

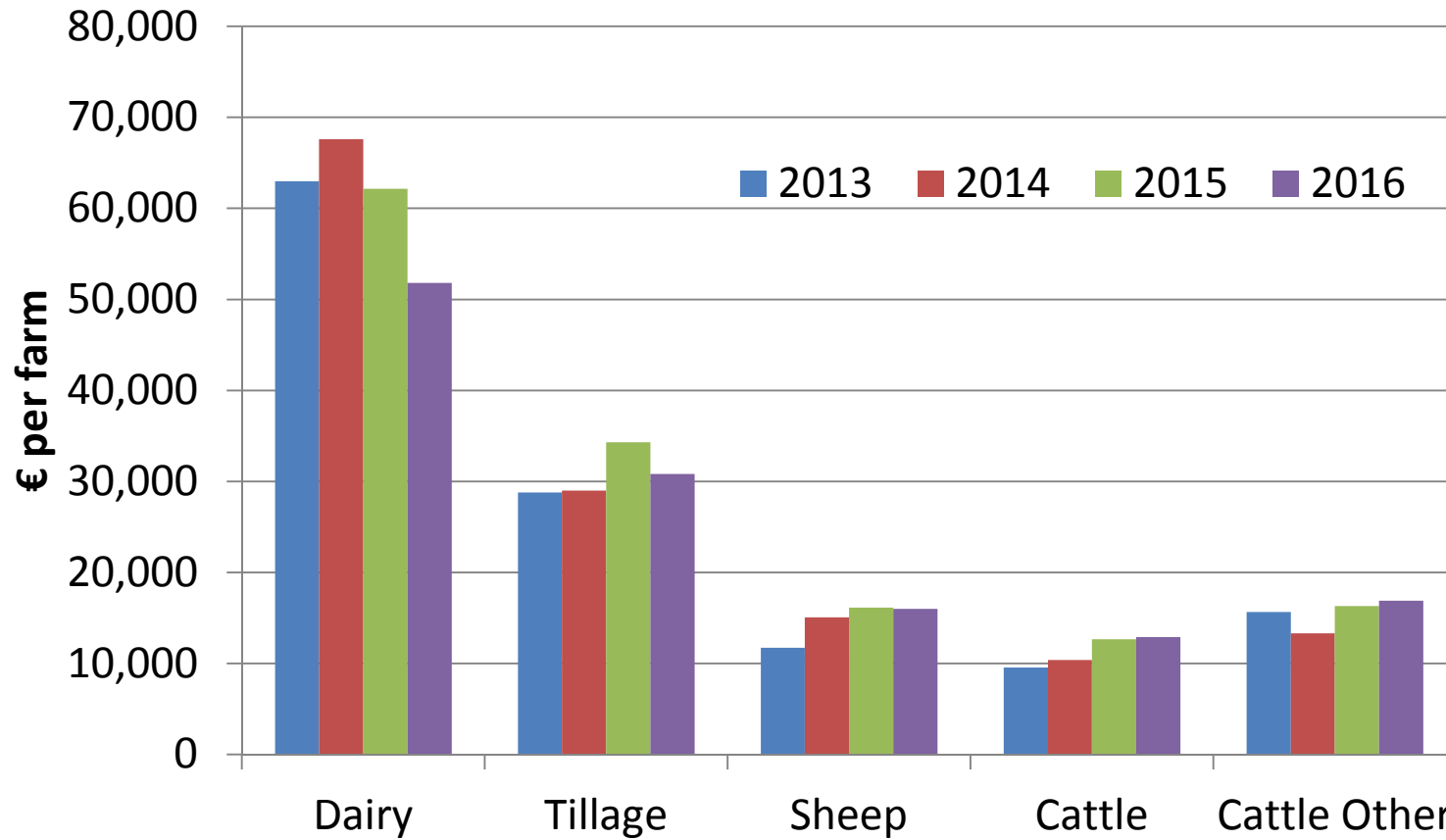
Irish Tillage Sector

Structure, Challenges and opportunities



Professor Gerry Boyle, Director, Teagasc.
John Spink, Head of Crops Research
Michael Hennessy, Head of Crops Knowledge Transfer

