



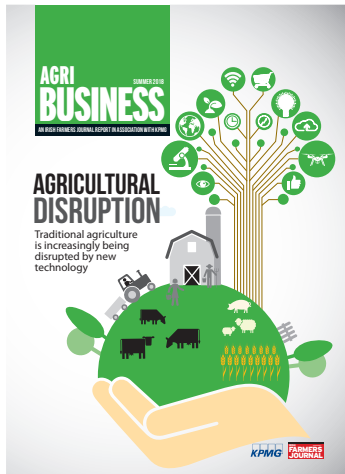
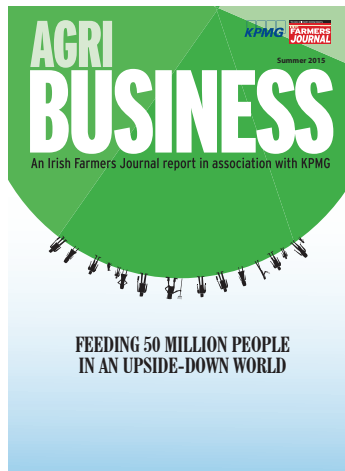
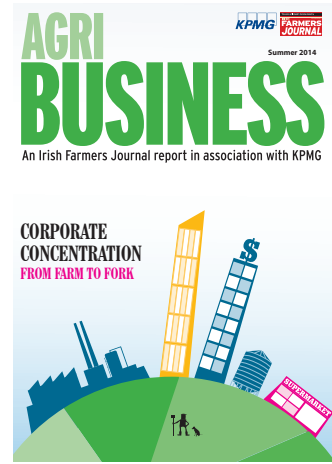
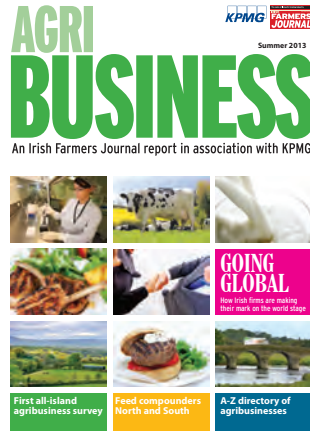
AGRI BUSINESS

WINTER 2022

AN IRISH FARMERS JOURNAL REPORT IN ASSOCIATION WITH KPMG



AGRICULTURE & THE RURAL ECONOMY



FOREWORD



**TOM
MCEVOY**

Partner and head of food and agribusiness, KPMG

The 2022 annual *Irish Farmers Journal-KPMG Agribusiness* report marks our 10th anniversary partnering with the *Irish Farmers Journal*.

In the 18 months since the publication of the last report, we have seen a return to a 'new-normal' society, post-pandemic, only for the world to be faced with significant geopolitical threats following the Russian invasion of Ukraine.

Global supply chains were already stretched, and the threatened shortage of oil and rocketing fuel prices has led to inflation levels not seen for decades. Many people, particularly in Europe, are faced with stark choices this winter – food versus fuel. Governments are being forced to take some drastic actions to ensure the most vulnerable in society can make it through the winter.

We also see political turmoil in our nearest neighbour that has had a severe impact on its economy. This is not good news for Irish exporters to the UK and with food and agriculture particularly dependent on that market, there are storm

clouds ahead for Irish agriculture.

In the last 18 months, we have also seen some of the most extreme weather events in recent times in Europe, from torrential rain and flooding to intense heat and wildfires. This has increased the awareness of the impact of global warming and intensified the calls for different sectors to pay towards the efforts to reduce the rise in temperatures.

Against the backdrop of the immense challenges facing businesses, we are witnessing a re-emergence of localisation with local rural agribusinesses positively contributing economic output and innovating to meet new challenges.

We discussed with the *Irish Farmers Journal* how to elevate the importance of these businesses and communities, selecting five rural towns across the island. Our KPMG Strategy team carried out research and generated the data that is the basis for this *Agribusiness* report – exploring what is the economic contribution of agriculture and related activities to rural Ireland and the overall Irish economy.

I believe this to be compelling reading.



**LORCAN
ROCHE KELLY**

Irish Farmers Journal
agribusiness editor

It has been another hugely challenging year for global food production. Just as the world was starting to recover from the logistics problems caused by the pandemic, Russia's unprovoked invasion of Ukraine led to rocketing fuel and fertiliser prices.

Policymakers and major corporations are starting to see the downside of the globalisation push of the past few decades.

In previous reports we have written at length about how Ireland's agriculture industry was facing the challenges of a flatter world, where trade barriers were falling.

Now, on the 10th anniversary of the *Irish Farmers Journal-KPMG Agribusiness* report, that global flattening seems to have gone into reverse. Governments are rushing to bring essential industries back

within their borders.

Whether it is silicone chips in the US, energy in the European Union or China's policy shift towards domestic consumption, the focus for policymakers is increasingly on what can be done at home.

Which is why this year's report is such an important document. Agriculture is without question Ireland's most important indigenous industry. When it comes to home advantage, it is Ireland's ace card.

In the following sections we present analysis of the contributions to the national economy from five key regional towns which are built on agriculture.

The report also highlights what supports the sector needs to face the challenges that are emerging in the global economy.

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ANALYSIS

‘IN THESE TOWNS THERE IS INDUSTRY BASED AROUND FARMING THAT AMOUNTS TO SEVERAL INTELS WORTH OF EMPLOYMENT AND WHOLE-NUMBER PERCENTAGE OF NATIONAL INCOME’

Economists looking at how much business countries do with each other developed a concept called the Gravity Model of International Trade. Fundamentally, the model says that the bigger countries are and the closer they are together, the more they trade with each other. The model shows there is overwhelming evidence that trade falls with distance.

While it is generally used to examine trade between nations, the gravity model can also be kept in mind when looking at trade within countries. A farmer is more likely to sell cattle to his local processor. People are more likely to work and shop close to where they live. Service industries will set up where there are sufficiently large anchor industries to serve.

This year’s *Irish Farmers Journal*/KPMG Agribusiness report can be viewed through that lens. The five towns we looked at – Ballyhaunis, Cavan, Charleville, Cookstown and Enniscorthy – show the gravity model at work with agriculture as the anchor industry.

It might seem obvious to say, but farms can’t move. The land is where the land is, so all the industry that is based on farming has to position itself so it is close to the land. That’s where our towns come in.

SYMBIOTIC RELATIONSHIP

They developed organically over generations serving the needs of the surrounding farms, eventually becoming part of the symbiotic relationship we see today where the farms need the towns every bit as much as the towns need the farms.

The success of this relationship may also be something of a disadvantage for the towns. Because so much of the trade that occurs happens between close neighbours – the gravity model – the effect for the wider economy across the island can be less visible.

This is where this report comes into play. The economic impact assessments for the five towns shows what a huge amount of value they add to the national economy. With national impacts running to the billions of euros and employment in the tens of thousands, any reader will be left



**LORCAN
ROCHE KELLY**

Irish Farmers Journal
agribusiness editor

in no doubt as to how critical this industry is. In this handful of towns alone there is industry based around farming that amounts to several Intels worth of employment and whole-number percentage of national income.

Looking beyond the numbers, there is plenty of qualitative data in the report. As part of the survey, respondents were asked what they saw as the biggest challenges facing agriculture and what policy supports they felt were key for continued success. Considering what 2022 has brought, it is no wonder that rising input costs were seen as the biggest challenge. This is closely related to the third-biggest, which is stagnant prices for farm products.

SOLUTION

The solution to these, should the spike in inputs prove transitory, is probably a round of Government supports for the hardest-hit sectors. The survey suggests that’s what respondents think too, with calls for improved CAP payments and extra tax allowances to take account of the uneven nature of farm incomes across years.

The second biggest challenge seen by survey respondents is one which they offer little in the line of solution for. Fifty-six per cent highlighted adapting to climate change and meeting sustainability targets as the major issue facing the industry. Again, money can help here with capital grants for environmental infrastructure. There was also an emphasis put on the need for further education and training.

The climate challenge is a longer-term one for agriculture, and it is critical for the industry to meet it in a way that is sustainable for both itself and wider society. What that solution looks like is not clear and is something which will have to be worked out with all stakeholder interests in mind.

The multiplier effect from agricultural activity is what keeps the towns in the survey, and almost all of rural Ireland, economically viable. In highlighting and quantifying how large that effect is, this report will help policymakers design solutions to current and future challenges the industry faces which can take account of how much there is to protect.

ANALYSIS

MEASURING THE ECONOMIC CONTRIBUTION OF AGRICULTURE, **LOCALLY AND NATIONALLY**

More than a local impact – rural economies, via agriculture, have a significant national economic impact

This year's *Agribusiness* report considers the contribution of rural agribusinesses towards overall economic output. We selected five rural towns across the island for our analysis, to explore how agriculture contributes to economic output and employment. To fully capture the economic linkages of rural communities, our analysis relates to economic activity within a 30km radius of each town.

The five towns were selected to cover a balanced mix of agri sub-sectors, and reflects the diversity in Ireland's agri-food sector. The majority of farms in Ballyhanuis rear either beef or sheep. Cavan has a mix of pig, poultry and beef farms. Charleville covers dairy, pig and tillage farming. Cookstown has a strong footprint across pig and poultry farming. Enniscorthy has a large tillage sector, followed by sheep farming.

Our analysis followed a two-pronged approach. First, we used our in-house economic impact assessment model to estimate each town's contribution to the national level economic output and employment. Second, we conducted a survey of farmers and businesses located within a 30km radius of each town. The survey results highlights both the sector's challenges and its opportunities for policy support. In addition, we considered industry data from various organisations, including the Central Statistics Office (CSO), Department of Agriculture Food and the Marine (DAFM), Teagasc, Bord Bia, Department of Agriculture, Environment and Rural Affairs (DAERA) and the Northern Ireland Statistics and Research Agency (NISRA).

Broadly, economic impacts arise when the agri-



REQUIER WAIT,
MANAGER, KPMG
STRATEGY
& FRASER
CLARKE, SENIOR
ASSOCIATE,
KPMG STRATEGY

culture sector buys inputs that are produced in other sectors in the economy.

The purchase of agricultural inputs creates a flow of expenditure and a multiplier impact across the economy. Higher demand for agricultural output requires producers (the sector) to increase their purchases of goods and services from their suppliers to produce the product in question.

In turn, suppliers of agricultural inputs increase their purchases of the goods and services they need to produce the products they supply to the agricultural sector. This creates additional rounds of expenditure in the value chain, also referred to as the multiplier impact, that lead to increased output and employment. Our economic multipliers incorporate the following components:

- 1** Direct impacts, for example impacts directly accruing from expenditure by farmers in the sector (eg purchase of farming inputs).
- 2** Indirect impacts, for example impacts generated from expenditure by businesses within the sector's supply chain.
- 3** Induced impacts, for example impacts generated from the spend of individuals and businesses outside the sector as a result of increased incomes (eg, additional household expenditure as a result of increased incomes).

ECONOMIC IMPACT

Our impact assessment estimates the local and national level economic impact of the agri-food value chain in terms of gross economic output and employment for each sub-sector (beef, dairy, sheep, poultry, pig, tillage) and using pro-forma values and specific assumptions.

