



Rialtas na hÉireann  
Government of Ireland

## EXECUTIVE SUMMARY

# Food Vision 2030

A World Leader in  
Sustainable Food Systems



© Department of Agriculture, Food and the Marine

Original images provided by Bord Iascaigh Mhara, Bord Bia and Jack Caffrey || The Pimlico Project.

# CONTENTS

The Vision	1
The Wider Context and the Need for a Ten Year Agri-Food Strategy	3
A New, Food Systems Approach	5
Three Pillars of Sustainability	6
Four Missions for the Agri-Food Sector to 2030	8
<b>Mission 1</b>	
A Climate Smart, Environmentally Sustainable Agri-Food Sector	10
<b>Mission 2</b>	
Viable & Resilient Primary Producers with Enhanced Wellbeing	12
<b>Mission 3</b>	
Food which is Safe, Nutritious and Appealing, Trusted and Valued at Home and Abroad	14
<b>Mission 4</b>	
An Innovative, Competitive & Resilient Agri-Food Sector, Driven by Technology and Talent	15
Communicating the Strategy's vision	16
Implementation and Oversight	17
Goals and Indicators	18





# THE VISION

## The 2030 Vision for Ireland's Agri-Food Sector

Ireland will become a world leader in Sustainable Food Systems (SFS) over the next decade. This will deliver significant benefits for the Irish agri-food sector itself, for Irish society and the environment. In demonstrating the Irish agri-food sector meets the highest standards of sustainability – economic, environmental, and social – this will also provide the basis for the future competitive advantage of the

sector. By adopting an integrated food systems approach, Ireland will seek to become a global leader of innovation for sustainable food and agriculture systems, producing safe, nutritious, and high-value food that tastes great, while protecting and enhancing our natural and cultural resources and contributing to vibrant rural and coastal communities and the national economy.

To realise this Vision, the Strategy has adopted four high level Missions for the agri-food sector to work towards in the period to 2030.



# THE WIDER CONTEXT AND THE NEED FOR A TEN YEAR AGRI-FOOD STRATEGY

For the purposes of this Strategy, the Irish agri-food sector includes primary agriculture, food and drink processing and manufacturing, fisheries, aquaculture and fish processing, forestry and forestry processing and the equine sector. It is Ireland's oldest and largest indigenous industry. In 2020, the sector accounted for almost 7% of modified Gross National Income (GNI\*) and 10% of exports in value terms. It employs approximately 164,400 people, representing 7.1% of total employment. At primary production level, some 137,500 farms, over 770,000 hectares of forest, over 2,000 fishing vessels and some 180 aquaculture sites produced an estimated €8.5 billion in output in 2019. The agri-food sector grew substantially over the past decade, with Irish food and drink exports increasing from by 60% from €8.9 billion in 2010 to €14.2 billion in 2020. The sector produces food and ingredients with a global reputation for quality and safety, with a livestock sector built on an enviable grass based production system. Global demand for high quality food is increasing with population, urbanization and affluence, and the Irish agri-food sector is well placed to play a role in meeting this demand.

## PRIMARY PRODUCERS

Primary producers – farmers, fishers and forest owners – are fundamental to this Strategy and are the foundation for the entire sector. Primary producers' economic viability is crucial not only in terms of their ability to make a decent livelihood and return for

their endeavours, but also in helping to deliver on environmental and social sustainability. The social sustainability of primary producers is all too often an over-looked dimension. Social factors such as generational renewal, gender balance, education and training, health and safety, mental health and wellbeing and broader rural development need to be considered and improved.

Negotiations on the new Common Agricultural Policy (CAP) are being finalised at the time of writing this Strategy. The next CAP will provide in excess of €10.6 billion in EU funding to farmers and rural communities in the period from 2023 to 2027. Ireland has been consistent on the need for a strong CAP and has also stressed the need to ensure better environmental and climate outcomes for the CAP. Central to environmental ambitions is the protection of farm incomes and a just and inclusive transition. Meanwhile, the Common Fisheries Policy (CFP) is reviewed every 10 years and the next review is scheduled to be completed by end 2022 when the European Commission will report to the European Parliament and the Council on the functioning of the CFP. When the report has been presented, if any changes are required, the Commission will bring forward a proposal for an amendment of the CFP Regulation. Ireland will be seeking that the upcoming review of the CFP must address the disproportionate impact on the Irish fishing industry by Brexit. The new EU-UK Trade and Cooperation Agreement (TCA) will have a particularly significant impact on the seafood sector. A Seafood Sector Taskforce has been established to examine the implications arising from the TCA for the sector and the coastal communities who depend on it. The Task Force, involving seafood industry representatives and other stakeholders, will recommend measures to mitigate the impacts of the fish quota share

reductions, on the Irish fishing industry and on the coastal communities that depend on fisheries. In its interim report, published in June 2021, the Taskforce recommends that a voluntary tie-up scheme be put in place for the period September to December for the approximately 220 polyvalent vessels and beam trawlers directly impacted by the quota transfers under the TCA. The interim report also recommends a range of initiatives to address the quota reductions in the TCA. These recommended actions will be considered further by the Taskforce and will be set down in detail in the Taskforce's main report.

The European Green Deal, Circular Economy and Biodiversity Strategies, as well as higher health and environmental ambition in the Farm to Fork Strategy that will be reflected in the next common agricultural and fisheries policies, will have consequences for primary producers. Taken together, they will require substantial change in how we farm and fish, manage our forests and how we process, distribute and consume food and bio-based products. Coupled with national policy developments, higher standards and constraints across a range of indicators can add to the cost of production. While the Strategy supports the direction of these policies, Ireland will need to proactively engage to influence the direction of the implementing regulations under each of these initiatives, to take account of national circumstances and legitimate interests and concerns. In addition, detailed impact assessments will need to take place. Consideration will be needed as to where the burden of these costs will lie, with the primary producer, food distributors or processors, retail, food service, consumers or public funds. It is clear that primary producers alone cannot be expected to bear this cost.