Average income by system - per farm

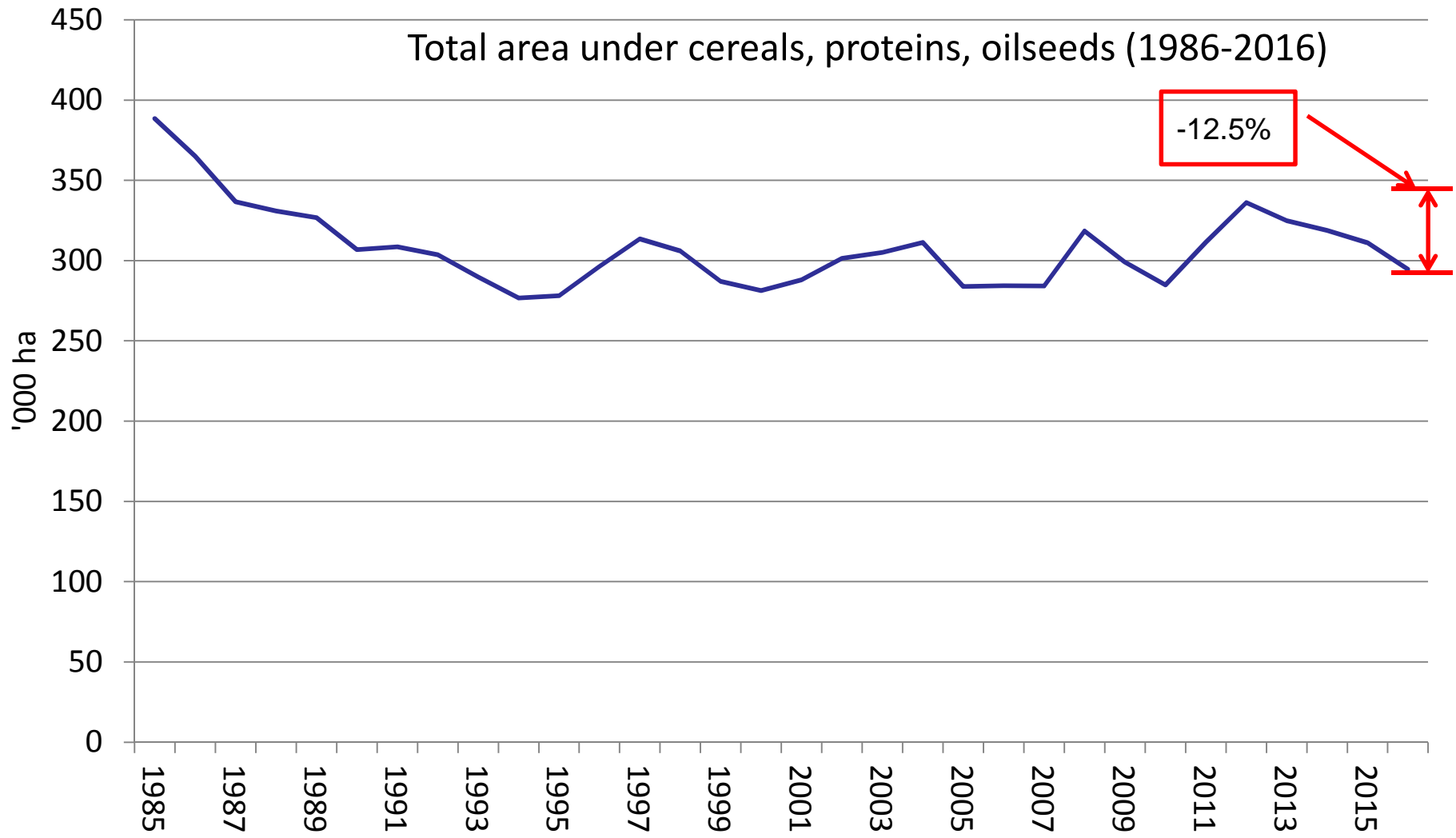


Source: Teagasc, National Farm Survey

Size of sector

- Tillage sector approx. 9% of farmed land
 - Area decreasing 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



