Department of
Agriculture,
Food and the Marine

An Roinn
Talmhaíochta,
Bia agus Mara

Organic Farming Action Plan

2013 - 2015

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Foreword by Mr Tom Hayes T.D.

Minister of State at the Department of Agriculture, Food and the Marine

I am delighted to present this Organic Farming Action Plan 2013 – 2015 on behalf of the Department of Agriculture, Food and the Marine. I would like to dedicate this report to the late, Minister Shane McEntee, who was responsible for the establishment of the Organic Focus Group and who put a huge amount of effort into the development of the Organic Sector in Ireland.

I would also like to thank all the stakeholders on the Organic Focus Group for their input into this document. I know all the members of this Group are fully committed, not only on behalf of their organisations but also on a personal level, to the development of the Organic Sector. I commend them for their ongoing work and dedication. I would also like to acknowledge the invaluable input of those who contributed in any way to the stakeholder consultation sessions.

This Action Plan focuses on actions specific to each sector to facilitate development to their potential as recognised by the Food Harvest 2020 report. The overall strategy is to ensure profitable organic systems which will help maintain existing levels of participation in the Organic Sector and attract new entrants. The four main objectives of this Plan are therefore to:

- Increase the production base in Ireland, with a view to replacing where possible imports with Irish organic produce
- Promote awareness of the potential export market
- Seek to develop sustainable export markets for Irish organic produce as supplies become available
- Identify issues which are impeding the growth of the Organic Sector with an emphasis on developing solutions

I am pleased to be able to give my support to this Action Plan. I assure you that I will do everything I can to assist in achieving these goals and the recommendations within the Food Harvest 2020 Report.

Tom Hayes T.D.
Minister of State, Department of Agriculture, Food and the Marine

1. Executive Summary

In July 2012 a new group called Organic Focus was established (See Appendix I). The Organic Focus Group is made up of a wide range of stakeholders and provides a forum for discussion on issues that substantially impact the Organic Sector with the stated objective of identifying solutions where possible and developing strategies to progress the Organic Sector for the benefit of all.

One of the stated goals of the new Organic Focus Group is to develop a new Action Plan with a more realistic focus for development within the resources currently available. Consequently this Organic Farming Action Plan 2013-2015 was produced by the Organic Focus Group following consultation with various sectoral representatives and is the culmination of their efforts.

The Organic Farming Action Plan 2013-2015 launched by the Department of Agriculture, Food and the Marine provides a framework to address issues that have been identified. The Action Plan firstly identifies five broad sectoral objectives which it believes are of vital importance to the development of the entire Organic Sector. The Action Plan then focuses on five specific sectors namely organic beef and sheep, organic milk, organic fruit and vegetables, organic aquaculture and organic cereals. We have investigated the potential of organic poultry and pork and have found that the potential for growth is much more challenging. It proposes key actions to address sector specific issues and thereby aims to assist the Organic Sector to realise its potential for growth as identified within the Food Harvest 2020 Report. The timeframe to progress the sector specific actions is classified into three main categories: short-term, medium-term and long-term.

Recent Bord Bia research commissioned by the Department and information received from organic processors shows that fragmentation within the industry is hampering retailers and processors ability to find consistent stock levels necessary to drive growth in the sector. This influenced directly or indirectly many of the actions identified in this report.

In conclusion, this document produced by the Organic Focus Group is only a starting point for further development of the Organic Sector. A multi-agency approach with the co-operation of all relevant stakeholders is vital to ensure optimum results. The actual timeframe to achieve progress will ultimately be determined by the nature of the issue, the resources available and the buy-in by all relevant stakeholders.

2. Introduction

The organic sector in Ireland remains very small in relation to agriculture as a whole. As at February 2013 there were 1,639 organic operators in Ireland with over 52,000 hectares of land under organic production methods, which equates to just under 1.2% of our utilisable agricultural area. The retail value of the Irish organic market as of February 2013 was €100 million approximately (Kantar Statistics). In addition, the value of direct sales is estimated to be €15 million.

The Programme for Government in 2007 included an objective of having 5% of farmland under organic production by 2012. The Food Harvest 2020 Report which maps out policy for the next ten years endorses this target but highlights the requirement for actions in a number of areas including promotion, marketing, innovation, research and product development.

