for monogastric improvements into practical, deliverable outcomes; •support development of healthy eating alternatives to processed food ingredients; •support the R&D necessary to deliver improved human health through developments in animal nutrition. 	<p>AFBI work ongoing in many of these areas</p> <p>Appetite for Growth:</p> <ul style="list-style-type: none"> • Reference to genetic selection/optimisation
	22	Government must develop a strategic regional land management policy to determine the most productive use of our limited land. This should identify areas best suited for specific agricultural use whilst maintaining and enhancing environmental sustainability	DOE committed to delivering a Strategic Planning Policy Statement (SPPS) as part of the wider Planning Reform process

Theme/Sector	No	Recommendations	Previous references/New/Comments
	23	New Agri-Environment Schemes must be aligned with the sustainability agenda for agriculture, including the promotion of increased woodland, and promote biodiversity within our production systems as part of our overall brand image. This should incorporate clearer recognition that, in some instances, producers are being rewarded for the production of public goods as well as food	NIRDP 2013-20 consultation document: <ul style="list-style-type: none"> Woodland expansion, enhanced biodiversity and wider sustainability agenda are all identified
	24	Government must accelerate extension of the gas network into the West of Northern Ireland to reduce our carbon footprint and cost base and identify ways of improving security of supply in the wider market place	NI Economic Strategy: <ul style="list-style-type: none"> Exploring prospects for the further expansion of the natural gas network
	25	Government must review incentives for renewable energy and ensure policies are complementary to the Agri-Food industry rather than in competition with it	Need for more clarity as to what this means – particularly with regards to competition DARD Evidence and Innovation Strategy 2009-13: <ul style="list-style-type: none"> numerous references to renewable energy and development of the same Dairy Competitiveness Study: <ul style="list-style-type: none"> Reference to evaluation of opportunities for alternative and renewable energy sources
	26	Government must fast track a solution for poultry waste into energy, recognising the environmental benefits and remove a key uncertainty over the growth of the Agri-Food industry in Northern Ireland.	Already a key priority for DARD Appetite for Growth: <ul style="list-style-type: none"> Identifies issue as a potential limiting factor for development of the poultry industry
	27	The Agri-Food industry must grasp the opportunities that healthy eating offers and work with public health nutritionists, policy makers and the local research base for healthier, moderate portion size products that respond to consumers' demands for healthy eating.	NI Obesity Prevention Framework 2012-22: <ul style="list-style-type: none"> 'Fitter future for All' Includes recommended steps for food manufacturers
Innovation	28	There must be a doubling of drawdown of European funding in support for Agri-Food innovation over the next three years (2014-2016).	Partially new NI Economic Strategy:

Theme/Sector	No	Recommendations	Previous references/New/Comments
			<ul style="list-style-type: none"> Outlines supporting businesses and academia to apply for national and EU funding <p>DARD Evidence and Innovation Strategy 2009-13:</p> <ul style="list-style-type: none"> Explore mechanisms for signposting agri-food and rural enterprises to the opportunities presented by Invest NI innovation support schemes, EU funding programmes and schemes such as the Defra LINK programme <p>Doubling of EU funding drawdown for agri-food appears to be a new target</p>
	29	All Agri-Food innovation funding must be under the control of one dedicated executive and board which must work closely with Matrix to ensure consistent policy across the industry. This organisation would align strategic industry priorities with R&D provision within the local innovation infrastructure.	Invest NI: <ul style="list-style-type: none"> NI Agri-Food Competence Research Centre
	30	Bureaucracy must be reduced to enable the industry to get ahead of its competition in pursuing new opportunities. Government must work to convert this belief into a reality and as a first step open the Agri-Food Competence Centre for business without delay	DARD Strategic Plan 2012-20: <ul style="list-style-type: none"> Minimising bureaucracy Invest NI: <ul style="list-style-type: none"> NI Agri-Food Competence Research Centre
Skills	31	All Agri-Food skills and entrepreneurship development must be the responsibility of a single dedicated group which must match provision to requirements.	DEL/DARD <ul style="list-style-type: none"> Future Skills Action Plan for Food and Drink Manufacturing and Processing - Theme 3 - coordination
	32	Introduce a programme to introduce food, into the education curriculum at pre-school, primary and secondary level to enhance the understanding of agriculture and food and examine the scope for development of primary and secondary level curriculum based training in Agriculture and Food to GCSE exam level.	DEL/DARD <ul style="list-style-type: none"> Future Skills Action Plan for Food and Drink Manufacturing and Processing - Theme 2 – sector attractiveness
	33	There should be a significant increase in training places in Agri-Food at all levels. Industry will commit to provide placements for all industry trainees including farm apprenticeships/farm management development opportunities for those currently	Partially new DEL/DARD