We use each town's hectares of tillage planted and stock numbers for animal production as an indication of their relative share in national level economic activity.

Considering agriculture's national level economic impact, and taking a 30km catchment area for each town, we assumed that each town's contribution is approximately proportional to the share in hectares of tillage planted and stock numbers.



Based on national level economic activity, the agri-food value chain (primary and processing) contributed ~€21.123bn to national (ROI) gross economic output (2021).

Similarly, the agri-food value chain (primary and processing) contributed ~€9.0bn to national (NI) gross economic output (2021).

Considering the national level employment multiplier impact in ROI, expenditure in the primary agriculture sector supports approximately 178,600 jobs. Based on the national level employment multiplier impact in NI, primary agriculture supports approximately 52,900 jobs.

Considering the primary and processing components of agriculture within a 30km radius of each town, the four towns generate a combined ~€4.947bn for the Republic of Ireland's (ROI's) national economic output. Similarly, Cookstown contributes ~£1.634bn to Northern Ireland (NI's) national economic output.

In terms of national level employment, a combined ~41,388 jobs are linked to activities in the agri-food sector in Ballyhaunis, Cavan, Charleville and Enniscorthy. Similarly, for national level employment, the sector in Cookstown supports ~10,040 jobs.

While the analysis highlights the towns' relative contribution to overall economic output, the survey undertaken in parallel adds context and colour.

Respondents highlighted several key challenges for the sector, including rising input costs, adapting to climate change, stagnant product prices as well as sourcing costs and retaining labour. Feedback from respondents suggests that supports in the form of CAP support, capital grants and tax reliefs could help the sector to mitigate these challenges.

€4.947BN

Ballyhaunis, Cavan, Charleville and Enniscorthy's approximate contribution to the Republic of Ireland's national economic output

41,388

jobs are linked to activities in the agri-food sector in Ballyhaunis, Cavan, Charleville and Enniscorthy

£1.634BN

Cookstown's approximate contribution to Northern Ireland's national economic output

10,040

jobs are linked to activities in the agri-food sector in Cookstown

Taken together, it is clear that agriculture has a strong footprint across the five towns analysed. There is a strong inter-relationship between rural areas and communities and the sector's local value chains, economic output and employment.

As the leading professional services firm on the island of Ireland, KPMG supports multiple public sector and private sector players across the agri-food sector through Audit, Tax, Deal Advisory and Consulting services. We are committed to supporting the sustainability and growth of the sector through the provision of unrivalled economic and strategic advice.

KPMG STRATEGY

The KPMG Strategy team worked closely with the Irish Farmers Journal to design, conduct and deliver this year's report. KPMG's Strategy practice is Ireland's #1 strategy house, with unrivalled international

experience and sector depth in the Irish market, north and south. Our multidisciplinary team combines experience across growth and decarbonisation strategies, operations and supply chain benchmarking, commercial due diligence and economic

impact assessments. We have worked with Tirlán, Carbery, Lakeland, Kerry, Bord Bia, Dairy Council for Northern Ireland, and the Department of Agriculture, Food and the Marine, among others

EXECUTIVE SUMMARY

KEY NUMBERS

The five towns selected for this analysis make a vital contribution to the island of Ireland's overall economic output and employment.



BALLYHAUNIS



€708M

contribution to
national economic
output



6,845

Employment



CAVAN



€1,294M

contribution to
national economic
output



11,565

Employment



CHARLEVILLE



€1,701M

contribution to
national economic
output



13,100

Employment

OVERVIEW OF TOWNS



The five towns selected for this analysis cover a good mix of agricultural sub-sectors throughout the island of Ireland.

- **Ballyhaunis:** main focus is beef and sheep farming.
- **Cavan:** combination of pig, poultry and beef farms.
- **Charleville:** strong focus on dairy and pig farming.
- **Cookstown:** mix of agri sub-sectors, including pig and poultry farming.
- **Enniscorthy:** large tillage sector, followed by sheep farming.

ECONOMIC IMPACTS



Our economic impact analysis for each town incorporates the economic impacts of the agri-food value chain at the national level, pro-forma values and specific assumptions to derive each town's contribution to the national level economic impact of the agri-food value chain. Pro-forma values consider each town's relative share in the hectares of tillage planted, including herd and flock numbers for animal production within a 30km radius of each town.

Our impact assessment estimates the national level economic impact of the agri-food value chain in terms of gross economic output and employment for each sub-sector (beef, dairy, sheep, poultry, pig, tillage). Based on pro-forma values and specific assumptions, we derive and report on each town's contribution to this national level economic impact.

CHALLENGES & POLICY SUPPORT

Survey respondents highlighted the following as key challenges for the sector:

- Rising input costs.
- Adapting to climate change/meeting sustainability targets.
- Stagnant product prices/margins.
- Sourcing and retaining labour.

Survey respondents highlighted the following as key policy supports to counter the sector's challenges:

- CAP supports.
- Capital grants.
- Tax reliefs.



COOKSTOWN



€1,634M

contribution to national economic output



10,040

Employment



ENNISCORTHY



€1,244M

contribution to national economic output



9,878

Employment

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1

THE
TOWNS

AGRI BUSINESS

THE TOWNS

Sources: KPMG survey, CSO, DAFM.



Cookstown

Cookstown, Co Tyrone, Northern Ireland (NI) has a mix of agricultural sub-sectors. Cookstown represents a large proportion of NI's pig and poultry farming activity, with 32% of NI poultry and 23% of NI pigs located within a 30km radius of the town. Key agri-food businesses include KarroFood Group Ltd, Moy Park and Foyle Food Group.



Ballyhaunis

The majority of farms in Ballyhaunis, Co Mayo, ROI, produce either beef or sheep. Five per cent of ROI's sheep and 8% of ROI's beef cow population are located within a 30km radius of Ballyhaunis. Key agri-food businesses in the area include Western Brand, Dawn Meats and Kepak.



Cavan

Cavan, Co Cavan, Republic of Ireland (ROI) has a well-established pig and poultry industry, with 34% of ROI poultry and 23% of ROI pigs located within a 30km radius from of the town. Seven per cent of ROI beef cows are located here. Key agri-food businesses include McCarren, Liffey Meats and Rosderra.



Enniscorthy

Enniscorthy, Co Wexford, ROI, has a large tillage sector. Seventeen per cent of ROI farmed cereal land is located within a 30km radius from Enniscorthy. Six per cent of ROI's sheep flock is located in this area. Key agri-food businesses include Cooney Furlong and Irish Country Meats.



Charleville

Charleville, Co Cork, ROI, has a strong dairy industry with 13% of ROI's dairy cow population being within a 30km radius of the town. Ten per cent of ROI's pigs and farmed cereal land are located here. Key agri-food businesses include Kerry Foods and Dawn Meats.

Ballyhaunis

APPROXIMATELY

9,900

FARMS



11,000
Dairy cows



79,000
Beef cows



280,000
Sheep



79,000
Pigs

800

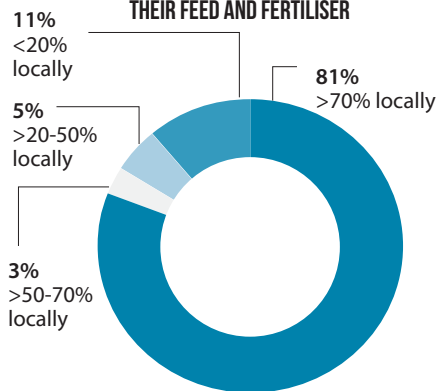


ON-FARM EMPLOYMENT

91,000

POPULATION

WHERE FARMERS SOURCE/PURCHASE THEIR FEED AND FERTILISER



160HA
Cereals,
231,000ha
grassland



300,000
Poultry

KEY AGRIBUSINESSES



WHAT CAN BE DONE TO HELP FARMERS?

GREATER TAX RELIEFS FOR FIRST COUPLE OF YEARS AND ENTRY GRANTS COULD HELP ATTRACT NEW ENTRANTS

EASING OF REGULATIONS COULD BE BENEFICIAL TO SMALLER FARMERS THAT ALREADY FEEL OVERWHELMED

Charleville

APPROXIMATELY

7,100
FARMS



198,000
Dairy cows



39,000
Beef cows



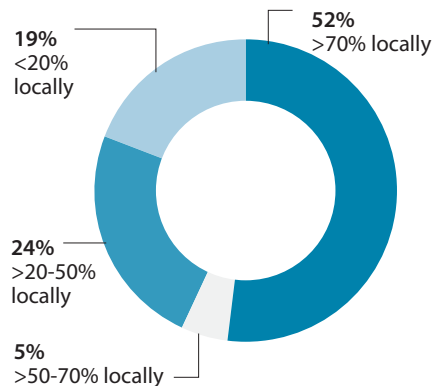
24,000
Sheep



150,000
Pigs

16,000 
ON-FARM EMPLOYMENT

WHERE FARMERS SOURCE/PURCHASE THEIR FEED AND FERTILISER



138,000
POPULATION



8,300HA
cereals,
265,000ha
grassland



300,000
poultry

WHAT CAN BE DONE TO HELP FARMERS?

GREATER TAX RELIEFS FOR FIRST COUPLE OF YEARS AND ENTRY GRANTS COULD HELP ATTRACT NEW ENTRANTS

EASING OF REGULATIONS COULD BE BENEFICIAL TO SMALLER FARMERS THAT ALREADY FEEL OVERWHELMED

KEY AGRIBUSINESSES



*Ahern's
Organic
Farm*





Talk or action?

If you're serious about sustainability,
KPMG insights can help you move
from talk to action.

#FromTalkToAction



kpmg.ie

Cavan

APPROXIMATELY

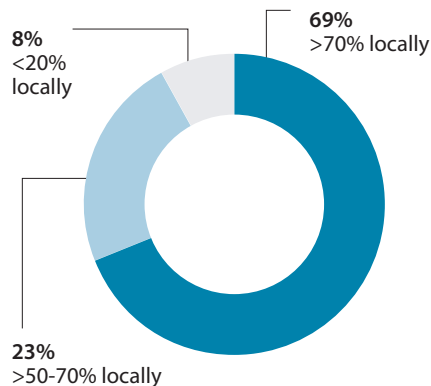
8,300
FARMS

1,300
ON-FARM EMPLOYMENT



103,000
POPULATION

WHERE FARMERS SOURCE/PURCHASE THEIR FEED AND FERTILISER



WHAT CAN BE DONE TO HELP FARMERS?

GOVERNMENT FINANCIAL ASSISTANCE COULD BOOST INSTALLATION OF PV PANELS THAT WOULD ALLOW FARMERS TO USE GREEN ENERGY, SAVING COSTS AND MAKING OPERATIONS MORE SUSTAINABLE



54,000
Dairy cows



71,000
Beef cows



161,000
Sheep



360,000
Pigs



0ha
cereals,
212,000ha
grassland



5M
poultry

KEY AGRIBUSINESSES



Enniscorthy

APPROXIMATELY

5,500

FARMS



78,000
Dairy cows



42,500
Beef cows



331,000
Sheep



81,000
Pigs



46,000HA
cereals,
231,000ha
grassland



11,000
poultry

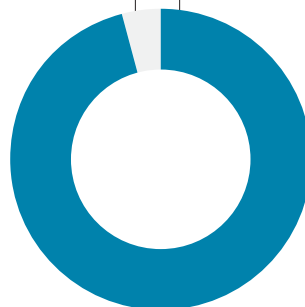
1,000
ON-FARM EMPLOYMENT



WHERE FARMERS SOURCE/PURCHASE
THEIR FEED AND FERTILISER

4%
>50-70% locally

96%
>70% locally



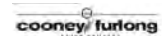
169,000
POPULATION

WHAT CAN BE DONE TO HELP FARMERS?