From the Food Harvest Report, it is important to note that the most compelling picture that emerges of the decade ahead is one of opportunity. This report highlights the opportunity for the Irish agri-food industry to grow and prosper sustainably through the delivery of high-quality, safe and naturally based produce. Organics is a forerunner in this regard and this Action Plan aims to enable the Organic Sector to avail of the opportunities that clearly exist.

The importance of our indigenous agriculture and food industry has never been as high. It is widely recognised as being fundamental to our export led economic recovery. The Organic Sector can play a role in this development. It is important therefore that all the relevant stakeholders including organic producers, processors, Organic Control Bodies and state agencies work together to ensure the Organic Sector in Ireland can realise its full potential.

Ireland’s first Green Public Procurement Action Plan “Green Tenders” commits the public sector to playing an exemplary sustainability role through its procurement activities. This Plan places due emphasis on local sourcing and sustainability both of which are positives from an organic perspective.

Experience in other Member States has shown that the availability of public procurement opportunities gives confidence to medium to large scale conventional operators to convert in full or part to organic production. Public procurement schemes have boosted organic consumption in other EU countries. Consequently it is hoped that this new green public procurement plan will offer more domestic opportunities for organic producers in the years ahead and be a driving force for growth of the Organic Sector in Ireland.

While it is accepted that there are more challenges ahead, such as the abolition of milk quotas, it is also widely recognised that the provisions of the new CAP present a time of great opportunity for the Organic Sector. The provision for a new Organic Farming Scheme within the CAP is perceived as a huge opportunity to review and enhance the effectiveness of the Scheme to achieve continuity of commitment to organics while simultaneously attracting new entrants into the Organic Sector.

Building on the supports that currently exist such as the Organic Farming Scheme and the Scheme's of Grant Aid for the Development of the Organic Sector, and on successful initiatives to date such as the demonstration farm programme and Irelands participation at Biofach, combined with the welcome development of Green Tenders, the key actions identified within this Action Plan aim to address obstacles to growth and better position the Irish Organic Sector to realise its potential.

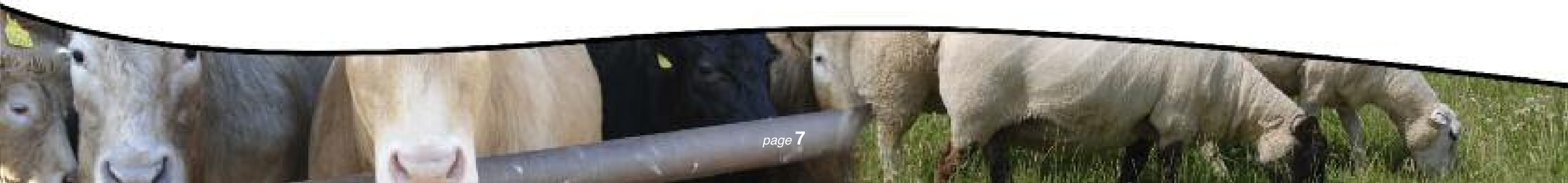
3. Cross Sectoral Recommendations

CROSS SECTORAL RECOMMENDATIONS				
	Key Issues	**Key Actions**	**Responsible**	**Time Frame**
1	**Market Development**	• Identify specific domestic and export markets and engage with stakeholders to develop supply chain to meet demand. • Support SME's or artisan producers to develop to their full potential. • Support the formation of producer groups and co-operatives to facilitate growth in the sector through the development of further market opportunities and associated infrastructure requirements.	Bord Bia Teagasc OCBs	ST
2	**Training & Education**	• Maintain existing advisory support services and establish potential to provide specialist short-term advice where required. • Organic courses should increase emphasis on markets and linkages to processors. • Encourage third level educational institutions to incorporate an organic module. • Seek to incorporate organics as a Department of Education module at primary and/or secondary level. • Work with existing organic training providers to identify and co-ordinate the training needs of the sector.	Teagasc DAFM Dept Education	MT
3	**Organic Farming Scheme**	• Seek to enhance the effectiveness of the new Organic Farming Scheme as a means of maintaining current levels of participation in the organic sector and attracting new entrants. • Seek to enhance the effectiveness of the Scheme in responding to the market demand for organically produced food.	DAFM	ST
4	**Increase Consumer Awareness**	• Seek to increase consumer awareness of locally produced organic food and in season organic produce.	Bord Bia	ST
5	**Green Public Procurement**	• Support and assist the development of Green Public Procurement opportunities from an Organic perspective. • Attempt to achieve a baseline commitment for organic produce under Public Procurement Contracts.	DAFM DECLG	MT