## THE ENVIRONMENT

Agriculture has a key role in protecting both our climate and environmental credentials. The sector is the largest contributor to Ireland's greenhouse gas emissions, accounting for around a third, and from an air quality perspective is almost exclusively responsible for ammonia emissions. While challenging from an Irish perspective, and unusual in an international context, these facts are reflective of the economic, and historical, importance of agriculture in Ireland, relative to other industries. As the predominant land use in Ireland, agriculture exerts significant pressure on water quality. Changes in agriculture, forestry and fishing activities have also impacted on biodiversity on land and sea. While overall bovine numbers have remained relatively stable, the removal of milk quotas has led to an expansion in the dairy herd, resulting in particular environmental pressures. However all farming systems have a role to play in reducing agriculture's impact on climate and the environment.

Facing into the decade to 2030, the agri-food sector can make significant and urgent improvements in its environmental footprint. With leadership from stakeholders, the sector can take the steps necessary to improve its environmental performance and protect and enhance its reputation as a sustainable producer of quality food. It will also mean that Ireland can take a leading position internationally as an advocate of Sustainable Food Systems.

## FOOD, MARKETS, HEALTH AND NUTRITION

Ireland's agri-food system, including its farmers, fishers and food businesses, plays a vital role in the daily lives

not only of the Irish population, but millions more across the globe. Exporting around 90% of output, feeding and nourishing people at home and abroad, the sector has a lot to be proud of. Indeed, its role in ensuring safe, secure supplies of quality food and drink was brought to the fore during the COVID-19 pandemic, and this has re-awakened consumer appreciation for where their food comes from and how it is produced, processed, distributed and sold.

Food security and nutrition is a key component of Sustainable Food Systems, particularly the link between food and health. It is important that the sector contributes to ensuring coherent food and health policies that deliver improved health outcomes.

National and international consumer and trade customer trends are evolving and complex. However one aspect that can be considered a constant is an expectation that the food and drink is safe, traceable and authentic, and produced, processed and sold in a transparent, ethical manner. Ireland's agri-food sector already has a strong reputation, but must continue to assess its own performance and evolve to keep up with changing demands in these areas. The need for in-depth consumer insight, and the creation of value added through innovation and product differentiation, is hugely important.

Tremendous progress has been made in the last decade in expanding the reach of Irish food and drink to consumers across the globe. Selling into international markets is challenging, and the sector has to be agile and ready to develop and capitalise on business opportunities that arise. A fair, balanced, and rules-based international trading system is also a key enabling factor in this. Evolving consumer

trends in the domestic market, accelerated during the Covid-19 pandemic, will also open up new and exciting opportunities for businesses in the coming decade.

## INNOVATION, COMPETITIVENESS, TECHNOLOGY AND TALENT

With highly competitive global markets, the sector has to work hard to protect its reputation and continuously strive to innovate and maintain a level of competitiveness and resilience that enables it to prosper and develop in a globalised trading environment.

An effective innovation system, a strategic approach to R&D funding and an engaged and responsive knowledge exchange environment are fundamental. The decade between 2020 and 2030 is likely to see





even greater advancements in the use of technology and data in farming, fishing and forests and in food and drink companies. Precision agriculture is evolving at a rapid rate and it is critical that Ireland's agri-food sector is positioned to take advantage of this.

A further key fundamental is having the optimum mix of diverse, skilled, and appropriately trained talent. The sector has to compete with many others in attracting and retaining people from primary production level right up to consumer interfacing positions.

## DEVELOPING A STRATEGY IN THIS CONTEXT

The agri-food sector in Ireland has benefited from an approach to strategic planning involving the development of ten-year stakeholder-led strategies, updated every five years. Since their inception twenty years ago, up to the current Food Wise 2025 plan, these strategies have provided the sector with a coherent, stakeholder-led vision, to underpin its continued development. This form of 'participative' deliberation and involvement in preparing the Strategy means that the sector itself is its owner and has a strong vested interest in successful implementation.

In November 2019, a committee of stakeholders in the agri-food sector, chaired by Tom Arnold, was established. Its terms of reference required it to outline the vision and key objectives, with associated actions, to ensure the economic, environmental and social sustainability of the agri-food sector in the decade ahead. The Committee met throughout 2020 and into 2021, deliberating on a wide range of opportunities and challenges facing the sector, within the broad context outline above. In parallel, a Strategic

Environmental Assessment (SEA) and Appropriate Assessment (AA) were prepared independently to determine the likely significant effects on the environment of implementing the Strategy. These were then published as part of a public consultation, the results of which were considered by the Stakeholder Committee prior to finalising the Strategy.

## A NEW, FOOD SYSTEMS APPROACH

The interconnectedness of policies for food, health, climate and the environment in addressing the great global challenges is clear and has come into increasing focus at international level. The central theme of this Strategy is that this interdependence should be recognised within national policy, by using a food systems approach.

The term 'food system' covers 'all the elements and activities that relate to the production, processing, distribution, preparation, and consumption of food, and the output of these activities, including socio-economic and environmental outcomes'. A sustainable food system (SFS) is profitable throughout (economic sustainability), has broad-based benefits for society (social sustainability) and has a positive or neutral impact on the natural environment (environmental sustainability). Each country has its own distinctive food system, based on its natural resource base, climate, production patterns, eating habits and history. Food systems are expected to provide food security and nutrition for a world population which is projected to grow to nearly 10 billion by 2050. Food systems are also central to the livelihoods of hundreds of millions

of households around the world. Moreover, they are not only highly dependent on the environment, but also exert significant pressure on it. To speak of a food system is to broaden the perspective beyond agriculture and to recognise the inter-connected concerns of health, wellbeing, its diverse cultural meanings, the skills, knowledge and self-esteem that it promotes, and its role in strengthening community.