STUDENTS ENROLLED ON AGRI PROGRAMMES NEED TO BE PROVIDED WITH RELEVANT PRACTICAL EXPERIENCE. ACADEMIC KNOWLEDGE ALONE DOES NOT HELP FARMERS TO GET WORK DONE

THE SECTOR NEEDS TO BE SUSTAINABLE BOTH FINANCIALLY AND ENVIRONMENTALLY

KEY AGRIBUSINESSES



Cookstown

APPROXIMATELY

2,400

FARMS



40,000
Dairy cows



37,000
Beef cows



136,000
Sheep



105,000
Pigs

2,214

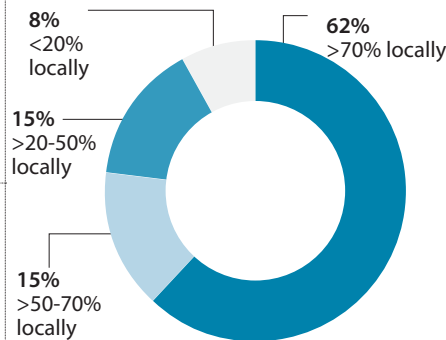


ON-FARM EMPLOYMENT

90,000

POPULATION

WHERE FARMERS SOURCE/PURCHASE THEIR FEED AND FERTILISER



4,628HA
cereals,
124,383ha
grassland



8.4M
poultry

WHAT CAN BE DONE TO HELP FARMERS?

GOVERNMENT FINANCIAL ASSISTANCE COULD BOOST INSTALLATION OF PV PANELS THAT WOULD ALLOW FARMERS TO USE GREEN ENERGY, SAVING COSTS AND MAKING OPERATIONS MORE SUSTAINABLE

KEY AGRIBUSINESSES

KARRO
FOOD GROUP

dale
farm

Moy
park

Foyle
FOOD
GROUP

cafre
College of Agriculture,
Food & Rural Enterprise

2

**ECONOMIC
IMPACT**



WEIGHING UP AGRICULTURE'S ECONOMIC IMPACT

Economic impact assessments consider the injection of income as a result of a specific event, policy choice or economic activity from a specific industry.

The agriculture sector buys inputs that are produced in different sectors within the economy. The purchase of agricultural inputs creates a flow of expenditure and a multiplier impact within the economy.

The geographic/spatial viewpoint assumed in an economic impact analysis will influence the extent of leakage of expenditure. For example, on a county or city level, more value chain inputs will be sourced from “outside” the focus area, resulting in leakage of expenditure out of the focus area. Similarly, on a national level, imported components will create a leakage of expenditure that lowers the overall economic impact.

Our economic impact analysis for each town incorporates the economic impacts of the agri-food value chain (including the primary and processing sector) at the national level, pro forma values and specific assumptions to derive each town’s contribution to the national level economic impact of the ag-

ri-food value chain. Pro forma values consider each town’s relative share in the hectares of tillage planted, including herd and flock numbers for animal production within a 30km radius of each town.

ECONOMIC IMPACT ANALYSIS

An increase in demand for agricultural output requires producers (the sector) to increase their purchases of goods and services from their suppliers to produce the product in question.

In turn, suppliers of agricultural inputs increase their purchases of the goods and services they need to produce the products they supply to the agricultural sector.

This creates additional rounds of expenditure in the value chain, also referred to as the multiplier impact, that leads to increased output and employment.

The overall economic impact can be categorised in terms of the following components:

1. **Direct:** impacts directly accruing from expenditure by farmers in the sector (eg purchase of farming inputs).
2. **Indirect:** impacts generated by expenditure by businesses within the sector’s supply chain.
3. **Induced:** impacts generated by the spend of individuals and businesses outside the sector as a result of increased incomes (eg additional household expenditure as a result of increased incomes).

MEASURING ECONOMIC IMPACT

Our impact assessment estimates the national level economic impact of the agri-food value chain in terms of gross economic output and employment for each sub-sector (beef, dairy, sheep, poultry, pig, tillage). Based on pro forma values and specific assumptions, we derive and report on each town’s contribution to this national level economic impact.

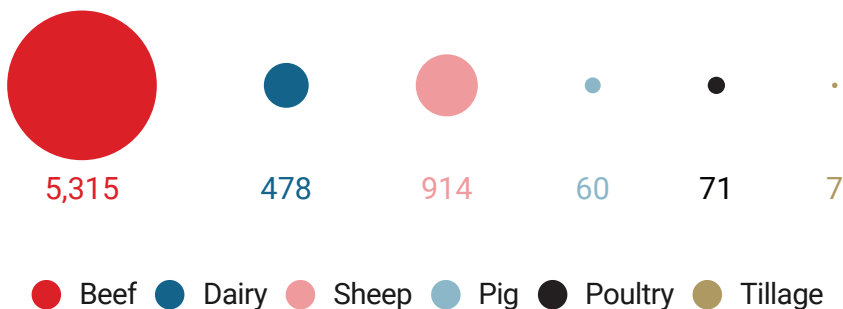
BALLYHAUNIS

Ballyhaunis contributed ~€708m to Ireland's gross economic output

CONTRIBUTION TO NATIONAL ECONOMIC OUTPUT (AGRI-FOOD VALUE CHAIN), €M



CONTRIBUTION TO VALUE CHAIN EMPLOYMENT (PRIMARY AGRICULTURE), TOTAL EMPLOYMENT



6,845

PEOPLE EMPLOYED IN AGRICULTURE

OVERVIEW OF TOWNS

Considering economic activity (2021) within a 30km radius, Ballyhaunis contributed ~€708m to national (ROI) gross economic output through the direct, indirect and induced spending from the agri-food value chain (primary and processing).

- On a sub-sector level, Ballyhaunis's beef sub-sector makes the largest

contribution, €588m (83%), to national gross economic output. This is followed by the dairy sub-sector with a €66m (9%) contribution and the sheep sub-sector with a €38m (5%) contribution.

- Based on Ballyhaunis' relative share in the hectares of tillage planted, including herd and flock numbers for animal production, the Ballyhaunis agriculture sector accounts

for ~2.2% of the national gross economic output of the agri-food sector.

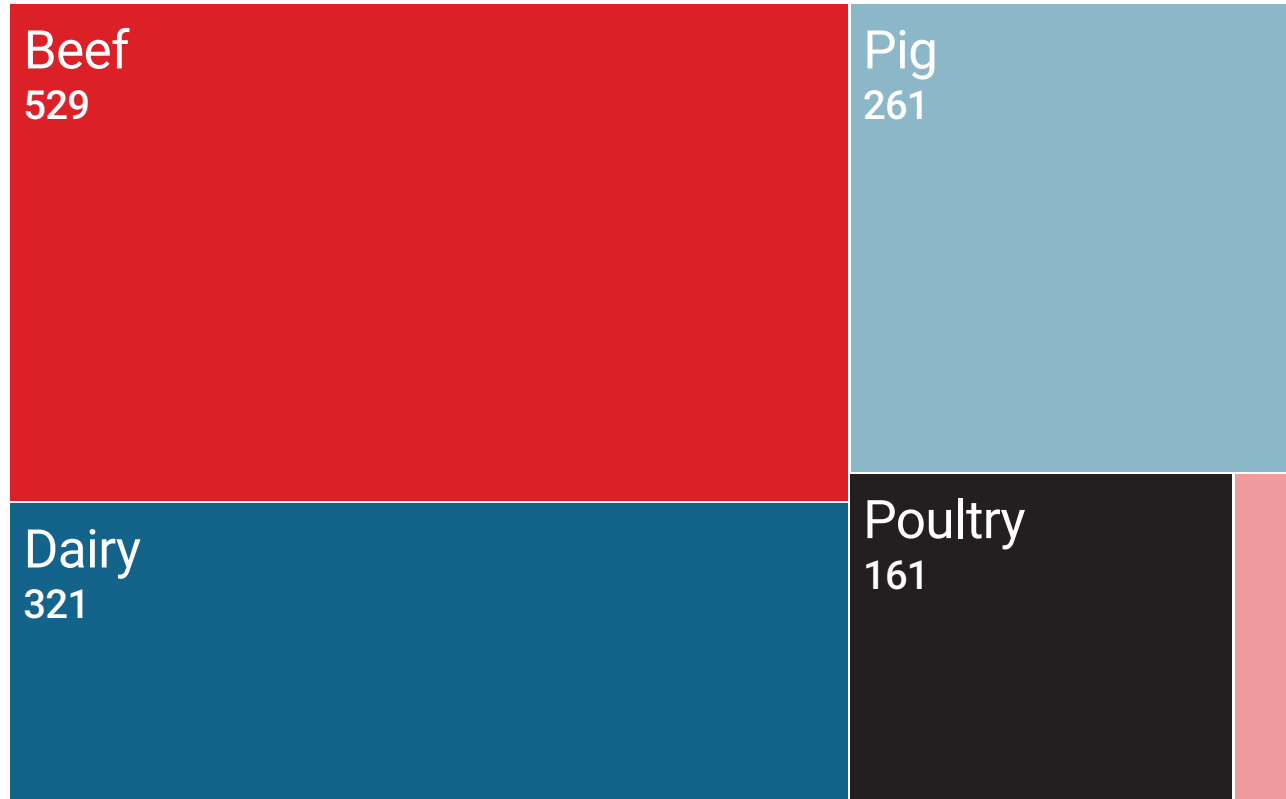
- Considering the employment multiplier impact of primary agriculture, approximately 6,845 jobs are linked to the Ballyhaunis agriculture sector through direct and indirect supply chain purchases in the agri-food value chain (primary and processing).

ECONOMIC IMPACT

CAVAN

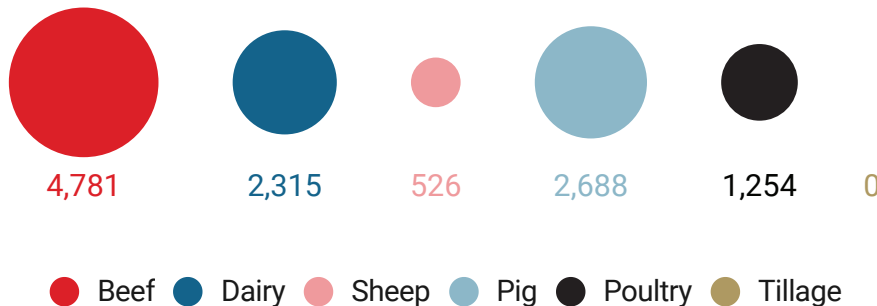
Cavan contributed ~€1,294m to Ireland's gross economic output.