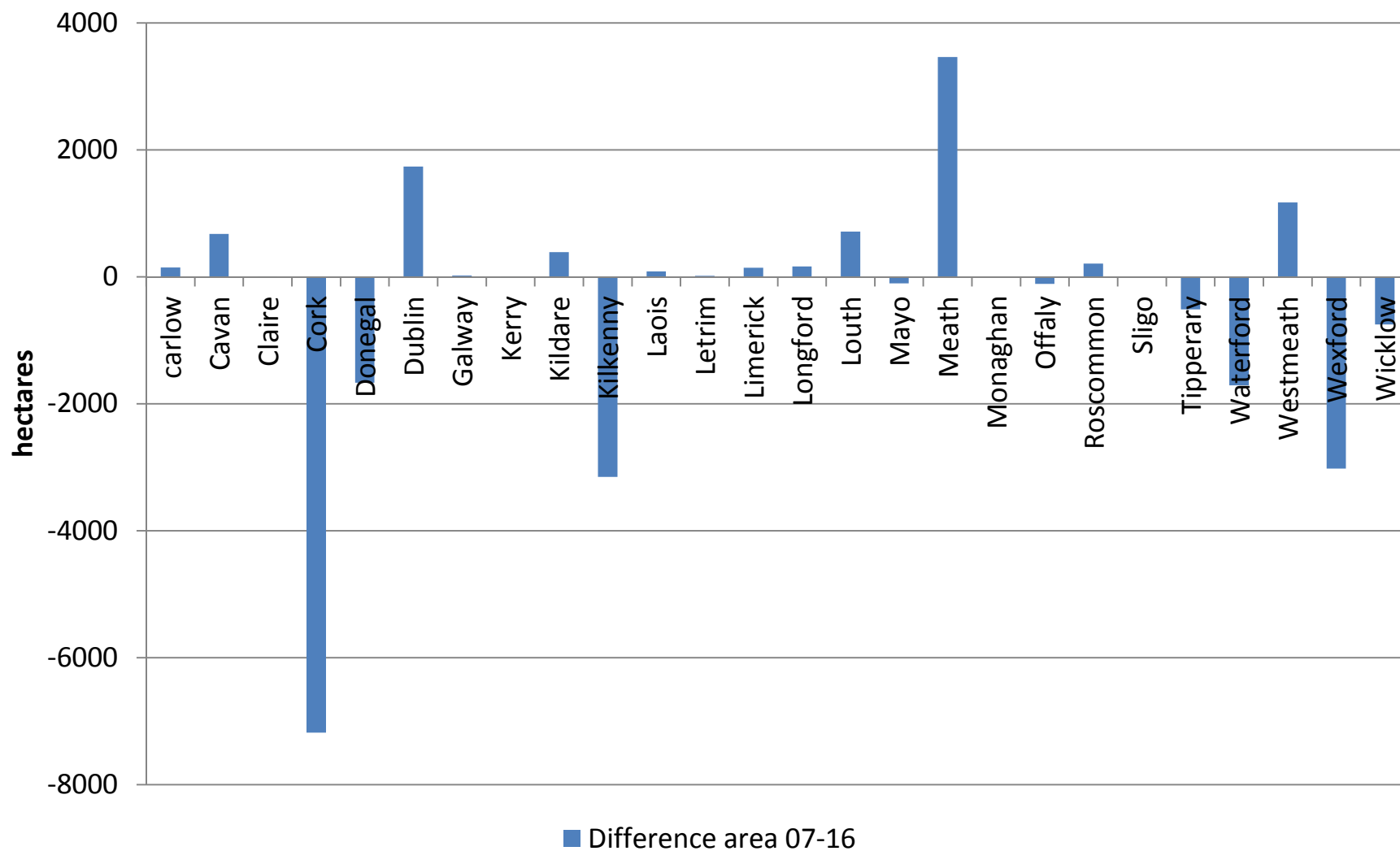


Source: CSO



The Irish Agriculture and Food Development Authority

Difference in area (ha) 2007-2016

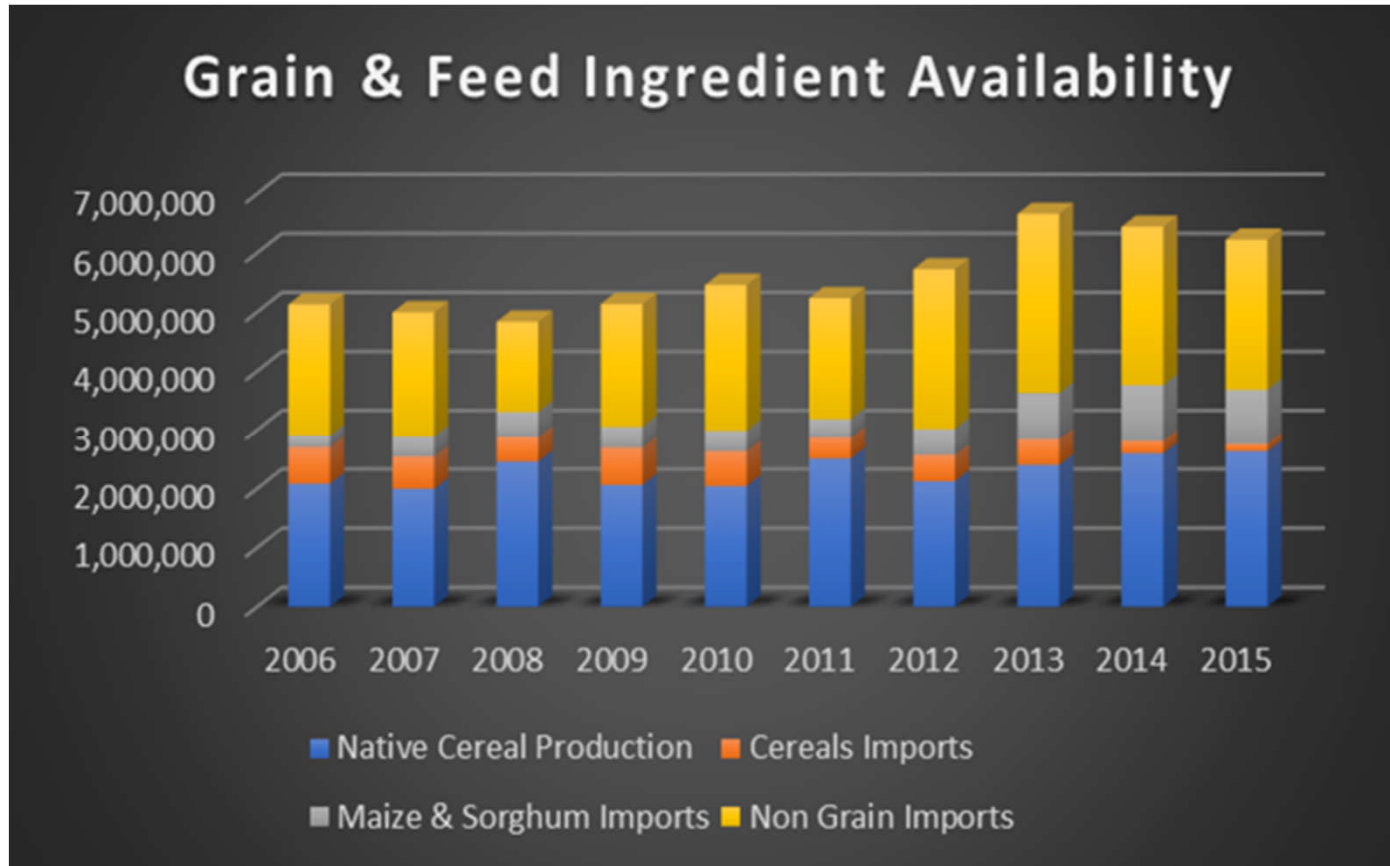


Source DAFM. Note: Cereals, proteins, oilseeds