While each ten-year Strategy was of its time and was determined by the circumstances of the time, this Strategy to 2030 signals a significant change in direction and policy compared to previous strategies. It has been drawn up using a 'food systems approach' which acknowledges the link between policies for food, climate, the environment, and health (human, animal and planetary), and focuses on the role each part of the food chain has in delivering the 2030 vision. These features of a food systems approach are woven throughout the Strategy, particularly in the Missions and Goals. Moving towards a SFS should meet the needs of Irish society and position Ireland internationally in its trade and other relationships. **The future source of competitive advantage for the Irish agri-food sector lies in being able to demonstrate that it meets the highest standards of sustainability (in all its forms), such that it can be considered among the world leaders in this field. This is the basis on which Ireland can meaningfully build on its 'green' reputation and aspire to gaining market share in high value international markets and in certain cases, gaining a premium price for what it sells.**

If this ambitious objective is to be achieved, Ireland's agri-food sector, along with Government and society, will have to make significant changes. The sector should aim to become climate-neutral by 2050, with

verifiable progress by 2030, encompassing emissions, biodiversity and water quality. The Strategy signals actions aimed at making the sector more diversified, resilient and based on circular economy principles. It proposes expansion in nature-based production systems (considered as carrying out farming activities designed to result in agricultural, ecological and climate benefits on the farm), tillage, horticulture, afforestation and organic production. But the core of Ireland's agri-food output will continue to be grass based livestock production wherein lies Ireland's natural competitive advantage. Given that 80-90% of output is exported, the long-standing policy of supplying an increasingly diversified range of export markets and developing new high-value markets will continue. The aim is to secure a premium price for as high a percentage as possible of Irish output and ensure that this premium is shared across the value chain, including the primary producer. In aiming to become an international leader in SFSs, a consistent policy framework and a culture of continuous improvement across all the actors in the food chain will be required.

Ireland is likely to be one of the first countries in the world to develop a national agri-food strategy using a food systems approach. The Strategy will provide a coherent policy framework for Ireland to make an important contribution to the international discussion taking place on food systems over the coming years, and in particular the UN Food Systems Summit (FSS). A probable outcome of these discussions will be a greater prioritisation, at national and international level, of a sustainable food system approach in future planning.

In committing to this Strategy as a pathway to achieve such improvement, Ireland's agri-food sector aims to become a thought, policy and practice leader in SFSs. If

such a leadership position can be attained, particularly at the Food Systems Summit in September 2021, this could provide the basis for a continuing leadership role during the coming decade. It is also likely to open opportunities for international collaboration, with Ireland becoming a leading supplier of policy advice and services to countries adopting their own SFSs, particularly in Africa.

## THREE PILLARS OF SUSTAINABILITY

The terms of reference for the Stakeholder Committee were explicit in stating that the sustainability of the agri-food sector to 2030 be considered in three dimensions – economic, environmental and social. The pressure on the agri-food sector to deliver sustainability comes from a powerful combination of changing societal demands, consumer behaviour, political decisions, and the requirements of major trade customers for Irish food and drink. In addition, there is an increased focus on our legal and social responsibilities to care for the environment for future generations, and an improved understanding of how fundamental a healthy environment is for producing healthy and nutritious food.

The three sustainability components are not compartmentalised and there is an important interplay between them. Working towards each dimension of sustainability draws on policies across the four Missions that have been established. The Strategy recognises that economically sustainable farmers, fishers and forest owners are an integral part of the rural and coastal community and that

healthy environments, ecosystems, communities and economies go hand in hand. It recommends policies that present opportunities to primary producers of high quality, safe food and fibre. It also points the way to primary producers being providers of a much broader range of ecosystem services, so while continuing to produce food, they will also be engaged in areas such as sequestering and capturing carbon, cutting ammonia and methane emissions, supporting biodiversity, managing water resources, and protecting and enhancing soil health. These in turn contribute to social sustainability. More needs to be done at EU and national level to agree the policy instruments and incentive structures to support these policies and expanded range of ecosystem services which citizens and consumers demand and which are crucial to the health of our planet and our society.

In moving towards sustainability becoming more embedded in the agri-food system, the issue of policy sequencing, timeframes for implementing policy change, and the use of the Just Transition approach will be important. Just Transition acknowledges that in moving to a climate resilient and low carbon sector, policy should seek to ensure that the change is fair for producers, workers and communities. There are trade-offs between the different dimensions of sustainability. These need to be acknowledged and a willingness shown to reach realistic compromises on the direction of change and the speed at which it can take place. This Strategy sets out the framework from which such choices and decisions can be made.



# FOUR MISSIONS FOR THE AGRI-FOOD SECTOR TO 2030

The Strategy has adopted a framework which revolves around the concept of high-level Missions which are underpinned by a series of key goals and actions. This reflects a movement in recent times to mission-oriented policy which responds to 'grand challenges' and moves away from narrow sector-based approaches to more system-wide transformation. This Strategy has four Missions and 22 Goals.

## MISSION 1

### A CLIMATE SMART, ENVIRONMENTALLY SUSTAINABLE AGRI-FOOD SECTOR

- GOAL 1:  
Develop a Climate Neutral Food System by 2050 and Improve Air Quality
- GOAL 2:  
Restore and Enhance Biodiversity
- GOAL 3:  
Protect High Status Sites and Contribute to Protection & Restoration of Good Water Quality and Healthy Aquatic Ecosystems
- GOAL 4:  
Develop Diverse, Multi-functional Forests
- GOAL 5:  
Enhance the Environmental Sustainability of the Seafood Sector
- GOAL 6:  
Embed the Agri-Food Sector in the Circular, Regenerative Bioeconomy
- GOAL 7:  
Strengthen Origin Green & Sustainable Supports to Reflect the Higher Level of Ambition

## MISSION 2

### VIABLE AND RESILIENT PRIMARY PRODUCERS WITH ENHANCED WELL-BEING

- 
- GOAL 1:**  
Improve the Competitiveness and Productivity of Primary Producers
  - GOAL 2:**  
Improve the Creation and Equitable Distribution of Value
  - GOAL 3:**  
Increase Primary Producer System Diversification
  - GOAL 4:**  
Improve the Social Sustainability of Primary Producers