CONTRIBUTION TO NATIONAL ECONOMIC OUTPUT (AGRI-FOOD VALUE CHAIN), €M



Sheep 22

CONTRIBUTION TO VALUE CHAIN EMPLOYMENT (PRIMARY AGRICULTURE), TOTAL EMPLOYMENT



11,565

PEOPLE EMPLOYED IN AGRICULTURE

OVERVIEW OF TOWNS

Considering economic activity (2021) within a 30km radius, Cavan contributed ~€1,294m to national (ROI) gross economic output through the direct, indirect and induced spending from the agri-food value chain (primary and processing).

- On a sub-sector level, Cavan's beef sub-sector makes the largest

contribution, €529m (41%), to national gross economic output. This is followed by the dairy sub-sector with a €321m (25%) contribution and the pig sub-sector with a €261m (20%) contribution.

- Based on Cavan's relative share in the hectares of tillage planted, including herd and flock numbers for animal production, the Cavan agriculture sector accounts for

~6.1% of the national gross economic output of the agri-food sector.

- Considering the employment multiplier impact of primary agriculture, up to 11,565 jobs are linked to the Cavan agriculture sector through direct and indirect supply chain purchases in the agri-food value chain (primary and processing).

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Mini Hero

The
Baker's Choice



The
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The
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The
Big Softie

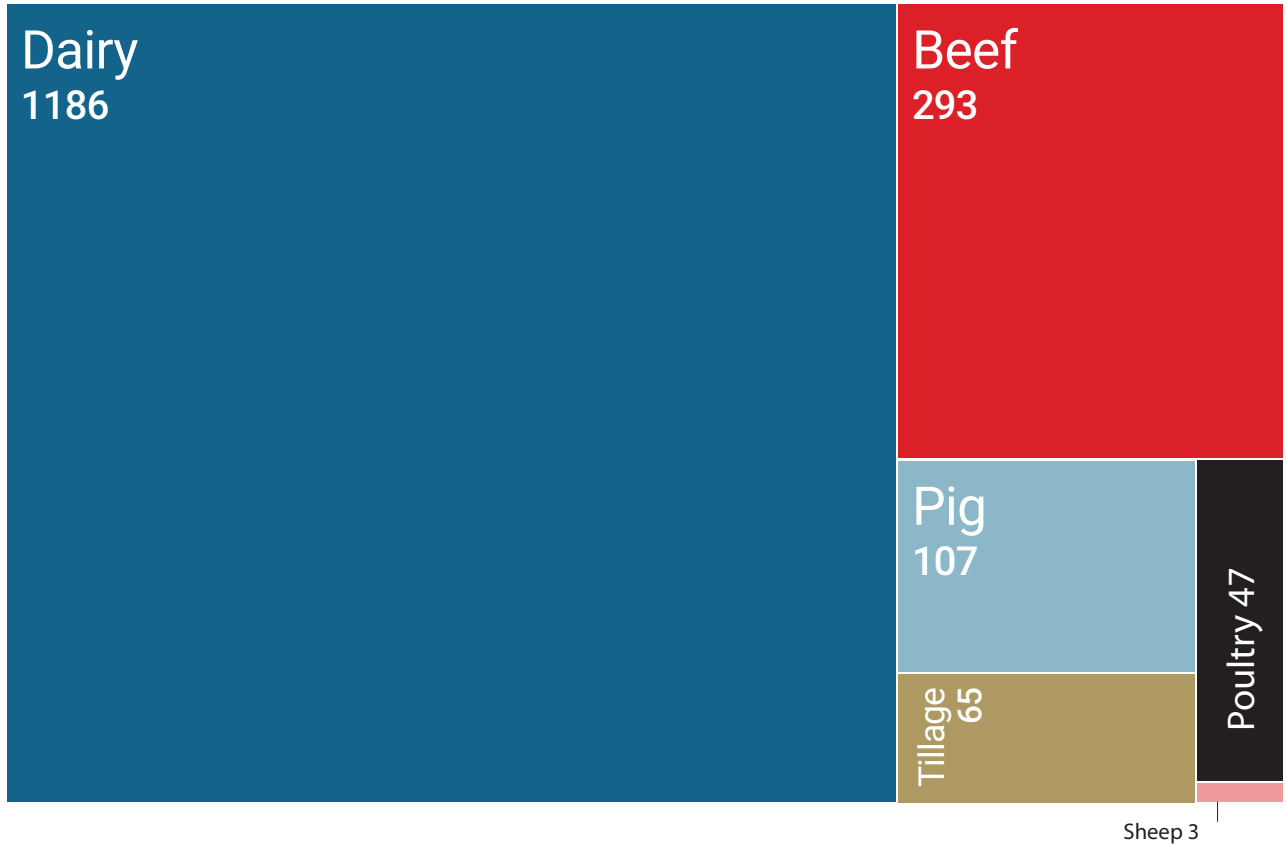


ECONOMIC IMPACT

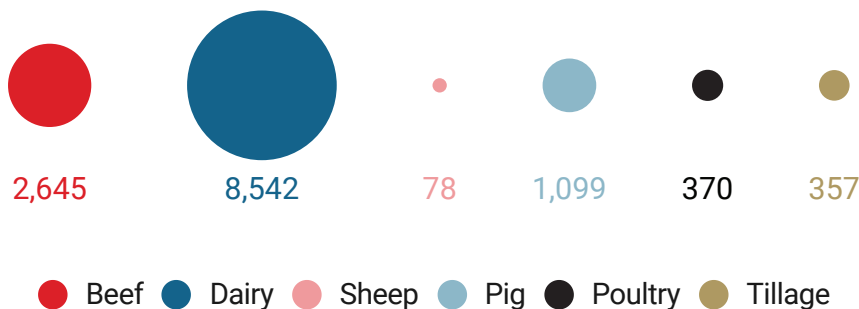
CHARLEVILLE

Charleville contributed ~€1,701m to Ireland's gross economic output

CONTRIBUTION TO NATIONAL ECONOMIC OUTPUT (AGRI-FOOD VALUE CHAIN), €M



CONTRIBUTION TO VALUE CHAIN EMPLOYMENT (PRIMARY AGRICULTURE), TOTAL EMPLOYMENT



13,100

PEOPLE EMPLOYED IN AGRICULTURE

OVERVIEW OF TOWNS

Charleville contributed ~€1,701m to national (ROI) gross economic output through the direct, indirect and induced spending from the agri-food value chain (primary and processing).
 • On a sub-sector level, Charleville's dairy sub-sector makes the largest contribution, €1,186m (70%), to national gross economic output.

This is followed by the beef sub-sector with a €294m (17%) contribution and the pig sub-sector with a €107m (6%) contribution.

• Based on Charleville's relative share in the hectares of tillage planted, including herd and flock numbers for animal production, the town's agriculture sector accounts for

~8.1% of the national gross economic output of the agri-food sector.

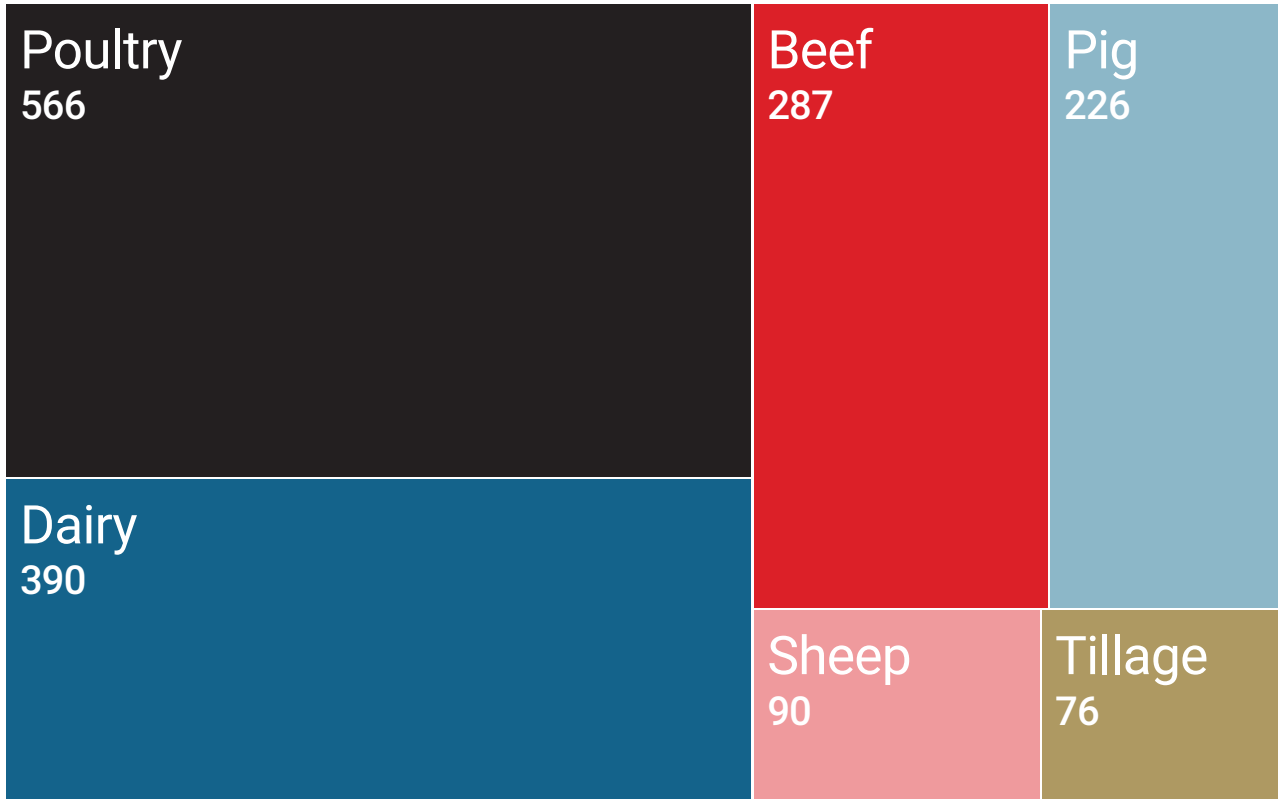
Considering the employment multiplier impact of primary agriculture, approximately 13,100 jobs are linked to the Charleville agriculture sector through direct and indirect supply chain purchases in the agri-food value chain (primary and processing).

COOKSTOWN

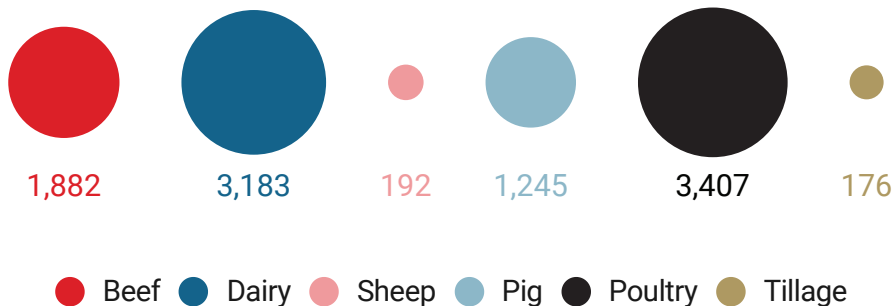
Cookstown contributed ~£1,634m* to NI's gross economic output.