Theme/Sector	No	Recommendations	Previous references/New/Comments
		being trained in CAFRE, as an integral part of their development.	<ul style="list-style-type: none"> Future Skills Action Plan for Food and Drink Manufacturing and Processing - Theme 1 – skills provision – but doesn't deal specifically with a significant increase in training places or commitment to provide placements to all
	34	Industry will commit to provide training to career staff on Agri-Food training opportunities.	DEL/DARD <ul style="list-style-type: none"> Future Skills Action Plan for Food and Drink Manufacturing and Processing - Theme 2 – sector attractiveness
	35	Industry will resource and expedite implementation of the Food and Drink Future Skills Action Group (FSAG) Action Plan.	DEL/DARD Future Skills Action Plan for Food and Drink Manufacturing and Processing
	36	Industry will establish an action group to reassess on-farm training needs (in conjunction with FSAG) and develop a holistic action plan for skills development in the farming and fishing industries.	Possibly new as no references could be found
	37	Industry will provide ICT skills development and infrastructure on farms to support the implementation of revised business models.	Possibly new but builds upon work of the 2007-13 NIRDP and potential Farm Family Skills Scheme and Innovation and Technology Evaluation and Demonstration scheme within the 2013-20 NIRDP
Better Regulation	38	Regulators and Industry must engage in order to develop an agreed regulatory environment which adds value, is proportionate, informed and has a risk-based approach to regulation.	NI Economic Strategy: <ul style="list-style-type: none"> Improve regulatory environment to ensure it is efficient and pro-business DARD Strategic Olan 2012-20: <ul style="list-style-type: none"> Promote principles of better regulation and simplification Appetite for Growth <ul style="list-style-type: none"> More supportive regulatory environment – less risk averse
	39	Greater weight should be applied to Agri-Food applications reflecting the industry's strategic importance.	Fit for Market <ul style="list-style-type: none"> Need for more supportive planning policy – new on farm business ventures

Theme/Sector	No	Recommendations	Previous references/New/Comments
			<p>Appetite for Growth:</p> <ul style="list-style-type: none"> • Planning and environment – poultry litter issue <p>NI Economic Strategy:</p> <ul style="list-style-type: none"> • Make operational changes to streamline planning
	40	A Code of Practice must be developed for implementation of regulations that impact industry.	Possibly new as no references could be found
	41	Industry must speak as one representative body in discussions with regulators.	Builds on rationalisation/co-ordination comments found in many of the already referenced reports/strategies/action plans
	42	Government must work with the industry in practical and proportionate regulation to ensure consumer value rather than cost to the industry	Theme common to many of the already referenced reports/strategies/action plans
	43	Government must revise current planning and IPPC application procedures and priorities to ensure the speed of successful processing of Agri-Food applications is equal to, or better than those in Great Britain. This revision should also put strict limits on the time taken by other Northern Ireland Departments which are consultees to the process	<p>Fit for Market:</p> <ul style="list-style-type: none"> • Reference to challenge for processing industry in particular <p>NI Economic Strategy:</p> <ul style="list-style-type: none"> • Planning system reform commitment
	44	Government departments must benchmark their application of legislation and standards internationally to identify best practice in cost effective regulation.	Possibly new – Gold-plated issue is widely debated but international comparison/benchmarking innovative dimension
	45	The NIEA must develop an advisory arm similar to the successful model developed and implemented by The Health and Safety Executive (Northern Ireland) which encourages compliance by a partnership approach rather than by prosecution	Possibly new as no references could be found
	46	Information required for regulation and control must be gathered using agreed protocols and be as efficient as possible.	Possibly new as no references could be found - Need for more information
Financial Growth	47	Government must identify £250m over three years to fund financial and advisory development support for a new Farm Business Improvement Scheme. The objectives of the scheme would be to improve competitiveness and productivity in primary production, through increased efficiency, up skilling on-farm,	Possibly New – but builds upon previous NIRD training and Farm Modernisation Programme options. Tiered support dimension is interesting proposal