## MISSION 3

### FOOD WHICH IS SAFE, NUTRITIOUS AND APPEALING, TRUSTED AND VALUED AT HOME AND ABROAD

- 
- GOAL 1:**  
Prioritise Coherent Food and Health Policies to Deliver Improved Health Outcomes
  - GOAL 2:**  
Enhance Consumer Trust in our Food System, Providing Evidence of a Safe, Ethical Food Supply
  - GOAL 3:**  
Create Value-Add in Food Through Insight, Innovation and Product Differentiation
  - GOAL 4:**  
Develop Market Opportunities at Home and Abroad

## MISSION 4

### AN INNOVATIVE, COMPETITIVE AND RESILIENT AGRI- FOOD SECTOR, DRIVEN BY TECHNOLOGY AND TALENT

- 
- GOAL 1:**  
Move to a Challenge-Focused Innovation System
  - GOAL 2:**  
A Strategic Funding Approach for Research, Development and Innovation
  - GOAL 3:**  
Develop a Dynamic Knowledge Exchange Environment
  - GOAL 4:**  
Enhance the Use of Technology and Data
  - GOAL 5:**  
Maintain and Improve Competitiveness and Resilience
  - GOAL 6:**  
Attract and Nurture Diverse and Inclusive Talent
  - GOAL 7:**  
Policy Coherence in Sustainable Food Systems Between Ireland's Domestic Policy and its Development Cooperation and Foreign Policy

## MISSION 1: A CLIMATE SMART, ENVIRONMENTALLY SUSTAINABLE AGRI-FOOD SECTOR

The Strategy takes a systematic approach to addressing the challenge of ensuring that Ireland can continue to produce high quality food in a manner that protects the environment and mitigates climate change. Previous agri-food strategies, particularly Food Wise 2025, have highlighted the importance of environmental sustainability, but this Strategy brings it to a new level of centrality and commitment. The Strategy has the objective of achieving a climate-neutral food system by 2050, with verifiable progress achieved by 2030, encompassing emissions, biodiversity and water quality, as well as a range of other targets for forestry, fisheries, organic farming and food waste. The Mission takes a detailed, systematic approach to address each aspect of the environment – climate, ammonia, biodiversity, water, forests, seafood, the bioeconomy, food loss and waste, and packaging.

Working towards a climate-neutral food sector by 2050 will happen within the framework of the five-yearly sectoral budgets provided for under the auspices of the Climate Action and Low Carbon Development Bill, to be decided during 2021. In advance of these decisions, the Strategy outlines a roadmap to deliver on the ambition of a climate-neutral sector by 2050.

This strategy builds on Ag Climatise, the roadmap for delivering the emissions reductions targets for

Agriculture in the Government's Climate Action Plan 2019. Ag Climatise includes 29 actions, largely based on evidence from the Teagasc Marginal Abatement Cost Curves, that aim to reduce the sector's environmental footprint. It represents a foundation stone upon which the additional measures in this Strategy will build and will be updated on a regular basis.

Ag Climatise makes clear that any increase in biogenic methane emissions from continually increasing livestock numbers will jeopardise the achievement of the sector attaining climate neutrality by 2050. Therefore it is proposed that detailed plans to manage the sustainable environmental footprint of the dairy and the beef sectors will be produced by Q2 2022. This will take into account their respective environmental footprints; the plans for reduction in total methane, nitrous oxide and ammonia emissions; the impact of management practices and existing technologies at farm level. It will also take account of, emerging methane and ammonia mitigation technologies; the promotion of better pasture management, including reducing chemical fertiliser use; increasing clover and multi-species pasture swards; genetics and feed additives.

Carbon-farming offers a potentially new source of income for farmers but it is still in the early stages of development. The Ag Climatise Roadmap proposes

a pilot scheme for on-farm carbon trading to reward farmers for the public goods they are providing. This should align with the proposed EU Carbon Farming Initiative as set out in the Farm to Fork (F2F) Strategy, whereby a new regulatory framework for certifying carbon removals will underpin a payment to farmers. In addition to public funding, multiple sources of finance will be required, including from the private sector.

The Strategy proposes the scale-up of renewable energy (RE) sources, especially anaerobic digestion, solar PV, supply of biomass materials and energy efficiency. The roll-out in 2021 of an enabling framework for micro-generation which tackles existing barriers and establishes suitable supports, as foreseen in the Climate Action Plan 2019, will be crucial to the delivery of this action.

The Strategy proposes more targeted agri-environmental schemes under the next CAP Strategic Plan to protect Ireland's habitats and species. These schemes should include results-based actions, including payments for specific measures, drawing on the lessons from the European Innovation Partnerships. Consideration should be given to the development of a dedicated programme for High Nature Value (HNV) farmland and to researching the concept of 'Regenerative Agriculture', particularly under Irish conditions, with an emphasis on improving the health and multifunctionality of soils.

The Strategy also makes other recommendations across biodiversity, water, seafood and forestry. These include a commitment that Ireland will play an active and constructive role in the development of measures to realise the objectives for pesticide use reduction in the EU Biodiversity Strategy 2030 and the Farm to Fork Strategy; the development of a National Soils Strategy that will assess all appropriate soil health parameters and inform future policies on good soil management practices; conducting biodiversity studies to inform future policy development and measure progress; conducting a national land use review and the development of a 50-year vision on sustainable land use, land cover and land management including farmland, forests and peatlands; the development of a new Forestry Strategy; an examination of the option of afforestation on state owned lands, building on initiatives from Coillte and Bord na Mona. Actions are proposed to develop an all-of-value National Food Waste Prevention Roadmap with clear national and sectoral targets for 2030.