*~£1,634 million contribution to national gross economic output is ~€1,879 million (£1 = €1.15 on 14 October 2022).

CONTRIBUTION TO NATIONAL ECONOMIC OUTPUT (AGRI-FOOD VALUE CHAIN), £M



CONTRIBUTION TO VALUE CHAIN EMPLOYMENT (PRIMARY AGRICULTURE), TOTAL EMPLOYMENT



10,040
PEOPLE EMPLOYED IN AGRICULTURE

OVERVIEW OF TOWNS

Considering economic activity (2021) within a 30km radius, Cookstown contributed ~£1,634m to national (NI) gross economic output through the direct, indirect and induced spending from the agri-food value chain (primary and processing).

- On a sub-sector level, Cookstown's poultry sub-sector makes the largest contribution, £566m (35%), to

national gross economic output. This is followed by the dairy sub-sector with a £386m (24%) contribution and the beef sub-sector with a £287m (18%) contribution.

- Based on Cookstown's relative share in the hectares of tillage planted, including herd and flock numbers for animal production, the Cookstown agriculture sector

accounts for ~18% of the national gross economic output of the agri-food sector.

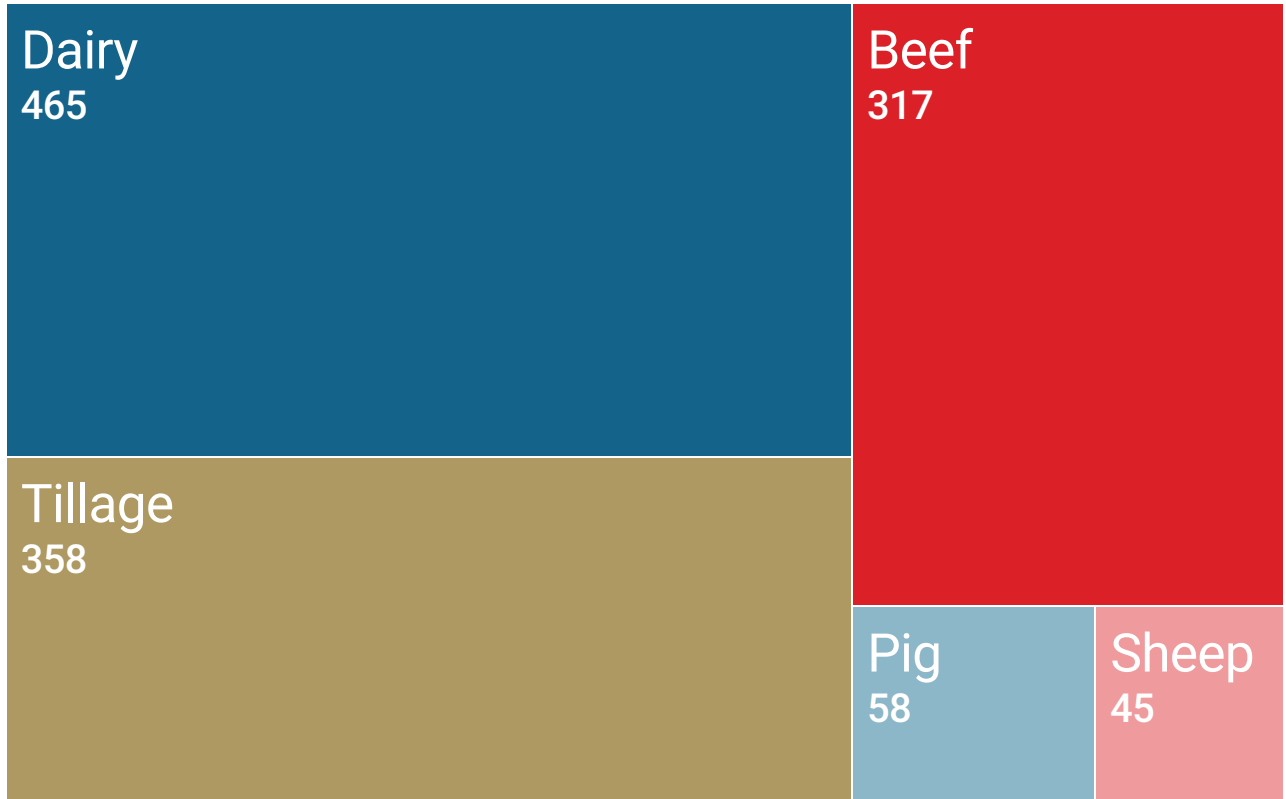
Considering the employment multiplier impact of primary agriculture, approximately 10,040 jobs are linked to the Cookstown agriculture sector through direct and indirect supply chain purchases in the agri-food value chain (primary and processing).

ECONOMIC IMPACT

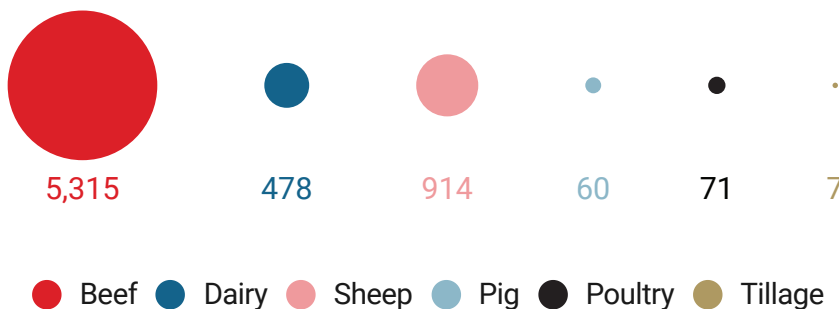
ENNISCORTHY

Enniscorthy contributed ~€1,244m to Ireland's gross economic output.

CONTRIBUTION TO NATIONAL ECONOMIC OUTPUT (AGRI-FOOD VALUE CHAIN), €M



CONTRIBUTION TO VALUE CHAIN EMPLOYMENT (PRIMARY AGRICULTURE), TOTAL EMPLOYMENT



6,845

PEOPLE EMPLOYED IN AGRICULTURE

OVERVIEW OF TOWNS

Enniscorthy contributed up to €1,244m to national (ROI) gross economic output through the direct, indirect and induced spending from the agri-food value chain (primary and processing)

- On a sub-sector level, Enniscorthy's dairy sub-sector makes the largest contribution, €465m (37%), to national gross economic

output. This is followed by the tillage sub-sector with a €358m (25%) contribution and the beef sub-sector with a €317m (25%) contribution.

- Based on Enniscorthy's relative share in the hectares of tillage planted, including herd and flock numbers for animal production, the Enniscorthy agriculture sec-

tor accounts for ~5.9% of the national gross economic output of the agri-food sector

Considering the employment multiplier impact of primary agriculture, approximately 9,878 jobs are linked to the Enniscorthy agriculture sector through direct and indirect supply chain purchases in the agri-food value chain (primary and processing).

3

ON THE
GROUND

BALLYHAUNIS

‘OUR BUSINESS
WOULDN’T SURVIVE
WITHOUT FARMING’

Ballyhaunis is a super town that is boxing above its weight as far as rural towns are concerned in the west of Ireland, **Jack Kennedy** reports

Rory Breslin’s Fair Day sculpture in the centre of Ballyhaunis town harks back to an era that saw farming and food central to the establishment of the Co Mayo town. The word ‘central’ probably underplays the importance of food and farming to Ballyhaunis as a business unit, as a town that is built on food and farming in it’s hinterland.

The sculpture depicts the farmer bringing the calf to the town for sale, the haggle with the calf dealer, the celebratory drink once the deal is done, and then the spending of the money on supplies. In so many ways so much has changed, yet in others so little has changed. The same deal still goes on to this very day in Ballyhaunis, but, in a very different way.

Now Aurivo has a dedicated mart business in the west of Ireland that uses MartBids technology to allow farmers buy and sell cattle online. Aurivo Co-op has a dedicated Homeland store in Ballyhaunis that allows farmers get supplies in an organised one-stop shop. If they can’t get it in Aurivo, they can go to the purpose-built Delaney Hardware store and builders providers on the ring road that runs around the town. Once they have some of the money spent on feed, gates and animal health products, they go to Eddie Murphy’s and they can get workwear, or to Finn’s, to Forde’s or to Cathal Phillips.

I was in Ballyhaunis in August and a key part of the Forde business is school uniforms. Needless to say, it was hard work trying to get two minutes with owner Tom Forde. Tom is crystal clear on the importance of farming and food to the development of the town. “The importance of food and farming to this town and community was instilled with me since I was knee high. To be quite honest with you, our business wouldn’t survive without farming. To sum it all up in one sentence – give the farmers a few euro

and we are all better off. If they have it, they spend it, and I will fight on behalf of that all day,” he said. Tom is current president of the town Chamber of Commerce.

Suckler and sheep farmers around Ballyhaunis are farming to fill the food factories and also often are working part-time in the local factories. Tom is clear on the importance. “We call ourselves in Ballyhaunis an agri hub. Look at the industries in the hinterland – Grasscare, Major, McHale, Agri-Spread. They are all manufacturing and creating employment. Look at the food factories, Dawn Meats, Western Brand – huge employers. The bottom line is the main key industries that the Government are looking for the sustainability of our domestic growth are food and farming and the resources need to be poured into those areas and we do them well around here. You are looking at over 2,500 food and farming related jobs in this town. That was 2,000 a few years ago. There will be 3,000 before you know it because of the growth in those sectors.”

Dawn Meats and Western Brand are two anchor employers in Ballyhaunis. Between them they employ upwards of 1,500 people directly and many more indirectly because of transport, services, etc that work with the factories. They also allow farming to continue on the relatively small and fragmented holdings in these parts, because, many of the local farmers are working with these companies and are also farming part time.

The same is true for the machinery hub, again located on the outskirts of Ballyhaunis. World-renowned farm machinery is manufactured and exported from the west of Ireland. Key players such as McHale, Major, Cashels Engineering, EPS and Grasscare all employ local farmers part-time. The symbiotic relationship between sheep and cattle



Give the farmers a few euro and we are all better off



LÁ AN AONAIGH - FAIR DAY
BY RORY BRESLIN
UNVEILED BY TIM QUINN
CATHAOIRLEACH MAYO COUNTY COUNCIL
JUNE 2003
IN ASSOCIATION WITH THE
MAYO MILLENIUM SCULPTURE INITIATIVE

and working part-time works for this part of Ireland. Families make it work because if the principal farmer is busy working off-farm other family members are called in and help out on the farm and it creates this evolution of ownership and understanding of farming and food.

This then spills over into other services required by families. Ballyhaunis has this in abundance. You can go to Curley's, Moran's, the local Costcutter Gem Newsagents, and Nolan's SuperValu for everyday spending and then Keane's kitchens and Heneghan's for furniture.

This is the very real spin-off into the local community of farming and what it does for towns like Ballyhaunis. But agribusinesses aren't the only show in town. There are companies like B-Pod, which makes bespoke prefabricated bathroom pods that are dropped into many of the high-rise apartments in Dublin City centre.