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		farm modernisation and a commitment to working with supply chain partners to improve performance and profitability. The support would be tiered to reflect the degree of engagement in business planning, physical and financial performance management, utilisation of performance recorded breeding stock, business improvement activities and so on	
	48	Government must review and identify the key factors within the regulations governing Single Farm Payment, inheritance, income tax, land tenure and conacre that prevent more effective use of agricultural land.	SFP issues well established and are a key area of focus for the current CAP reform process and forthcoming DARD consultation process
	49	Government must put in place a facility to provide “security of last resort” to meet the Bank security requirement for those partners in a sector scheme who are seeking to invest as part of their commitment to their supply chain partners.	Possibly new - Need for more information as to what this means Economic Advisory Group – Review of Access to Finance for NI Businesses Appetite for Growth: <ul style="list-style-type: none"> • Introduce borrowing guarantee scheme
	50	Government must expand the scope and funding and simplify the Agri-Food Processing and Marketing Grant (PMG) and the European Fisheries Fund (EFF) Programmes to maximise uptake within EU rules. Rates should be on a par with other UK regions and the Republic of Ireland. Locally set criteria should be reviewed with Industry	Builds on ongoing CFP reform, new EMFF and new NIRD 2013-20 Priority 3
	51	Government must retain the Selective Financial Assistance Scheme to support investments in large businesses outside the scope of the PMG Scheme.	Scheme already exists
	52	Government must create a specific expert resource with an objective of securing 0.5% share of the innovation funding programme.	Possibly new – need more information on source of funding – previous references to EU innovation funding?
	53	Government must engage with “Capital for Enterprise” (CfEL) and participating Northern Ireland banks to promote the Enterprise Finance Guarantee scheme to the Agri-Food industry and encourage greater uptake. A “Sources of Finance”, including European sources, reference guide should be compiled and promoted to Northern Ireland businesses	Economic Advisory Group – Review of Access to Finance for NI Businesses: <ul style="list-style-type: none"> • Identified the lack of information on comprehensive sources of finance

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	54	Government must agree with the UK Government on devolving the power to vary Corporation Tax in a timely and affordable manner.	NI Executive Programme for Government 2011-2015 NI Economic Strategy
	55	Government must commission a review of the impact of current lack of tax relief available for agricultural building allowances and develop a case for the introduction of 300% capital allowances for capital investment in the Agri-Food industry. This review should consider the potential of achieving this by designating all of Northern Ireland as an Enterprise Zone for tax purposes and expanding the relief available within the Zone to include first year allowances on expenditure incurred in relation to agriculture buildings.	Appetite for Growth: <ul style="list-style-type: none"> Industrial de rating a vital benefit NI as an enterprise zone proposed by previous NI Secretary of State Owen Paterson
	56	Government must examine the bureaucracy surrounding access to funding, identify best practice in the UK or Europe and bring forward proposals to simplify the process.	Economic Advisory Group – Review of Access to Finance for NI Businesses: <ul style="list-style-type: none"> Recommendation 6 - simplification
	57	Government must put in place an Agri-Food Fund to support rapid investment in the industry.	Fit for Market: <ul style="list-style-type: none"> Government should establish fund to co-finance establishment of supply chain management initiatives – marketing challenge fund Appetite for Growth: <ul style="list-style-type: none"> Measures to address local market failure on funding
Ford Fortress	58	The animal feed sector must implement the recommendations of the Food Fortress feed materials assurance scheme currently under development at the Institute for Global Food Security. Processors must make the new quality standard a requirement of their supply chain.	Possibly New – but already in development by the Institute for Global food Security
	59	Electronic tagging must be introduced as quickly as possible and Government and industry databases extended to include advanced testing data which may include genome and DNA records.	DARD Strategic Plan 2012-20: <ul style="list-style-type: none"> Enhanced traceability system to support trade and disease control – including electronic tagging