4. Organic Beef & Lamb

Ireland is self-sufficient in the production of organic red meat for the home market. From research carried out we know that there is scope for a big increase in exports. Our main processors tell us that they cannot even meet the existing demand, particularly for beef, from countries like Germany where the organic market has continued to grow despite the recession. The largest EU market for organic products in 2011 was Germany with a turnover of 6.6 billion euro, followed by France (3.8 billion euro) and the UK (1.9 billion euro). In the conventional sector, we export 90% of the beef we produce. In the organic sector, clearly, there is much the same scope for exporting a multiple of what we consume at home. The challenge is to increase the scale and continuity of supply from producers here at home. One obstacle to the expansion of the livestock sector is an under-supply of organic cereals. The difficulty again for Irish lamb is ensuring a regular supply. There are big export opportunities also for value-added products.

The key actions proposed in respect of the organic beef and sheep sector, set out on page 8, aim to establish accurate supply statistics, identify market potential, address inefficiencies in the supply chain, encourage processors to set base prices, maintain existing suppliers and encourage new entrants. Following consultation with relevant stakeholders, the key message was the importance of the Organic Farming Scheme (OFS) to any future development. This priority is reflected in the key actions proposed within this Action Plan. The importance of training and education is also highlighted.



ORGANIC BEEF & LAMB - KEY ISSUES & OBJECTIVES

	Key Issues	Key Actions	Responsible	Time Frame
1	**Market potential for Irish Organic Beef**	• Teagasc survey of processors to establish market potential and Bord Bia research to establish opportunities. • Communicate market requirement to organic stakeholders and potential entrants to organic farming through Teagasc, Organic Control Bodies (OCBs) and Media.	Bord Bia Teagasc DAFM Processors OCBs	MT
2	**Need to establish accurate supply statistics in respect of organic produce**	• Carry out census of production to establish supply and circulate information to relevant stakeholders • Determine data requirements in advance to enable software development.	DAFM Teagasc OCBs	ST
3	**Requirement to increase participation in Organic Farming Scheme**	• Substantiate through analysis income foregone and costs compared to conventional to seek justification for increased payments under the proposed new OFS. • Engage with relevant stakeholders to advance this objective. • Carry out a survey of conventional farmers to identify the perceived barriers to entering the organic sector.	Teagasc DAFM	ST
4	**Establishment of Premium Price Range**	• To encourage processors to set out base price in order to maintain existing suppliers and encourage new entrants.	Processors	MT
5	**Supply Chain Inefficiencies**	• Identify supply chain inefficiencies and barriers to sales and take action to optimise output. • Approval of more abattoirs (subcontractors) – OCBs need to be able to share information to prevent over burdening inspection frequency.	Teagasc OCBs	MT
6	**In-depth Comparative Analysis & modelling of Organic Systems**	• To carry out comparative analysis & modelling between profitability of organic farming and conventional farming and publish results. • Survey to identify obstacles/reasons for non-entry of conventional farmers into sector.	Teagasc & OCBs	MT
7	**Requirement for more Training and Education**	• Publish advice on Best Practice farming, including grazing, silage, haymaking and animal husbandry. • Extend Demonstration Farm Programme to incorporate winter months. • Promote Organic Producer Discussion Groups. • Encourage Processors to participate in Bord Bia Supplier Development workshops.	Teagasc Bord Bia	MT

5. Organic Dairy

Issues from an organic dairy perspective appear to be the need to encourage new producers into the sector and to develop the critical mass necessary to secure export markets. While the identification of specific markets and development of the supply chain to meet demand were highlighted by the organic dairy stakeholders, the undersupply of cereals and forward planning for non-quota environment were key concerns. The key actions set out hereunder require a multi-agency approach to address issues identified.