What I picked up is the frustration for the likes of Tom Forde and other business owners in that they

work day and night to make a business work, but their business is a spin-off of another business which is food and farming that is getting a media hammering.

They then hear and see Government policy attack Irish food and farm businesses to reduce stock on farms that are the bread and butter of farmer and the town's livelihood and the reason they exist.

They turn the dial or turn the page and they hear what's happening in South America or China that maybe are not moving in the same sustainable circles as the EU. They then wonder about the attack on an Irish food business on which their business is very dependent on and ask the question why Irish agriculture needs to adhere to such red tape and regulation that is slowly strangling a rural locality and not allowing it to breathe.

Businesses in Ballyhaunis are very clear – food and farming puts Ballyhaunis on the map. Without the suckler and sheep sector, the main street would be very quiet.

**Rory Breslin's
Fair Day
sculpture in
the centre of
Ballyhaunis
town.**

ENNISCORTHY

HISTORIC TOWN HAS ALWAYS COUNTED FARMING AS THE HUB OF ITS ECONOMY

The historic Wexford town still has farming and agri-business at the heart of its local economy, writes Pat O’Toole

Enniscorthy is the most central of Wexford’s four main towns. Situated on the tidal point of the River Slaney, it has long been a market town with farming and agribusiness at its heart. The town boasted both a wheaten flour mill (Davis’s) and a large maltings up until the 1970s.

One is now derelict, the other a shopping centre. It’s a microcosm of Enniscorthy’s fortunes, where the retail sector faces intense competition from Wexford and Gorey. It has neither the large employers of Wexford, nor the commuter-town status of Gorey.

There are many empty shopfronts around the town, but a resilient core of retail trade remains in a town of over 11,000 inhabitants.

There is a large hub of agribusiness on the Dublin Road side of the town, with Donohoe’s, TFM, and Cooney-Furlong all boasting extensive agri-machinery outlets. The latter two have spent massively on showrooms in recent years. Murphy Concrete Products occupy the old Boortmalt site in Kilcannon, adjacent to TFM.

MART

Enniscorthy Mart, the largest covered mart in Europe when it opened in the 1960s, still passes a lot of sheep and cattle through its three rings. The Solutions Group, formerly Wexford Farm Relief Services, offers relief labour, contract workers and anchors one of the largest purchasing groups in the country.

Ten per cent of Ireland’s agricultural output comes from Co Wexford, so all these businesses are supporting up to half a billion euros of farm-

ing output. While Cooney-Furlong (on the original WFC site) is the only grain merchant remaining in the town, there are a dozen within a 10-mile radius. These range from Tirlán and Boortmalt (assembled through two independent merchants) to a range of family merchants.

Some of these are long established, others are new players. Names like Bolgers, Ballyhamilton Grain, Cooney-Furlong, Cullens, Doyles, Gardiners, Kavanaghs, O’Sullivan and Rothwell (strictly alphabetical order) might mean little on the national stage, but they ensure a unique level of competition for grain purchase, input sales, and provide a wide range of animal feed.

LARGE HINTERLAND

Indeed, Enniscorthy has a large hinterland, stretching past Ferns and Bunclody northwards, across to the Blackstairs mountains to the west, down towards Clonroche and Oylegate to the south, and past Oulart and Kilmuckridge to the sea along the east.

There are sheep and beef processing plants within its compass, Irish Country Meats outside Ferns and Slaney Foods in Clohamon.

There has also been significant dairy expansion since quotas ended, with most supplying Tirán, although a significant number of former Wexford Creamery suppliers send their milk to Strathroy now. As is typical in a tillage area, there are a number of large pig units.

The historic town of Enniscorthy has always counted farming as the hub of its economy, and that won’t be changing anytime soon.



There has been significant dairy expansion since quotas ended



COOKSTOWN

AGRICULTURE IS THE LIFEBLOOD OF COOKSTOWN

Cookstown in Co Tyrone is surrounded by high-quality farmland with a huge processing industry which drives almost all commercial activity in the town, writes **Phelim O'Neill**

Cookstown is a bustling market town located at the edge of the Sperrin Mountains in the eastern end of Co Tyrone. When the *Irish Farmers Journal* called into traders in the town during August, there was a common consensus that without farming and food processing, there would be no reason for the town to exist. Cookstown is surrounded by high-quality farmland that is mainly dedicated to livestock, with dairying, beef and sheepmeat production all featuring. It is also home to Karro, the largest pigmeat processing facility in Ireland or Britain. It sources pigs from across the island of Ireland and is the biggest single customer for the estimated 360,000 pigs imported into Northern Ireland from the Republic last year.

As well as pig processing, Cookstown is also home to the Dale Farm dairy processing business at Dunman, about three miles from the town centre. This site is one of the largest cheese processors in Northern Ireland while 10 miles in the other direction the largest two beef and sheep processors, ABP and Dawn Meats, have factories next door to each other in Dungannon. Moy Park also has one of Europe's most modern poultry processing factories in Dungannon. Farming and processing dominate the economy of Cookstown and the surrounding area.

RETAIL

Being located less than a mile from the town centre, Karro employees are major spenders in the Cookstown retail sector, which is still dominated by independent traders in clothes, footwear, food and electrical goods, unlike many other towns. Cookstown traders seem to have achieved the difficult balance

between being sufficiently modern to compete with online and the major chains while holding traditional values of service and personality that retains customers and repeat business.

A further feature of these businesses is that they are in the same ownership for several generations. Thompson's shoes has been trading on the same site since 1958 while Tom Morrow's outfitters have been trading since 1968.

Topping all these is Sheehy's book shop, newsagent and stationers which has been trading in the same family for 100 years at this stage.

Independent butchers have been squeezed in many towns by the major supermarkets but in Cookstown the *Irish Farmers Journal* visited four butchers – McMahons, Knipes, McAtamneys and Huttons. While there were differences in the offerings, the common theme from all the butchers was knowing their customers and giving them what they want. "There is no point in us cutting up beef, putting it on display and assume customers will buy it," was the general comment and it is noticeable that there is a strong delicatessen and ready element to all of the butchers visited.

SERVICE PROVIDERS

Parkland's vets, one of Northern Ireland's largest practices, has a busy branch in Cookstown and like all modern veterinary practices has developed a significant small animal side to the business in addition to the more traditional farm animal practice.

As relatively little farmland is sold, Cookstown solicitors are less linked with farming but on the other hand there is a consistent demand from farmers for accountancy services in the town.



There is no point in us cutting up beef, putting it on display and assume customers will buy it



CHARLEVILLE

MILK THE ORDER OF THE DAY IN DAIRY STRONGHOLD

Charleville is an outstanding example of how primary agriculture sustains and supports the agri-food industry, with its longstanding tradition of dairy farming and milk processing, writes **Lorcan Roche Kelly**

There can be no doubt that you are in the heart of dairy country when entering the north Cork town of Charleville. While many towns have monuments to historical figures and events – and Charleville is no exception here – the public space at the top of Main Street is dedicated to a fountain celebrating, according to the adjoining plaque, the town’s “long-standing connection with the development of the dairy industry”.

The farmland surrounding the town is almost legendary for the quality of the grass it grows, and for the quality of milk that can be produced. Long known as the Golden Vale, the area gave its name to the milk-processing plant in the heart of the town (now Kerry Group).

That Kerry facility dominates the town. While the company has sponsored the horse-drawn cart filled with milk churns that make up the feature fountain on Main Street, that picture is light years away from the iPhone-app, data powered interaction between farmer and processor that exists in the town these days.

Charleville town is far from just a dairy-processing unit. It is a thriving urban centre with a huge variety of independent traders all through the town centre. It also has the full range of multiples, with Dunnes, SuperValu, Aldi and Lidl all having a presence.

The town has branches of both of Ireland’s pillar

banks, but those facilities are dwarfed by the size of the local credit union, a branch of the Mallow Credit Union which according to its latest accounts holds €172 million in deposits (or “members’ shares”).

Charleville is on the main Cork to Limerick road and is served by the Cork-Dublin rail line, making it very well connected to the rest of the country. There are plans to bypass the town as part of upgrade works on the N20, a route notorious for traffic delays. For Charleville, a bypass would likely further improve the town as much of the traffic on Main Street never stops.



The farmland surrounding the town is almost legendary for the quality of the grass it grows

EXPANSION

Being so well connected also means Charleville is seen as a town ripe for expansion. In 2015, the head of the School of Spatial Planning at DIT, Henk van der Kamp, suggested that the town was an ideal location for vastly increased size. He suggested that forward-looking planning and key investments could see the town with a population in the hundreds of thousands.

This may seem fanciful, but stop for a second and look at the difference between the horse-drawn cart at the top of the town, and the multi-billion industry that is today’s Kerry Group. Rather than being fanciful, the history of Charleville shows that anything can be possible.

\ Donal O'Leary and Lorcan Roche Kelly



CAVAN

FARMING IN THE BLOOD OF THE BREFFNI PEOPLE

Adam Woods takes a look at the importance of farming to the Cavan region

Farming is central to a lot of activity that takes place in Cavan and surrounding area. The Department of Agriculture has a large regional office in the town that employs a few hundred people. Cavan Mart has its sale every Friday which attracts important business to the town. The mart is attached to Poles Co-op, which has a state-of-the-art builders merchants yard and agricultural supply store located just outside Cavan on the Dublin road.

Lakeland Dairies, one of Ireland's largest dairy processors, is headquartered in Cavan town and has strong roots in the county, having had its previous base in Killeshandra. It also has a modern dairy processing facility in another county town, Bailieborough.

The Kepak pig processing facility which was formerly owned by the McCarrens is also an important employer in the town.

Liffey Meats also has a large beef processing facility located in the county in Ballyjamesduff.

Finbarr Kiernan vets, one of the largest practices in the border region, also has its main base just outside the town.

Cavan Equestrian Centre, a national show and sales venue for horses, stands on the western side of the town and attracts both national and international visitors to its monthly horse sales.

ENTERPRISING

Cavan farmers are known for their industrious and enterprising nature.

The difficult drumlin soils that predominate most of the county mean other enterprises which were less dependent on good land were looked at.



The now famous pig industry in the region started out on small livestock farms across the county.

The Kiernan family, famous in pig circles, have many piggeries situated across the county and are major players in Ireland's national pig industry.

Cavan famers have also been front and central in the erection of poultry houses over the years and in recent years many farmers have branched out into free-range egg production, with many modern units built on Cavan farms in recent years.