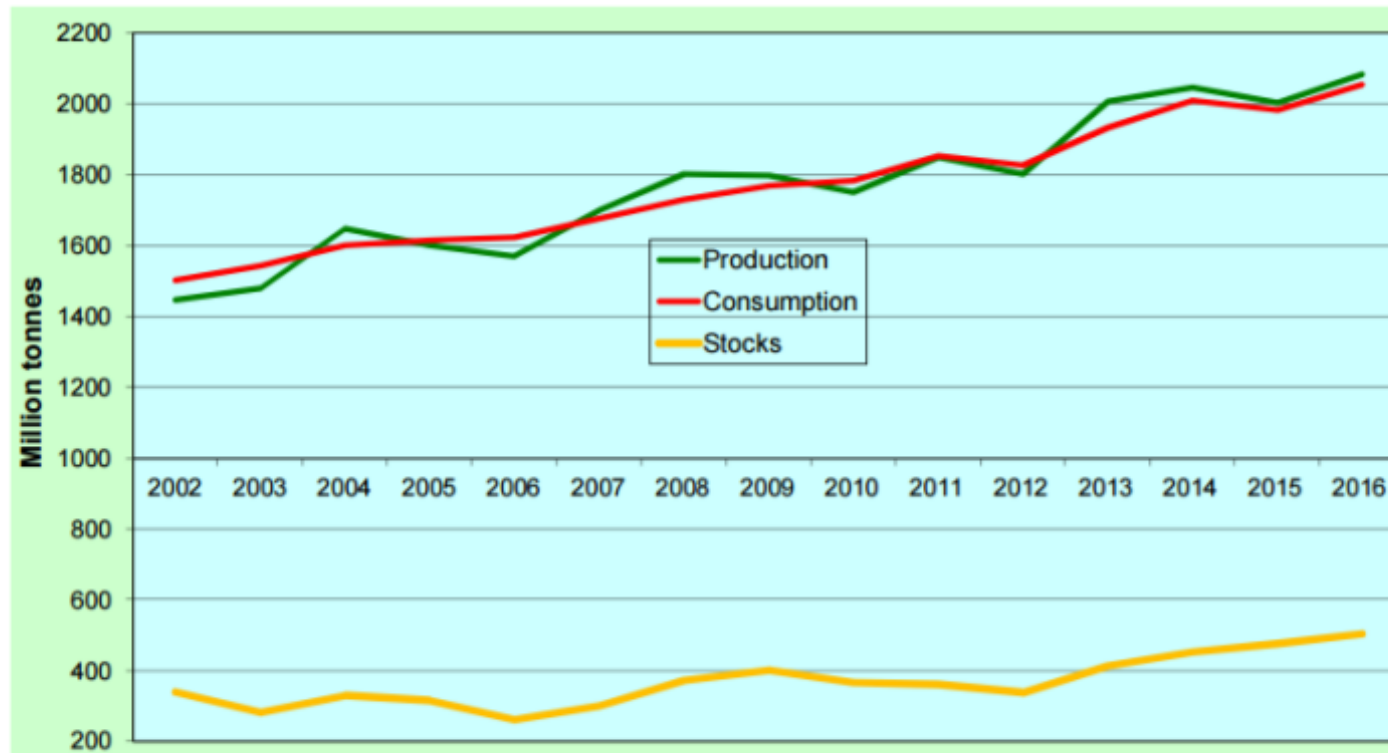


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Irish Feed Grains Annual Usage



World grain supply/demand/ Stocks

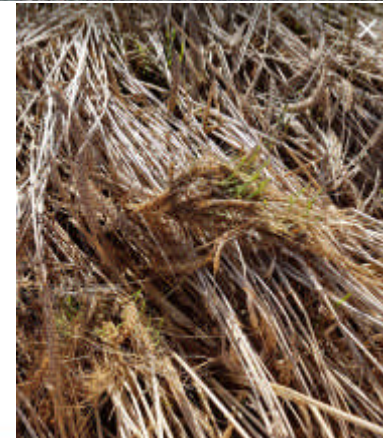


World grains production is forecast to be the second largest in history in 2017/18

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

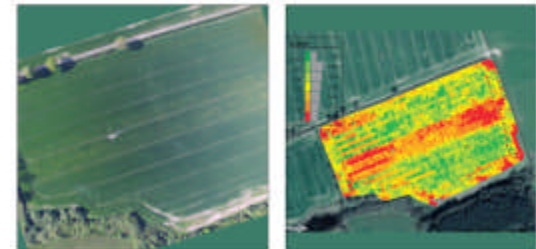


Research



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



The Irish Agriculture and Food Development Authority