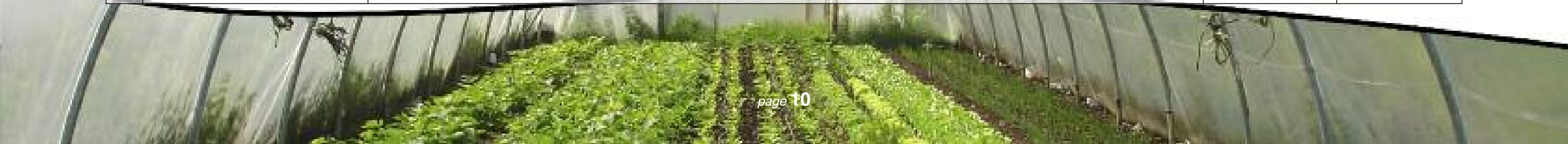
ORGANIC DAIRY - KEY ISSUES & OBJECTIVES				
	Key Issues	**Key Actions**	**Responsible**	**Time Frame**
1	**Market Led Development required**	• Identify specific domestic & export markets and engage with stakeholders to develop supply chain to meet demand. • Identify large processors and survey to establish what would attract them into the sector and barriers to involvement.	Bord Bia Organic Trade Research	ST
2	**Insufficient Information on the current supply/demand**	• Producer Survey to identify milk pool and supply pattern over the next five years and survey of Processors to identify required demand.	Organic Unit DAFM & Milk Policy Division DAFM	ST
3	**Profitability in Non Quota environment. Organic system has lower stocking rates leading to lower output per hectare**	• Identify profitability of current organic dairy farmers and potential for increase. • Assess the economics of organic dairy systems in a post quota environment.	Teagasc & Producers	MT

6. Organic Horticulture

In horticulture, we are a long way from even being able to supply the home market. Research by Bord Bia, has established that some 70% of organic fruit and vegetables are imported. Some of this, of course, could not be grown in the Irish climate, but a great deal of it could. Recent Bord Bia research has established the need to increase the supply of certain fruit and vegetables lines in accordance with market demand. From a market development perspective, it is important to note that the key finding of the Bord Bia research is that fragmentation within the industry is hampering retailer's ability to be able to find consistent stock levels necessary to drive growth.

The necessity to establish the current levels of production and the potential to increase supply are essential prerequisites to market development in respect of organic fruit and vegetables. The key actions set out below, which encompass research and development, education and encouraging producers to work together, aim to increase supply to meet demand.

ORGANIC HORTICULTURE - KEY ISSUES & OBJECTIVES				
	Key Issues	**Key Actions**	**Responsible**	**Time Frame**
1	**Market Scope – Demands – Establish Facts**	• Engage with current retailers and distributors of organic Fruit & Veg to establish current factual demand for in season products. • Carry out census of domestic production. • Identify potential for import substitution and quantify level of staple organic imports which could be grown in Ireland. • Examine potential to supply organic ingredients to large volume products such as baby food etc.	Bord Bia or DAFM Marketing Personnel	MT
2	**Present Production Volumes**	• Issue questionnaire to all existing commercial organic growers to establish their current production volumes and their capacity to increase in the future.	OCBs DAFM	ST
3	**Research & Development**	• Conduct funded practical trials on nutrition and crop density for main volume crops required by all markets. • Investigate varieties that adapt well under Irish growing systems and conditions.	Teagasc DAFM	MT
4	**Education**	• Encourage students attending Horticultural Food Production courses to work on an approved Organic Fruit & Veg farm as part of their practical module. • Accredited FETAC Level 5 and 6 and Postgraduate courses to be developed in conjunction with universities.	Teagasc	MT
5	**Initiatives & Farm apprenticeship**	• Examine the potential to support organic farmers through the Back to Work Scheme, Internships Scheme and explore potential for Farm Apprenticeship Scheme. • Examine the potential to bring in 'Small Farm Scheme' under new CAP within organic payment structure.	Dept of Social Protection DAFM	ST
6	**Advisory & Field Visits**	• Establish potential to provide funded specialist short-term advice to fruit and vegetable farmers to advise on profitable methods of production and marketing.	Teagasc DAFM	MT



7. Organic Aquaculture

The premium nature of salmon, along with its popularity, makes it the key pillar of the organic fish category. Organic Mussel Farming is also an increasingly important export product. However supply for these and other categories is hampered by licensing issues which restrict the ability of the industry to supply the current level of demand. The scope for growth of the organic aquaculture sector is recognised by all stakeholders. The main focus of actions for organic aquaculture listed hereunder seeks to address this issue but also recognise other issues that require attention.