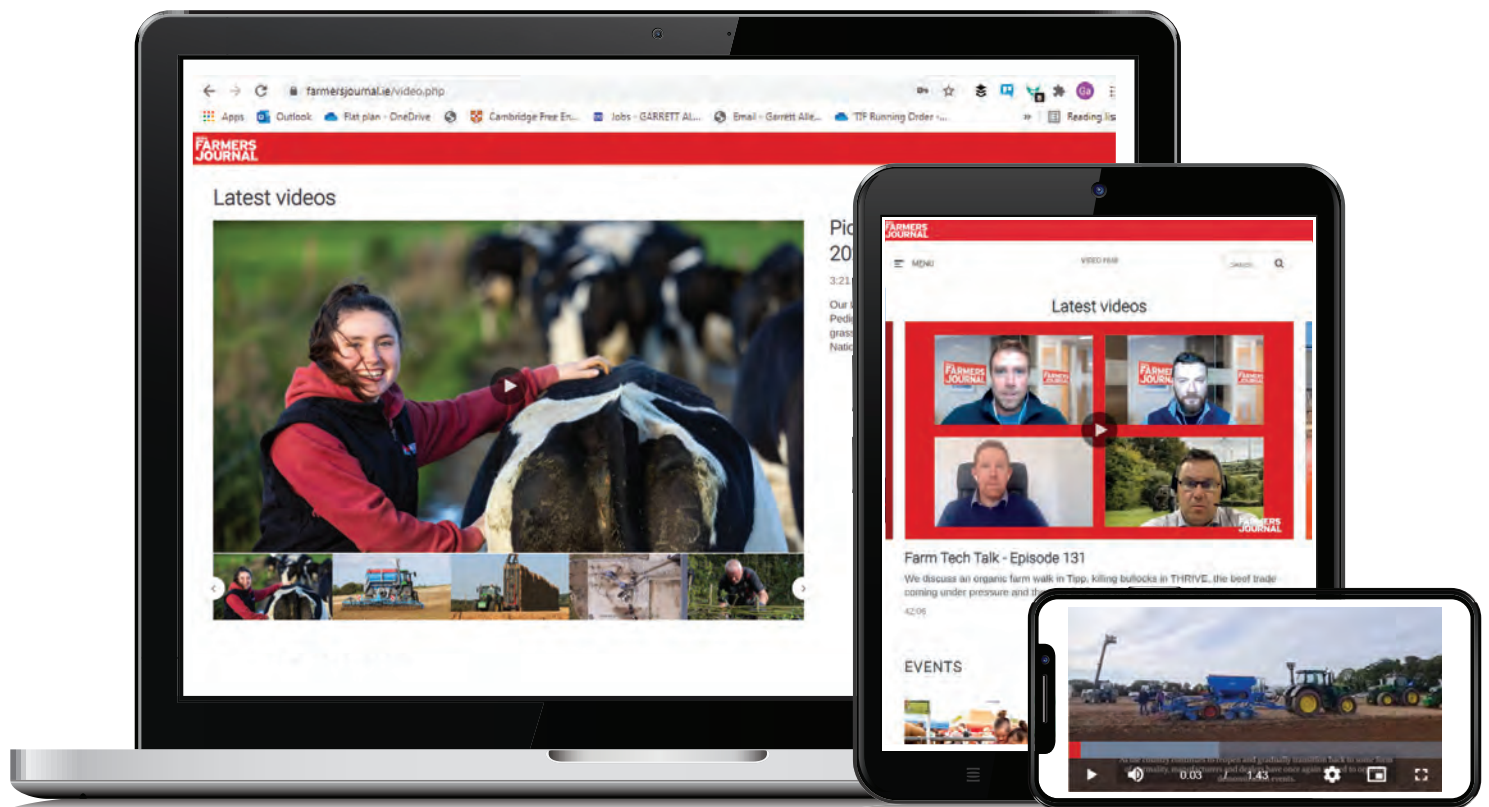
SUPPLY BUSINESSES

Farming has spawned many other supply business related to farming over the years with companies like AW Ennis, Gerald Clarke Machinery and Univet some of the more famous Cavan-based agribusinesses who that operate both nationally and internationally.



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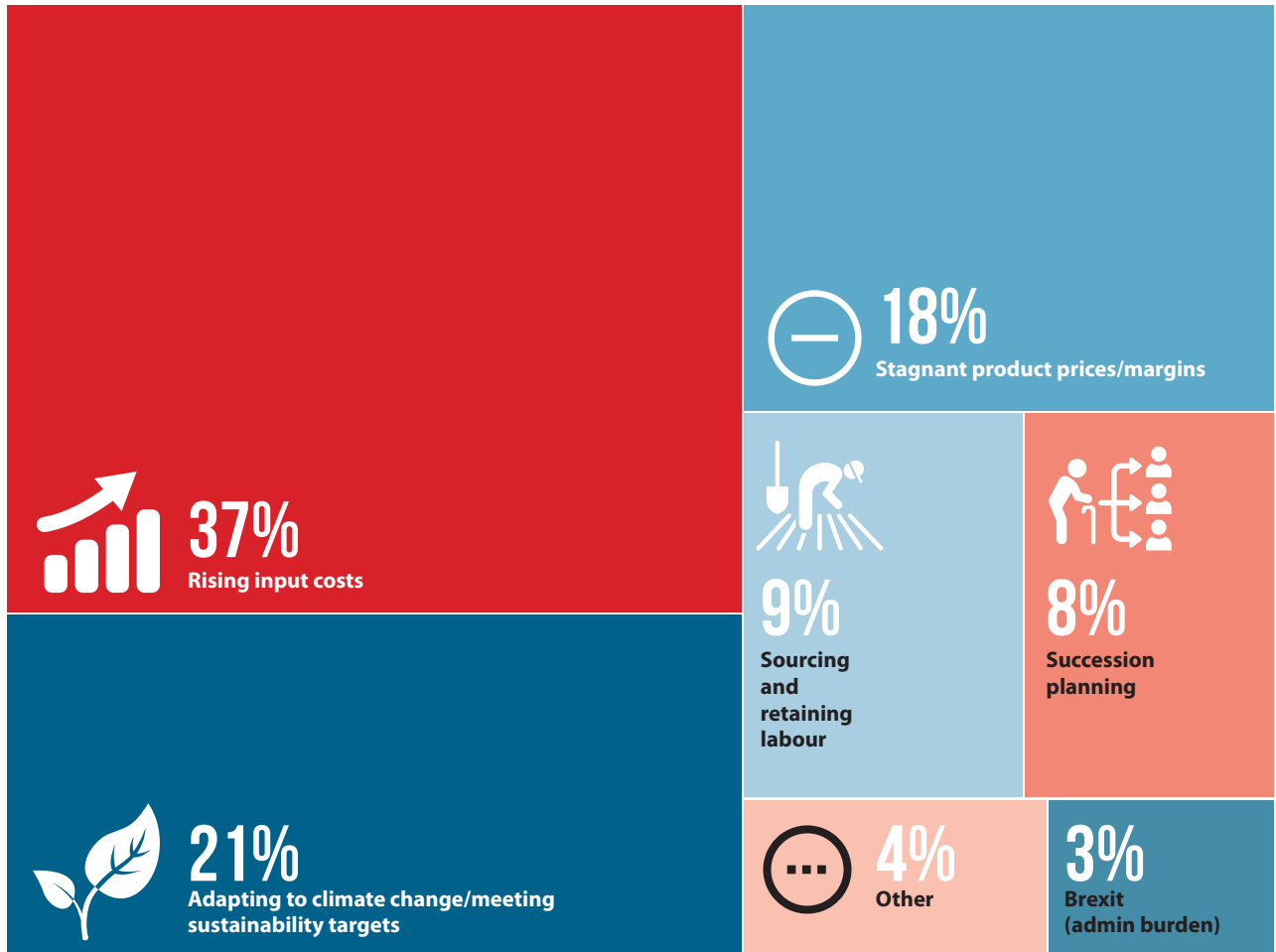


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4 THE SURVEY

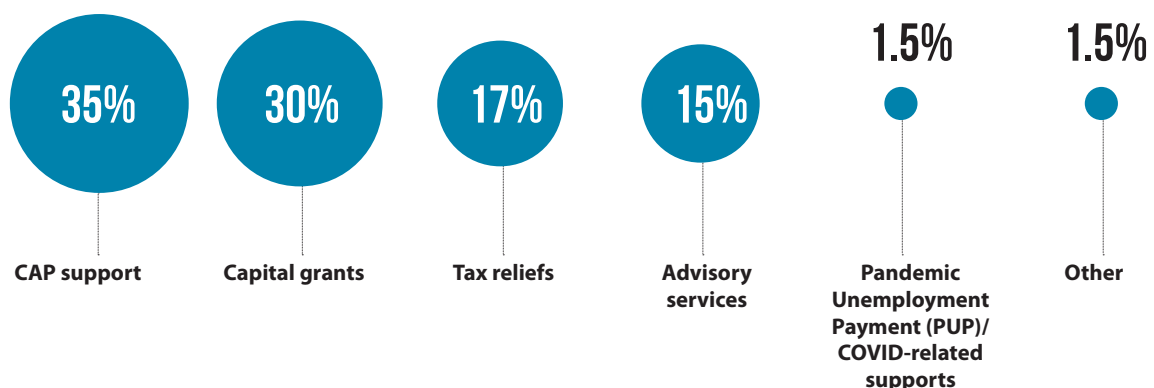
WHAT ARE THE TOP THREE BIGGEST CHALLENGES CURRENTLY AFFECTING YOUR BUSINESS?



OTHER INCLUDED:

Future loss of nitrates derogation, land rents, having policies placed on us without ANY input, TB, milk price uncertainty, work-life balance, attaining an acceptable milk yield from the herd that exceeds costs with any profits left over to reflect an 80-hour week, land fragmentation, availability and price of land, land rental costs, negative media and Department approach to farmers and farming