There is scope for additional income and employment opportunities arising from embedding the agri-food sector in the circular bioeconomy. These opportunities can come from the use of raw materials from grassland, crops, forestry and bio-marine systems to develop new bio-based value chains and this Mission expands on some of these opportunities.

Systems of food production, processing, packaging, distribution and logistics that contribute to environmental degradation are no longer ethically acceptable to society or consumers. An increasing number of global brands, some of which are customers of Irish food and drink, are placing their sustainability credentials front and centre as the next source of competitive advantage. Ireland has built a strong reputation for sustainable food by having the world's only national food and drink sustainability programme - Origin Green. The Strategy signals that Origin Green now needs to adapt to a higher level of environmental ambition and to achieve 'stretch targets' with participants. The Mission proposes that collaboration between agencies such as Bord Bia and Teagasc intensify to support the reduction of agricultural emissions, drawing on the respective strengths of both agencies to reduce the negative environmental impact of agricultural production and assure Ireland's reputation as a source of sustainable food production. A key element to the partnership will be promoting a coordinated approach to communications on sustainability to support farmers reduce their on-farm emissions, and the roll out of the Teagasc SignPost Farms programme will be an important element in this. Other actors – knowledge exchange practitioners, research institutions, State Agencies and NGOs – will also need to collaborate on ways to realise our environmental ambitions.



The range of agri-environmental measures proposed in the Strategy represent a statement on the important role the agri-food sector can play in living up to expectations on the environmental commitments. The Strategy envisages a pathway through which primary producers can assume a broader role in responding to the climate and biodiversity emergency, not only producing nutritious high quality food, but also becoming providers of a range of eco-system services, for which they will be financially rewarded based on delivery. It is hoped that the vision and commitments in the Strategy will enable farming, seafood, forestry and environmental groups to see a commonality of interests and provide a basis to work together on an agreed agenda for the future.

## MISSION 2: VIALE AND RESILIENT PRIMARY PRODUCERS WITH ENHANCED WELL-BEING

Mission 2 focuses on the areas which offer the best tools for improving economic viability and resilience of primary producers; both by their own actions and initiatives within the agri-food sector as a whole. Farmers can bolster their financial and economic sustainability by focusing on efficiencies; embracing new, diversified systems of agriculture; meeting standards required for greater premiumisation that can offer higher market returns; and being rewarded for the delivery of a range of eco-system services.

A common theme across the Missions is the need to work towards a more resilient and diversified system, capable of coping with the risks associated with changes in economic and climatic circumstances. While grass-based production of milk, beef and sheep will continue to account for the dominant part of agri-food output, the Strategy proposes there should be better integration within the sector, including dairy/beef and dairy/tillage linkages. The Strategy proposes expansion in tillage, horticulture, organic farming and agro-forestry, as well as a plan to reduce Ireland's dependence on imported protein crops. This Mission also envisages there being a place in Ireland's agri-food sector for all types of primary producer, whether full time or part time, big or small. A diversity of farming, fishing and forestry systems offers the best approach towards achieving all forms of sustainability and one should not be considered better than the others.

### ***A more equitable distribution of value in the food system***

Improving price transparency is one method of possibly improving returns to primary producers. The Unfair Trading Practices Regulations 2021, which come into effect from July 2021, apply to agreements for the supply of agricultural and food products, and prohibit certain unfair trading practices as set out in the Unfair Trading Practices Directive. Primary legislation, to be introduced before the end of 2021, will establish a new office of the National Food Ombudsman or regulator, with additional responsibilities. There is a relatively low uptake of Producer Organisations and use of Geographical Indicators in Ireland, and the Strategy proposes actions to support these initiatives. In addition, quality assurance schemes and new forms of producer-processor contracts have potential to improve value creation and distribution in the supply chain and the Strategy outlines actions relating to these.

### ***Broadening income sources within a more diversified and resilient sector***

The Strategy outlines likely additional on-farm and off-farm income sources to support farm household viability. Future income sources could range from the market for food products, to payment for carbon sequestration and storage, microgeneration of energy, protecting habitats and species, and providing other ecosystem services. While afforestation is

experiencing some challenges currently, it offers an added income stream for farmers, along with other options such as organic farming, horticultural production, contract rearing of livestock, eco-tourism, amongst others. Fishers can continue on a path of sustainable economic development by managing the utilisation of sea-fisheries. Building sustainable aquaculture enterprises, and expanding and investing in technology to develop the processing industry and improve productivity are also key objectives.

Ireland's new rural development policy "Our Rural Future" will also be an important factor in determining the range of income and employment opportunities for farm households and the wider rural community. This plan will address key policy challenges and offer solutions on issues affecting rural areas, including the crucially important issue of broadband availability.

### ***An enhanced focus on social sustainability and well-being***

Social sustainability is also a major focus of this Mission. There is a direct connection between the social vibrancy of rural and coastal communities, the commercial and environmental performance of primary producers, and those connected in upstream and downstream activities, particularly the food and drink industry. There are a multitude of factors that could be considered as influencing and driving social sustainability, but this Strategy has focused on a



number of key ones which are highly relevant to the agri-food sector.

Recommendations are made on how to improve measurement and reporting of social sustainability. Generational renewal and the importance of encouraging and facilitating new entrants to farming, fishing and forestry are highlighted. The Strategy supports an enhanced role for women in the sector and recommends the establishment of female farmers' networks and other supports to better understand and meet the needs of Irish women farmers, fishers and rural female entrepreneurs. The Strategy calls for continuous updating of education and training programmes to meet the changing needs of the sector and emphasises the importance of lifelong and peer-to-peer learning.

The number of injuries and accidental deaths in farming and fishing is unacceptable and there must be greater emphasis on occupational safety. The Strategy proposes the introduction of mandatory health and safety skills training for all those working on farms and enhanced training for fishers. There are continuing problems of rural isolation and there needs to be greater focus on mental health and well-being. The COVID-19 crisis has shown many examples of community solidarity but as Irish rural society emerges from this crisis, more systematic attention needs to be paid to the underlying challenges of rural isolation

and mental health, which the Strategy also attempts to address. Associated with this is the need for LGBTI+ inclusivity, strong rural development policies and new community engagement initiatives, as well as the rapid roll out of high-speed rural broadband.