Theme/Sector	No	Recommendations	Previous references/New/Comments
	60	Government must provide financial support to accelerate R&D and collaborative uptake initiatives making Northern Ireland a world leader in safe food production.	DARD Evidence and Innovation Strategy 2009-13? <ul style="list-style-type: none"> Food safety R&D mention – and government funding for the same
	61	The Institute for Global Food Security must be commissioned to review the Northern Ireland supply chain and identify further risks and opportunities for collaborative improvement in food assurance.	New review but issues/challenges with the supply chain have been well established in many of reports/strategies/action plans referenced previously
	62	Research must be commissioned immediately to determine more cost effective application of advanced science based testing and thereby to ensure this does not become a barrier to rapid adoption and implementation.	Possibly new - Need for more information as to what this means – relate to animal or plant disease or both?
Beef and Sheep	63	Producers must be encouraged to place more emphasis on commercial/performance attributes, e.g. Estimated Breeding Value in the selection of breeding stock.	A key element of many previous reports such as Red Meat Strategy Review
	64	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.	A key element of many previous reports such as the Red Meat Strategy Review
	65	The 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.	A key element of many previous reports such as the Red Meat Strategy Review
	66	Industry and Government should 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.	Partially new – benchmarking exists but doubling target is new
	67	Support to the red meat sector must be maximised by securing a meaningful level of coupled support in the current CAP review negotiations.	Have been previous calls for this action and debate continues as to whether this would actually assist the industry – forthcoming CAP consultation is likely to include this issue
	68	Protected Geographical Indicator status for Beef and Lamb should be explored possibly on an all-island basis.	Partially New – previous applications made for NI Beef and NI Lamb

Theme/Sector	No	Recommendations	Previous references/New/Comments
	69	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	Partially new - BovIS system in existence
	70	A new Land & Buildings Improvement Scheme, compatible with Single Farm Payments, must be introduced, to repair/replace or install new field drainage systems or buildings damaged through weather.	Possibly new as no references could be found
	71	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.	Partially new – TB and Brucellosis actions ongoing but 15% decrease in livestock mortality rates appears to be new
	72	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.	TSE roadmap in place
Dairy	73	Industry must provide clear financial incentives for improvement in milk solids and milk quality.	A key element of many previous reports such as the Milk Competitiveness Study.
	74	Government and industry must encourage greater uptake of innovation and product development by processors, in particular develop infant formula products/ingredients.	Partially new – innovation and product development has been a key element of many preceding reports but emphasis on infant formula is new
	75	Government and industry must explore opportunities to extend the ICBF/AHWNI model to encourage industry participation in improving and maintaining animal health.	Partially new – ICBF/AHWNI model already exists
	76	Government and industry must increase participation in benchmarking and widely publicise the results.	A key element of many previous reports such as the Milk Competitiveness Study.
	77	Industry must implement the Voluntary Code of Practice on contractual relations.	Partially new – Code of practice exists implementation across the industry is additional
Poultry and Eggs	78	An urgent solution and interim arrangements must be agreed immediately for the treatment of poultry litter.	A key element of many previous reports by DARD, NIEA, DOE and others

Theme/Sector	No	Recommendations	Previous references/New/Comments
	79	Government must inject pace and commitment into the action plan in this area to secure growing demand in Great Britain.	Neither new nor old – questions around how this could be done – what constitutes pace and commitment?
	80	Government must put in place a proportionate advisory team to service poultry farming development;	Possibly new - Need for more information as to what this means in practice
	81	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	Possibly new as no references could be found
Drinks and Beverages	82	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	Possibly new - Need for more information as to what this means in practice – what about support for smaller companies?
	83	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.	Possibly new - Need for more clarity as to what this means in practice
	84	Alcoholic beverage licensing laws, as they affect alcohol producers, must be reviewed to create a level playing field with Great Britain.	In the public domain recently following calls by the drinks industry
Bakery and Snacks	85	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.	Possibly new as no references could be found
	86	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.	Possibly new as no references could be found
	87	Skills within the Bakery and Snacks sector, including apprenticeships, must be enhanced by building upon the investment which Invest NI and DEL provide.	Possibly new as no references could be found