ORGANIC AQUACULTURE - KEY ISSUES & OBJECTIVES				
	Key Issues	**Key Actions**	**Responsible**	**Time Frame**
1	**Market Potential** **Almost 70 % of all seafood consumed in Europe is imported**	• Assist and encourage marketing under national quality and environmental management schemes through Bord Bia promotion. • Improve enforcement of consumer labelling regulation showing country of Origin or Certification Options, in accordance with governing regulation/s. • Encourage more added value production by Irish processing companies using Irish raw materials. • Feasibility study to establish setting up of organic fish feed manufacturing. • Explore the export market potential for organic seaweed and shellfish with particular emphasis on Asian markets. Explore the export market potential for organic fin fish other than salmon e.g. Arctic Char and trout.	Bord Bia OCBs DAFM BIM	MT
2	**Complex Aquaculture framework & Licence Appeals system**	• Reform the public consultation process to reflect a transparent approach to licensing. • Reform and resource the Aquaculture Licence Appeals Board to reflect its legal basis. • Set Time limits for decision making on all applications. • Rationalisation required, consolidate and streamline all administration under single agency. • Continue to lobby and influence at EU level for harmonised aquaculture legislation.	BIM DAFM DECLG	MT
3	**Task Force**	• Seek to set-up Aquaculture Task Force in conjunction with the Department's (DAFM) Aquaculture and Foreshore Managements Division to implement rationalization and consolidation process.	DAFM	MT
4	**Availability of EU & National grants**	• Seek to remove restrictions on access to grant aid in NATURA 2000 areas. (50% grant aid to promote organic) • Seek to include grant aid for organic salmon farmers.	DAFM	ST
5	**Capital Funding**	• Assist producers with practical issues such as raising capital for long-term licences creating tangible value for investors. • Seek the provision of EU funds to assist in naturally occurring algal bloom or pollution incidents under the next National Seafood Operational Programme (2014 - 2020).	DAFM BIM	MT
6	**R&D**	• Focus R&D funding into practical science to promote self-sufficiency in juvenile production, improved growth and disease management, logistics, early warning systems for plankton and jellyfish, predator management, adaptation of technology to Irish conditions, etc.	DAFM BIM	MT

8. Organic Cereals

The key message from stakeholder consultation in respect of organic cereals is one of opportunity, potential for growth and import substitution. While a large proportion of the total tillage crop is dedicated to oats, there is insufficient supply of organic cereals and proteins to meet demand. The issue of developing demand for other organic tillage crops was highlighted by stakeholder consultation. The potential opportunity for import substitution by developing an animal feed industry based in Ireland is clear. The actions hereunder are critical if the potential for growth that exists is to be realised.

ORGANIC CEREALS - KEY ISSUES & OBJECTIVES				
	Key Issues	**Key Actions**	**Responsible**	**Time Frame**
1	**A large percentage of Irish market for organic feed currently being supplied from outside of Ireland**	• Encourage large scale organic tillage farmers to set up small scale feed manufacture e.g. one coarse feed initially rather than complete range of pellets etc. • Establish the quantity and type of organic feed being imported into the country to determine if and how these can be replaced by home grown produce.	Teagasc DAFM	MT
2	**Insufficient supply of Cereals & Proteins being grown**	• Continue advising farmers to grow organic cereals and proteins to supply the existing market. • Research and cropping trials. • Trial of equipment and varietal trials that aid cereal production.	Teagasc DAFM	MT

Appendix I – Organic Focus Group

Name	
Mel O`Rourke (Chairman)	Sylvan Ireland,
Birgitta Curtin	The Burren Smokehouse,
Cait Curran	Biodynamic Organic operator
Dan Clavin	Organic Specialist ,Teagasc
John Flahavan	E Flahavan & Sons Ltd,
John Paul Crowe	Crowe’s Farm
Lorcan Bourke	Bord Bia
Padraic Connelly	Organic Farmer
Peter Young	Irish Farmers Journal
Richard Galvin	Clashganny Organic Farm
Joan Furlong	Organic Unit, DAFM,
Kevin McGeever	Organic Unit, DAFM,
John Purcell	Good Herdsmen Ltd

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