## MISSION 3: FOOD WHICH IS SAFE, NUTRITIOUS AND APPEALING, TRUSTED AND VALUED AT HOME AND ABROAD

Food security and nutrition is a key component of Sustainable Food Systems, particularly the link between food and health. It is important that the sector contributes to ensuring coherent food and health policies that deliver improved health outcomes and this is a key focus of this Mission. The Strategy acknowledges that there is a need for a wider public discussion on the role of food in society. Part of this discussion should be the price people are willing to pay for food produced to high standards, as well as the relative affordability of nutritious foods compared to less healthy choices. There is increasing demand for natural, sustainably produced food and a strong growth in the sales of milk and meat alternatives, based on consumer demand for vegan or 'flexitarian' choices and recognition of the importance of fruit and vegetables in a healthy diet. There is also a lively debate, nationally and internationally, about the role of animal-sourced foods in diets. The Strategy contributes to this debate, with a statement on the value of animal-sourced foods in diets for children, adolescents and adults.

Consumers expect that the food and drink they purchase is safe, traceable and authentic, produced, processed and sold in a transparent, ethical manner. Ireland's agri-food sector has a duty to meet these standards and expectations and while working off a strong base, has to evolve to keep up with rising

demands in these areas. The Mission contains actions to ensure the continued supply of food and drink that meets these rising expectations both at home and in international markets. For example, a new National Action Plan for Antimicrobial Resistance, using a One Health approach, will be developed, and implementation of the new National Animal Welfare Strategy, which uses a One Health One Welfare approach, will be pursued.

OECD/FAO projections suggest that the long-term trend of stable or a slight reduction in the real price of food will continue over the next decade. The Strategy takes the position that being able to demonstrate that Ireland has high standards of sustainability offers the best approach for seeking a price premium and/or enhanced market share. It suggests that the customers of Ireland's food and drink (retailers, the food service sector and consumers) should play their part in helping the sector become more sustainable. Insight, innovation and product differentiation and developing opportunities at home and abroad are further important elements in adding value and this Mission sets out actions to advance these.

Arising from Brexit, the UK is likely to open up its market for food through a set of new trade agreements which could impact on UK price levels, particularly during the second half of the decade. This Strategy envisages Irish agri-food protecting and building on its

strong position within the British market for key food and drink exports, while recognising that the market is likely to become more competitive. The long-term policy of increasing trade diversification will continue, but the unique importance of the UK market for the Irish agri-food sector will remain. Building on Ireland's reputation for providing safe, sustainable, and high-quality food will be key to maintaining a strong market position in the UK.



## MISSION 4: AN INNOVATIVE, COMPETITIVE AND RESILIENT AGRI-FOOD SECTOR, DRIVEN BY TECHNOLOGY AND TALENT

Innovation is fundamental to achieving sustainability in all its forms. Ireland's agri-food sector has been making good progress in embracing technology and innovation in recent years. In the period to 2030, a wide range of new digital innovations and data capture and analysis techniques will emerge. These will change the way we manage our natural assets; produce, process and distribute food and its by-products and residues; and improve transparency along the food chain. The sector stands on the cusp of being able to utilise these technologies, data and innovation to enable the new sustainability improvements that are required and to capture and share their impact.

A review that was conducted as part of Food Wise 2025 into the innovation capacity in the agri-food sector concluded that whilst the level of knowledge creation is significant, the level of collaboration is inadequate, both within and between the public and private sectors, and that there is too little focus on the end user or consumer, and on measurable outputs. The review recommended that innovation must go further than product and process innovation, and that a new approach is needed that is output-based and mission-orientated. Mission 4 thus recommends a new approach to innovation by moving to a challenge-focused agri-food innovation system that will deliver increased cohesion of public and private actors and deliver on the vision of Ireland as a global leader

of innovation for sustainable food and agriculture systems.

This Mission also recommends a more strategic approach to R&D funding and calls out the need for greater private sector spend on R&D, new forms of knowledge exchange that sees end-users such as farmers playing a more active role and embracing peer-to-peer learning and a more dynamic knowledge exchange environment, with a focus on translating research findings and innovations to practical implementation on farms and in agri-food and seafood businesses.

Mission 4 also makes a number of recommendations in order to more fully embrace the digital revolution that is taking place in agriculture, food, fisheries and forestry. This is a really exciting area and while there are great examples of ag-tech centres and businesses, the Strategy has concluded that it is still at a relatively early stage of development.

The Strategy also makes recommendations in the areas of competitiveness and resilience, including greater up-take of industry supports, improved access to affordable finance, and support for enabling technologies such as biorefining, advanced manufacturing and digitalisation, plant renewal and expansion, refinancing, and market development. In addition, the Mission focuses on the crucially important enabler of attracting and nurturing diverse



and inclusive talent. The nature of many of the roles in the sector is likely to change quite substantially in the period to 2030, as will the career preferences of young people. The Mission calls on employers to develop education, skills and talent attraction and retention strategies, while also proposing measures to deal with labour shortages, reviewing education and training programmes, as well as a series of actions to promote and improve gender balance, while also rolling out initiatives to improve diversity and inclusion.

Finally, this Mission can be considered 'enabling' in that its Goals and actions are of such a cross-cutting nature that they will be critical to facilitating the delivery of other Missions and Goals in the Strategy.