Theme/Sector	No	Recommendations	Previous references/New/Comments
	88	Energy costs must be reduced, with support from organisations including the Carbon Trust.	Possibly new as no references could be found
Pig	89	Government and the sector must provide a resource dedicated to deliver the recommendations of the Cogent Report 'Review of the Northern Ireland Pig Industry'. They should fund an industry representative body to oversee the implementation of the recommendations.	Partially new – need for further information - Cogent report in existence and Ulster Pork and Bacon Forum exists – would proposed representative body replace the existing forum and would it received money directly from government t or in the form of levy?
	90	Government must appoint an independent veterinary expert to provide strategic oversight of the health of the pig herd and to advise on appropriate corrective action	Review of the Northern Ireland Pig Industry (Cogent report): <ul style="list-style-type: none"> • Sector would benefit from a dedicated pig vet to centrally co-ordinate a Herd Health Improvement Programme
	91	Processors must provide incentives to producers who participate in benchmarking.	Review of the Northern Ireland Pig Industry (Cogent report): <ul style="list-style-type: none"> • Recommend that DARD/CAFRE publish industry benchmark figures for NI, variously ranked and compared with key competitor countries on a regular basis; • Use of incentives for producers also prominent
	92	Government and Industry should define a pilot scheme to prove the viability of the business models discussed and agreed with AFSB.	Possibly new as no references could be found– what models have been discussed and agreed by the AFSB?
	93	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.	Partially new Review of the Northern Ireland Pig Industry (Cogent report): <ul style="list-style-type: none"> • Development of an integrated chain requires the establishment of a Value Chain Management Team led by a senior level representative from each of the companies/stakeholders along the chain
	94	Producers intending to expand beyond IPPC thresholds must consider remodelling the supply chain with sow and rearing units on separate sites to facilitate growth while complying with IPPC requirements on environmental and welfare compliance along with improved disease control.	Review of the Northern Ireland Pig Industry (Cogent report): <ul style="list-style-type: none"> • Our leading producers must find a way to adhere to all relevant environmental and animal welfare legislations, whilst growing their businesses profitably

Theme/Sector	No	Recommendations	Previous references/New/Comments
Arable Crops, Fruit and Vegetables	95	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.	Review and Strategic Priorities for the Development of the Horticulture Industry in Northern Ireland: <ul style="list-style-type: none"> • Develop further all island collaboration and integration for Industry training, education, research and Knowledge Technology Transfer.
	96	Government must develop a support scheme to encourage investment in the planting of new orchards and replanting of existing orchards together with other crops that require high investment but have long delay before viable production is achieved.	Review and Strategic Priorities for the Development of the Horticulture Industry in Northern Ireland: <ul style="list-style-type: none"> • Need for a carefully tailored financial support package to secure productivity gains through re-planting with more intensive orchards.
	97	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.	Review and Strategic Priorities for the Development of the Horticulture Industry in Northern Ireland: <ul style="list-style-type: none"> • Identifies priority areas for funding support including high quality protective cropping structures e.g glasshouses • Need for a carefully tailored financial support package , linked to strategic development priorities for the sector should be introduced to encourage investment in new on-farm technology and production systems
	98	Government must review how research for the arable crops and production horticulture sectors is prioritised and funded.	Review and Strategic Priorities for the Development of the Horticulture Industry in Northern Ireland: <ul style="list-style-type: none"> • Access to scientific research programmes on production technology linked to local industry needs is vitally important and must be sustained.
	99	Government must increase development work with growers to support agronomy training and enterprise benchmarking to encourage efficiency, profitability and business competitiveness.	Review and Strategic Priorities for the Development of the Horticulture Industry in Northern Ireland: <ul style="list-style-type: none"> • Tailored education and training programmes must be linked closely to a) the sector development strategy and b) industry needs; rather than being driven by the demands of the validating bodies. • Training and education should be based on regular and open industry consultation coupled with strong industry representation on CAFRE and other education bodies

