

2020 Strategy Process

**Kevin Smyth - Chief
Economist**

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Department of
**Agriculture,
Fisheries and Food**

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2020 Strategy Report

How do we develop a Vision for these
changing times?



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Context

- Deepest Recession since 1929
- World Economy expected to recover in 2010. Ireland will lag
- Future demand linked to projected world population and demand increase
- OECD/FAO agricultural outlook is demand positive but supply negative
- Expected to do more with less

Current Change Drivers

- Crucial policy debate on CAP and EU budget 2013-2020
- Major opportunities, challenges and uncertainties in global and EU markets
- Climate change and other environmental challenges
- Institutional change – public and private sector
- National economic renewal – role of the Department and State Agencies

The Role of the State

- AgriVision 2010 & 2015 national strategies gave new vision/direction for agri-food sector
- These Reports lead to major policy changes and a sense of direction in Government Policy and Social Partnership
- Food industry refocused from commodity/subsidies to exports/value-added
- Annual turnover of food/drink sector increased from €15 to €25 billion in past decade



Belief in Planning - new focus for changed
Environment- more of the same not sufficient

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Roadmap

- Analyse current situation and outlook
- Actively involve State Agencies- use their expertise and differing perspectives
- Discussion Papers to inform wider consultative process
- Draft report
- Review by external expert committee

Current Status

- Over 20 groundwork papers completed by DAFF/SSB
- Amalgamate/sharpen this preparatory work into five agreed Discussion Papers
 - Context
 - Commodities
 - Food
 - R & D
 - Sustainability



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Significant input/direction required from
State Agencies, MAC, Ministers

Discussion Papers

Context

EU Policy

- CAP Post 2013
- Future structures-Decoupling, differing payment options, etc
- Funding Rebalancing
between MS
Pillar 1 - Pillar 2
- Rural Development



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Crisis Management

Context-continued

National Context

- Difficult fiscal and economic context
- Recession will not last for ever
- How position agri-food as part of export driven, smart economy

Commodities

- Papers on beef, dairy, cereals, horticulture, fish and forestry
 - *SWOT/PESTEL* analysis by sector
 - Current markets and future outlooks
 - Issues with possible actions e.g. 85% of fish is sold in commodity form; vulnerability of the PCF sector

Food *Sector (inc. Seafood)*

- Importance and evolution
- consumer, retail developments
- Challenges and opportunities
- Required actions on competitiveness, market development, retail concentration



Research and Bioeconomy

- **Present R & D Infrastructure and mechanisms on agriculture, food, marine and forestry**
- **Current success areas**
- **International trends – low national R&D Spend**
- **Future strategy options – climate change, energy, sustainability, animal health**

Environmental issues

- **Sustainability/food security/public health as affects food and agriculture**
- Climate Change/GHG
- EU Directives on soil, air water
- Mitigation strategies and future options
- Most critical and least well developed area



November- wider consultation

- Web based public consultation
- Garner international views,
- Industry expertise
- Assistance of other SSB's on specific issues, e.g. EPA
- Work needed on institutional response

Role of Teagasc

- Need to make use of your expertise
- Teagasc is already contributing
- Expertise in the areas of R&D and Education
- Papers on Baseline Analysis, Farm Numbers, Farm Level Analysis
- Any other offers of assistance are welcome!

December-January

- Develop action-focused strategy
- Too early in process for definitive views on content and way forward
- Expect major focus on
 - competitiveness,
 - sustainability including climate change,
 - change management

Thank you