WHAT ARE THE TOP THREE GOVERNMENT SUPPORTS THAT COULD FURTHER SUPPORT YOUR BUSINESS IN MANAGING THE CURRENT CHALLENGES



SUGGESTIONS FOR SUPPORT

MORE CONCESSIONS FOR FOOD PRODUCTION AND MORE RELIEF FOR UNPAID FAMILY WORKERS

TAX RELIEF FOR YOUNG FARMERS TO EXPAND

PUTTING PROFITS ASIDE AND ONLY PAYING TAX ON IT WHATEVER YEAR YOU USE IT

REDUCE THE EXCISE DUTY ON FUEL

CAPITAL EXPENDITURE ON MACHINERY

VAT RELIEF LIKE ANY BUSINESS. NOT JUST ON STANDING STRUCTURE CARBON CREDIT. SPREAD PROFIT OVER INTO A BAD YEAR

TAX BACK ON PAYING TEMPORARY/CASUAL LABOUR AT PEAK TIMES OF YEAR

MAKE AGRI ENVIRONMENTAL PAYMENTS TAX FREE LIKE FORESTRY

BETTER TAX RELIEF RENEWABLE ENERGY INVESTMENT AND FAMILY FARM TRANSFER

TAX RELIEFS ON FEED AND OTHER INCOME BESIDES THE FARM INSTEAD OF GETTING TAXED MORE

GREEN ENERGY - EVERY FARM SHED COULD BE COVERED WITH PV PANELS TO COMBAT ENERGY COSTS

NO VAT IF ACTIVE FARMER TRYING TO PRODUCE CHEAP FOOD

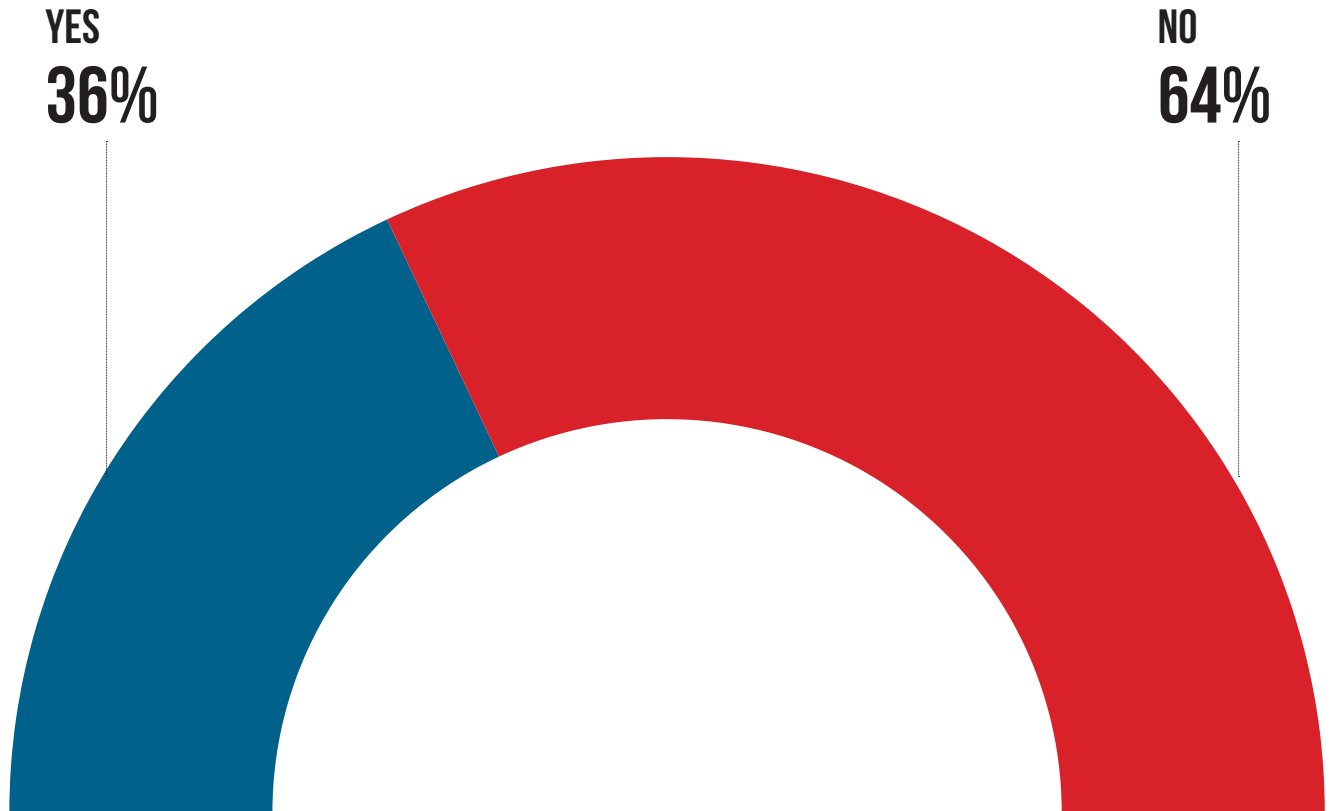
HIGHER RELIEF ON INVESTMENTS WITH OPTION TO CLAIM HIGHER PERCENTAGE RATE (50%) IN FIRST TAX YEAR AND 12.5% FOR NEXT FOUR YEARS

ACTIVE FARM FAMILIES MUST BE SUPPORTED TO BE MORE SUSTAINABLE

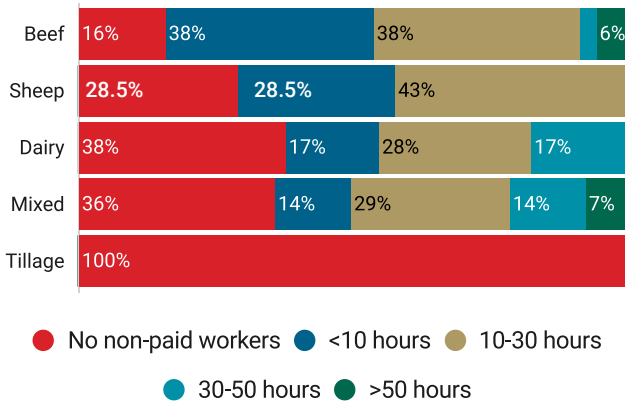
FARM BUILDINGS, EQUIPMENT, VETERINARY AND MEDICAL

ACCELERATED CAPITAL ALLOWANCES

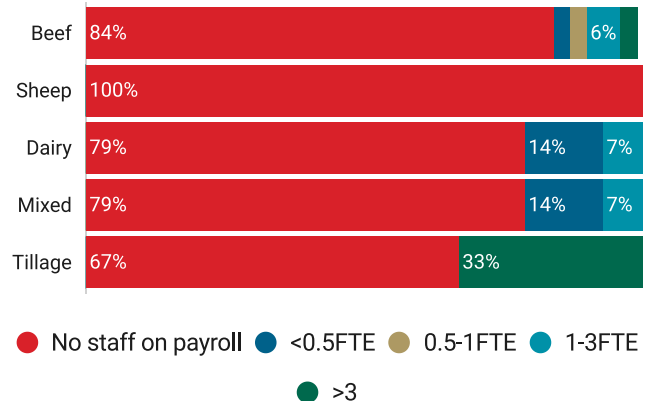
DO YOU CONSIDER CAREER OPPORTUNITIES IN AGRICULTURE TO BE SUFFICIENTLY ATTRACTIVE TO ATTRACT AND RETAIN YOUNGER PEOPLE IN YOUR AREA?



APPROXIMATELY HOW MANY HOURS NON PAID FAMILY WORKERS (EXCLUDING FARM OWNER) HELP OUT ON THE FARM IN A GIVEN WEEK?



HOW MANY FULL TIME EQUIVALENT STAFF (FTE) DO YOU HAVE ON THE PAYROLL? (1 FTE STAFF IS 37.5 HOURS OF WORK A WEEK)



SUGGESTIONS TO ENTICE MORE YOUNG PEOPLE INTO FARMING

MORE REASONABLE APPROACH TO REGULATIONS IN THE SECTOR. TOO MANY RIDICULOUS INSPECTIONS

REMOVE BELOW COST SELLING BY RETAILERS

HAVING ENOUGH MONEY IN THE BUSINESS TO PAY A GOOD WAGE AND TIME OFF. LESS THAN 50 HOUR WEEKS

PROPER WAGES AND CONDITIONS

MAKE IT VIABLE TO HAVE A DECENT LIVING

ENSURING THAT FARMERS RECEIVE A FAIRER RETURN FOR THEIR PRODUCE TO COVER THE COST OF PRODUCTION

CAN'T SEE ANY POTENTIAL FUTURE IN FARMING FOR YOUNG PEOPLE DUE TO PRICE UNPREDICTABLY, SERIOUS AGRI INFLATION AND PENAL ENVIRONMENTAL LAWS AND RULES

INCOMES ARE TOO LOW COMPARED TO OTHER SECTORS FOR THE AMOUNT OF WORK PUT IN

QUIT OVERSELLING THE FARMING CAREER TO STUDENTS. THE BOG STANDARD DONKEY WORK STILL NEEDS TO BE DONE ON FARMS. DEGREES DEF DON'T HELP FARMERS GET THAT WORK DONE

MORE EMPLOYMENT OPPORTUNITIES

GREATER SUPPORT FOR FARMERS UNDER 40. MORE TRANSPARENCY WHEN IT COMES TO SELLING STOCK TO PROCESSORS. GREAT ACCESS TO PRODUCER GROUPS

GREATER GOVERNMENT SUPPORT IN BEEF SECTOR & MONITORING OF FINANCIAL FAIR PLAY IN MEAT PROCESSORS

BETTER AGRICULTURAL TRAINING AND EDUCATION. TAX INCENTIVES TO ENCOURAGE INVESTMENT BY YOUNG PEOPLE


IF YOU MAKE A GOOD RETURN YOU WILL GET GOOD PEOPLE IN TO SECTORS, AND IT MOST GIVE YOU A PROPER WAGE. AND I AM NOT TALKING ABOUT THE MINIMUM WAGE

MORE INCENTIVES TO LEASE LAND, FOR BOTH LESSOR AND LEASEE

LESS FAVOURABLE RENTING OF LAND. PRESS RETIRED FARMERS TO SELL, NOT RENT THEIR LAND

CHALLENGES FACING THE SECTOR

Survey respondents ranked their biggest challenges, with rising input cost as the biggest concern.

1 **RIISING INPUT COSTS** 


96%
104 of 108 respondents highlighted rising input costs

“ THERE IS TOO MUCH UNCERTAINTY AROUND OUR INPUT/OUTPUT PRICES

2 **ADAPTING TO CLIMATE CHANGE/MEETING SUSTAINABILITY TARGETS** 

56%
60 of 108 respondents highlighted adapting to climate change/meeting sustainability targets

“ THE SECTOR NEEDS TO BE SUSTAINABLE BOTH FINANCIALLY AND ENVIRONMENTALLY

3 **STAGNANT PRODUCT PRICES/MARGINS** 

46%
50 of 108 respondents highlighted stagnant product prices/margins

“ FARMERS DON'T GET PAID DECENT MARGINS

4 **SOURCING AND RETAINING LABOUR** 

24%
26 of 108 respondents highlighted sourcing and retaining labour

“ GRADUATE PAY SCALES FOR THE AG SECTOR ARE THE LOWEST IN ALL OF IRELAND

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PHELIM O'NEILL

LORCAN ROCHE KELLY

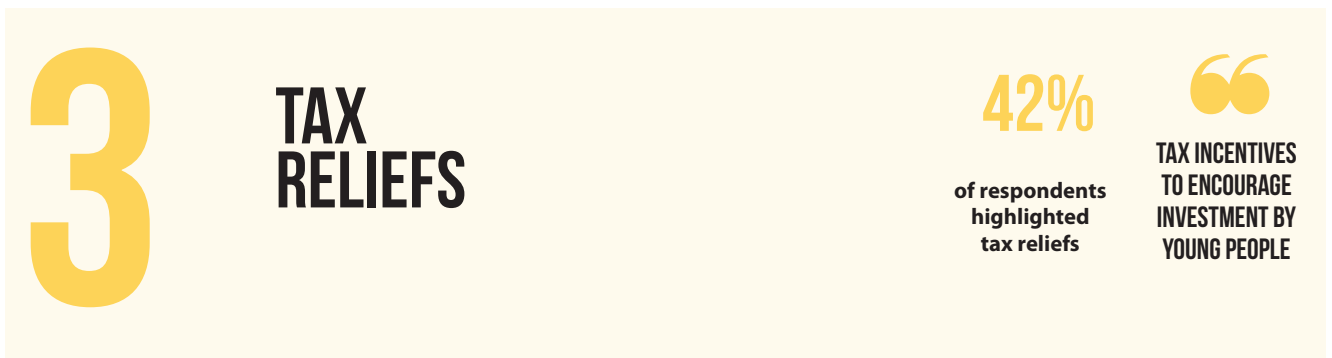
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