# COMMUNICATING THE STRATEGY'S VISION

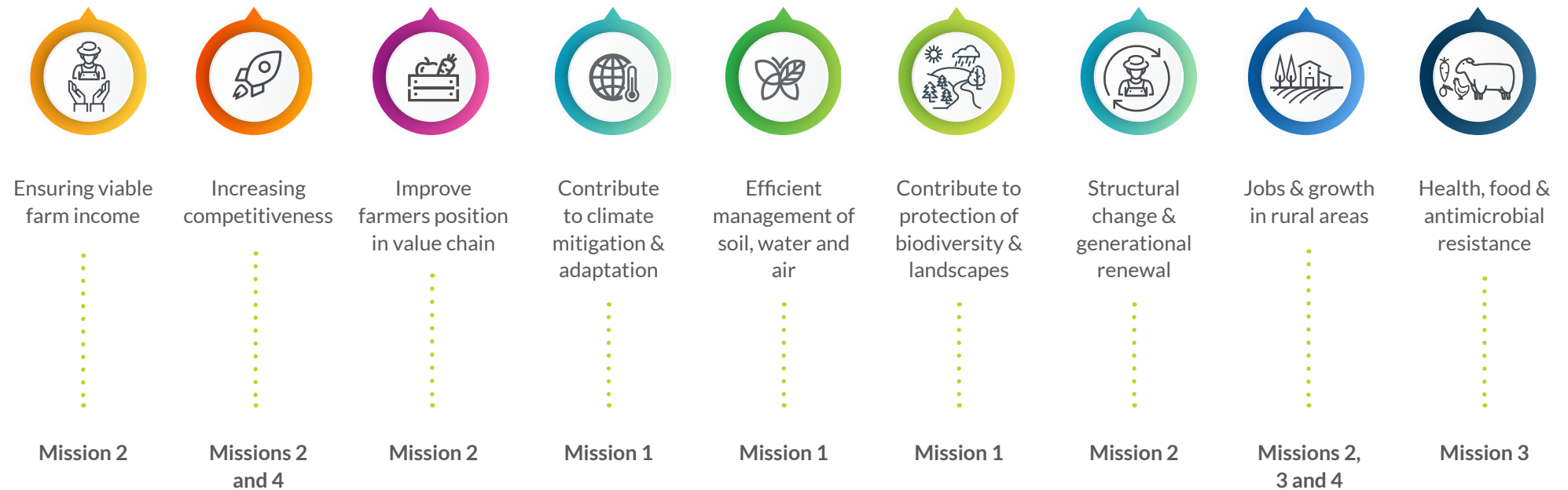
The Strategy's primary role is to provide a vision and associated policies for the sector for the coming decade. But it also has an important role in communicating an Irish vision and commitments to key audiences at EU, UK and international level, and to the major customers for Irish food and drink. Ireland should seek to carve out a thought, policy and practice leadership role, at European and international level,

for a number of issues where it has the credibility and capability to play such a role.

Over the past decades the EU's CAP has been a major source of income support and has evolved to broaden its scope to food safety, rural development, and animal welfare. The new stage in the CAP's evolution will have noticeably higher environmental ambition with national Strategic Plans focusing on economic, environmental and social goals across nine key objectives. The Strategy aligns very well with these nine objectives, as demonstrated in the figure below.

There are clearly synergies between both processes and it is likely that many elements of the new CAP will contribute to the implementation of actions contained in this Strategy. Notably, the new CAP will contain new green architecture, featuring strengthened mandatory requirements and increased funding opportunities for green farming. In particular, a new stream of funding from the CAP's direct payments budget for "eco-schemes" will be introduced, which will support and incentivise farmers to undertake agricultural practices beneficial for the climate, biodiversity, and the environment.

## CAP OBJECTIVES & STRATEGY MISSIONS



The sector can be part of the agenda for deepening the bilateral relationship between Ireland and the UK in the post-Brexit era: the nature of that engagement should be explored in the light of this Strategy and the outcomes of the review of UK food policy currently underway and expected to be completed during 2021. The special status of Northern Ireland, resulting from the Ireland/Northern Ireland Protocol of the UK/EU Withdrawal Agreement, offers a number of possibilities for increased cooperation and exchange of best-practice on an All-Island basis. There could also be scope for additional novel forms of collaboration, involving the UK and Irish governments and the EU, on some of the EU's Moonshot Missions such as soil health and food.

## IMPLEMENTATION AND OVERSIGHT

The success of this Strategy will depend on effective implementation and oversight. For this reason, a Monitoring and Implementation Framework is included. This highlights areas for collaboration and partnership within the sector but also with key external stakeholders. It also details oversight and monitoring mechanisms for implementation, including the establishment of a High Level Implementation Committee chaired by the Minister for Agriculture, Food and the Marine, and its key task will be to ensure the delivery of the four Missions. Specific monitoring requirements for environmental aspects are laid out, including the establishment of an Environmental Working Group. This Group will enable the environmental performance of the Strategy to be monitored and evaluated and allow any negative

trends to be identified early and remedial action and responsibilities to be determined. It will also provide for increased transparency during implementation. A more detailed plan with the actions and their owners, deliverables and timeline for implementation is published separately, as is the Strategic Environmental Assessment (SEA) and Appropriate Assessment (AA).





## GOALS AND INDICATORS

The vision of this Strategy is for Ireland to be a world leader in Sustainable Food Systems. This Strategy outlines four missions and twenty-two goals, which if achieved, will position Ireland as a world leader in Sustainable Food Systems. It includes some 200 actions to achieve these goals and missions, and alignment between the goals and relevant SDGs has been indicated throughout the Strategy. As well as monitoring the implementation of these actions, the High-Level Implementation Committee for the Strategy, will consider and review the performance of the agri-food sector according to an agreed set of indicators.

While the Strategy provides the vision and missions to facilitate a transformation to a sustainable food system, it should not be seen as a final or definitive roadmap. It is a framework within which more detailed plans and processes will need to be developed. National and international policy developments will also be important and the Strategy should be seen in that context, as the beginning of the pathway to the vision of a more sustainable food system.

As yet there is no internationally agreed set of indicators for Sustainable Food Systems, although these may emerge in the future. The Committee has therefore identified the goals associated with each Mission, as well as the key indicators which will be used to track progress. The Committee has also outlined what progress by 2030 will look like.