Theme/Sector	No	Recommendations	Previous references/New/Comments
	100	An all-island Plant Health Policy must be agreed during 2013 and vigorously implemented.	Partially new A work in progress – recent all island action plan to address Chalara Fraxinea – July 2013
	101	Support must be provided to assist the development of better integrated production and marketing along the arable crops and commercial horticulture supply chains.	Review and Strategic Priorities for the Development of the Horticulture Industry in Northern Ireland: <ul style="list-style-type: none"> Supply chain issues a consistent feature with emphasis on the need to establish best practice in agri-food supply chain logistics
	102	Government must reconsider the rating of certain farm buildings	Possibly new as no references could be found
Fish and Aquaculture	103	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.	On-going CFP reform process – supply/quota issues and wider involvement of the industry in fisheries management are key issues DARD Strategic Plan 2012-20 <ul style="list-style-type: none"> Policy position of decentralisation, transferable fishing concessions and phasing out discards in the Common Fisheries Policy
	104	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 may include co-operation along the supply chain and between key players (industry and Government) to secure and service large-scale market opportunities.	Possibly new as no specific references could be found
	105	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.	Sustainable Development Strategy for Northern Ireland's Inshore Fisheries: <ul style="list-style-type: none"> Currently in development – public consultation exercise closed on the 2nd August 2013 – potential growth in aquaculture highlighted
	106	New opportunities should be explored to harness the resource of Lough Neagh for alternative species.	Possibly new as no references could be found

Theme/Sector	No	Recommendations	Previous references/New/Comments
	107	Potential sources of EU funding must be identified which could be used to support the catching, processing and aquaculture sectors.	New European Maritime and Fisheries Fund: <ul style="list-style-type: none"> Whilst not yet finalised has provisions for the catching, processing and aquaculture sectors What other EU funding sources have potential?
	108	Government funding must be made available to aquaculture projects and catchers should be represented at trade shows, where appropriate, to help convey the clean, green, healthy nature of the local product.	Possibly new - Need for more clarity as to what this means in practice Need for further information – Government will co-finance the EMFF – is funding mentioned here in addition to EMFF? – if so this would be new.
	109	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	Partially new AFBI already provides significant support to seafood sectors as evidenced through the AFBI annual reports. Dedicated access to the DARD funded research programme may be a new development as the DARD funded research programme is agreed on an annual basis.
	110	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.	Our Passion, Our Place, NIEA Strategic Priorities 2012 – 2022: <ul style="list-style-type: none"> Strategic goal - Improved quality of our rivers, lakes, groundwater, coastal waters and wetlands Strategic goal - Clean, safe, productive and biologically diverse seas EC consultation - Opportunities for the development of EU aquaculture: <ul style="list-style-type: none"> Issue of aquaculture as a legitimate and non-consumptive user of water well established by many respondents to the consultation such as the British Trout Association.
	111	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	Possibly new – but issue has been a cause for debate prior to EU commitment to develop Marine and WFD legislation

Theme/Sector	No	Recommendations	Previous references/New/Comments
Animal By-Products	112	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.	Small Business Research Initiative (SBRI), to procure the development of innovative solutions for the sustainable use of poultry litter: <ul style="list-style-type: none"> Contracts are now in place with eight companies for Phase 1. This proof of concept and feasibility stage will enable them to further develop their projects
	113	The proposed single marketing organisation must include indigenous businesses seeking to develop export markets for human or pet food in its remit.	Possibly new as no references could be found
	114	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.	Possibly new as no references could be found
	115	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.	Possibly new as no references could be found
Animal Feeds	116	Feed companies must invest in developing products and staff to help support farmers in maximising the value and performance of their livestock.	Possibly new as no references could be found
	117	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.	DARD Evidence and Innovation Strategy 2009-13 <ul style="list-style-type: none"> Improving food quality, product attributes and system efficiency through process innovation; Exploiting functional foods and food ingredients for human health and wellbeing; The potential exploitation of non-food crops for bio-compounds and biopolymers, e.g. packaging, cosmetics, textiles; and Assessing the potential of the grass crop as a substrate for non-animal feed uses.

Theme/Sector	No	Recommendations	Previous references/New/Comments
	118	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.	Partially new - Independent Food Advisory Group Report already in existence but full implementation is additional