Irish Tillage Sector

Structure, Challenges and opportunities

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Average income by system - per farm

Source: Teagasc, National Farm Survey
Size of sector

• Tillage sector approx. 9% of farmed land
  • Area deceasing by 14.3% over past 5 years
  • Approx. 3,000 specialised tillage farmers

• Produces between 2.2-2.5 Mt per annum
  • Predominately animal feed but also malting/brewing, food grade oats & oils, some milling wheat

• High input high output sector
  • Highest yields in the world
  • Land rental/lease approx. 50% of area
Total area under cereals, proteins, oilseeds (1986-2016)

Source: CSO

The Irish Agriculture and Food Development Authority
Difference in area (ha) 2007-2016

Source DAFM. Note: Cereals, proteins, oilseeds
Irish Feed Grains Annual Usage

Grain & Feed Ingredient Availability

- Native Cereal Production
- Cereals Imports
- Maize & Sorghum Imports
- Non Grain Imports

The Irish Agriculture and Food Development Authority
World grains production is forecast to be the second largest in history in 2017/18

Source: IGC, Sept 2017
Harvest current status (Oct 2017)

- Yields relatively good but not exceptional
- Cereal harvest almost complete (<5% left)
  - Significant areas left in Donegal, West and midland
  - Trafficability and crop breakdown an issue
- 30% of Beans left to harvest
- 20% of straw nationally still to be bailed
  - Increased straw price with some quality issues
Opportunities

• Increasingly identify and supply premium markets
  • Ideal where “Irish only” is needed
• Increasing production in the drink sector
  • Distilling
  • Craft beers
• Markets looking for GM free products
• Human food grade markets
  • Oats and cold pressed oils
• Chipping and salad potatoes
• Certified seed crops (cereals, oilseeds and potatoes)
Future Crops

• Organics
  • Niche area but a market for some crops
  • When price pressure sold at similar prices to conventional

• GM crops
  • Imported GM products continued to be feed to animals
  • No GM crops grown in Ireland
  • Consumer demands now include “GM free” produce
  • Dairy industry will increase its demand for GM free feed stuffs
Teagasc Programmes

- Research targeting
  - Yield and sustainability of cereal crops
  - Alternative crops for import substitution and higher value markets e.g. beans, oilseeds and oats
  - Developing higher value end uses for cereals e.g. wheat for distilling and baking (cakes and biscuits)
  - Develop better varieties – molecular approaches
- Knowledge Transfer
  - Increase adoption of best technology
  - Targeted programmes with Industry
    - Malting barley, potatoes
- Education
  - Up skilling young farmers with latest knowledge
Develop the role of new technologies

• Marker assisted and genomic selection now being used to increase the rate of varietal improvement

• Novel technology of gene editing will significantly increase the rate further

• The role of GIS technology being investigated
  • Focus on field variability to improve average yields
  • Increase precision application of nutrients (N, P and K)
  • Handheld devices to detect unseen diseases to better target a response
Potential for Bio-economy

• Industry is stagnant
  • Reluctance to invest or plant new areas
  • Will require long term commitment to market support

• Without support
  • Industry will continue to stagnate
  • Lack of investment
  • Large EU fines looming
  • RHI – details coming soon
    • Straw should be a recognised feed stock

• Bio-economy strategy needed
  • Bio-polymers, platform bio-chemicals, insulation materials
  • Downstream heat supply, etc.
Thank You