# MISSION 1

## A CLIMATE SMART, ENVIRONMENTALLY SUSTAINABLE AGRI-FOOD SECTOR

**Goal:** A Climate-neutral food system by 2050, with verifiable progress achieved by 2030, encompassing emissions reductions, carbon sequestration, air, biodiversity and water quality.

### Key indicators:

- Biogenic methane level
- Ammonia and Nitrous Oxide emissions
- Water quality
- Biodiversity – land and sea
- Afforestation level
- Level of organic farming
- Food Waste statistics
- Enhanced Origin Green Programme

## PROGRESS BY 2030

The Committee acknowledges that in general, future environmental targets are likely to be set by legislation and commits to participating in the various target-setting processes with a view to the ultimate commitment to be climate neutral by 2050.

**Biogenic methane:** The Strategy commits to a reduction of at least 10% by 2030 (on 2018 level), recognising that this will need to adjust in line with emerging national and international targets for the sector and in line with the development of scientific solutions.

The target for biogenic methane will be updated when specific sectoral targets are agreed under the framework of the Climate Action and Low Carbon Development (Amendment) Bill 2021.

**Nitrous Oxide:** Emissions associated with chemical fertiliser use to reduce by more than 50% by 2030

**Water Quality:** The Strategy commits to reduce nutrient losses from agriculture to water by 50% by 2030

**Biodiversity:** It is envisaged that by 2030, 10% of farmed area will be prioritised for biodiversity, spread across all farms throughout the country

**Air Quality:** Ammonia emissions to reduce to 5% below 2005 levels by 2030

**Forestry:** Increase afforestation from existing levels to at least 8,000 ha per year and double the sustainable production of biomass from forests to 2 million tonnes by 2035

**Organic farming:** At least 7.5% of utilisable agricultural area is targeted to be farmed organically by 2030

**Seafood:** Achieve 30% of marine protected areas by 2030

**Food Waste:** The Strategy aims to halve the level of food waste per person by 2030

**Origin Green Programme:** Achieve a high participation rate by both primary producers and the food industry in an enhanced Origin Green programme,

*Note: Ag Climatise has already set additional targets relating to chemical nitrogen use, abatement through LULUCF, the management of peat soils, genotyping, milk recording, slurry application, slurry stores, protected fertilisers and renewable energy.*





## MISSION 2

### VIABLE AND RESILIENT PRIMARY PRODUCERS WITH ENHANCED WELLBEING

**Goal:** Competitive, productive primary producers with improved economic and social sustainability.

**Key indicators:**

- Family Farm Income (Family Farm Income per hectare)
- Economic Sustainability of farm business
- Economic return to land (Gross output per hectare) and Profitability (Market-based gross margin per hectare)
- Economic performance of the Seafood sector (as reported by BIM 'The Business of Seafood')
- Total primary output and output by sector
- Formal agricultural education
- Age Profile
- Number of new entrants
- Number of farm families
- Isolation risk
- Health and Safety statistics
- Market transparency

## PROGRESS BY 2030

The Strategy is ambitious for primary producers, envisaging an upward trend in Family Farm Income towards 2030, with an increased share of viable and sustainable farms, reflecting improved economic returns to land and profitability per hectare, an upward trend in primary output value with increased diversification across sectors. The Strategy also foresees the seafood sector continuing on a path of sustainable economic and environmental development by carefully managing the utilisation of sea-fisheries and aquaculture.

The Strategy aims to improve the social sustainability of primary producers, increasing the share of younger and trained farmers and fishers, reducing the risk of social isolation, and ensuring a much improved record on health and safety.





## MISSION 3

### FOOD WHICH IS SAFE, NUTRITIOUS AND APPEALING, TRUSTED AND VALUED AT HOME AND ABROAD

**Goal:** Coherence of policies for food, health and nutrition; Enhancement of consumer trust through providing evidence of safe and ethical food production; Creation of value-add, through insight and innovation, supporting the food sector and continuing to develop market opportunities at home and abroad.

#### Key indicators:

- Development of coherent national and international food, health and nutrition initiatives
- Enhanced food safety, animal health and welfare
- Value and value-added in the agri-food sector
- Value of agri-food exports

#### PROGRESS BY 2030

The Strategy aims for an integrated food systems approach to food and health policy.

Continued world-class standards in food safety, animal health and welfare.

Increased value-addition, and an increase in the value of agri-food exports to €21billion by 2030, built on sustainable steady value growth.



## MISSION 4

### AN INNOVATIVE, COMPETITIVE AND RESILIENT AGRI-FOOD SECTOR, DRIVEN BY TECHNOLOGY AND TALENT

**Goal:** An innovation, knowledge and technology driven sector; with improved competitiveness and resilience along the food chain; and the attraction and nurturing of diverse talent.

#### Key indicators:

- Level of implementation of the recommendations of the High-Level Innovation Team
- Level of private R&D
- Availability of public policy supports, including R&D, access to finance and on competitiveness issues specific to the agri-food sector.
- Development and implementation of a strategy for the agri-food sector on education, skills and talent attraction and retention.
- Promotion of food and nutrition security, and SFSs, as an important part of delivering on Ireland's ambition of achieving the UN aid target of 0.7% of GNI by 2030

## PROGRESS BY 2030

The Strategy envisages a more output-focused collaborative innovation system by 2030; with private R&D to reach 1% of turnover; The agri-food sector should be more competitive resilient, and seen as attractive by a young, diverse and talented workforce.

Ireland will advocate for Sustainable Food Systems internationally and for the development of a recognised SFS measurement or index to supplement and strengthen its vision for 2030.

Ireland's advocacy that SFSs are an important part of the deepening strategic relationship between Africa and the EU, and within Ireland's overall relationship with Africa.







MIX  
Paper from  
responsible sources  
FSC® C125613



Rialtas na hÉireann  
Government of Ireland