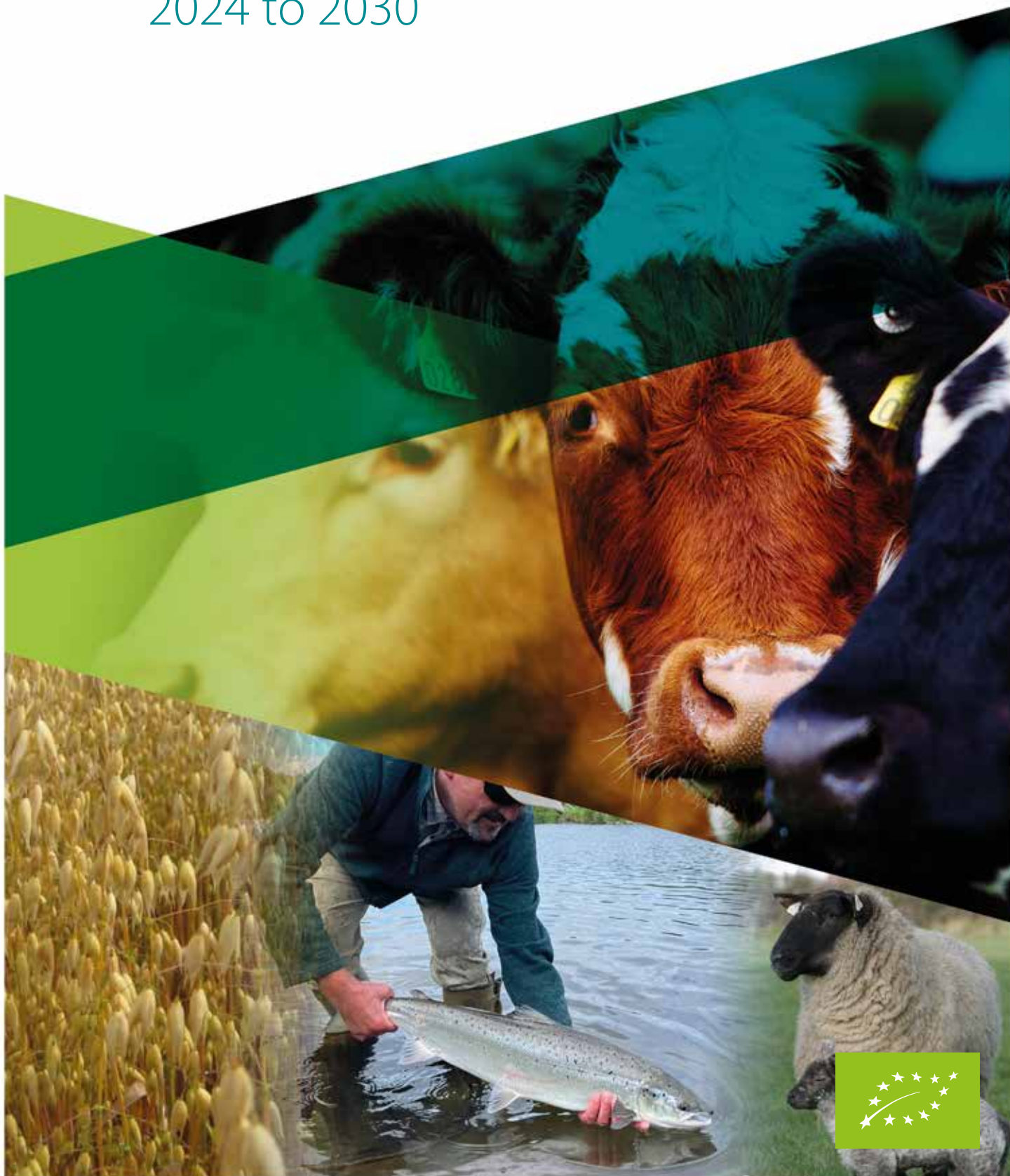




An Roinn Talmhaíochta,  
Bia agus Mara  
Department of Agriculture,  
Food and the Marine

# **NATIONAL IRISH ORGANIC STRATEGY**

## 2024 to 2030





# Table of Contents

|                      |   |
|----------------------|---|
| Foreword by Minister | 4 |
|----------------------|---|

|                   |   |
|-------------------|---|
| Executive Summary | 5 |
|-------------------|---|

## Chapter 1

|                                  |   |
|----------------------------------|---|
| Approach to Strategy Development | 9 |
|----------------------------------|---|

## Chapter 2

|                 |    |
|-----------------|----|
| Recent Progress | 11 |
|-----------------|----|

|                                                |    |
|------------------------------------------------|----|
| 2.0 Investment, Expansion and Growth of Sector | 11 |
| 2.1 Organic Trading Hub                        | 11 |
| 2.2 Organic Farm Monitoring Programme          | 11 |
| 2.3 Funding to Advisory Sector                 | 11 |
| 2.4 Sector Promotion                           | 11 |
| 2.5 Research                                   | 12 |

## Chapter 3

|                |    |
|----------------|----|
| Policy Drivers | 15 |
|----------------|----|

|                                                              |    |
|--------------------------------------------------------------|----|
| 3.0 UN Sustainable Development Goals                         | 15 |
| 3.1 European Green Deal                                      | 15 |
| 3.2 Farm to Fork Strategy                                    | 15 |
| 3.3 Food Vision 2030 and the Role of Organic                 | 15 |
| 3.4 National Strategic Plan for Sustainable Aquaculture 2030 | 16 |
| 3.5 National Strategy for Horticulture 2023-2027             | 16 |
| 3.6 Green Public Procurement                                 | 16 |
| 3.7 National Biodiversity Action Plan (NBAP)                 | 16 |
| 3.8 Climate Action Plan                                      | 16 |
| 3.9 Future Common Agricultural Policy                        | 16 |
| 3.10 Green Claims Directive                                  | 16 |

## Chapter 4

|                     |    |
|---------------------|----|
| Market Developments | 19 |
|---------------------|----|

## Chapter 5

|                                  |    |
|----------------------------------|----|
| SWOT of the Irish Organic Sector | 22 |
|----------------------------------|----|

## Chapter 6

|                  |    |
|------------------|----|
| Ambition to 2030 | 25 |
|------------------|----|

|                                         |    |
|-----------------------------------------|----|
| 6.0 Growth to 2030                      | 25 |
| 6.1 Ambitions by Category               | 25 |
| 6.2 Growing the Market for Organic Food | 27 |

## Chapter 7

|                      |    |
|----------------------|----|
| Strategic Priorities | 29 |
|----------------------|----|

|                                                 |    |
|-------------------------------------------------|----|
| 7.0 Supporting Participation in Organic Farming | 29 |
| 7.1 Co-ordinating the Value Chain               | 31 |
| 7.2 Growing the Irish Market                    | 32 |
| 7.3 Driving Export Growth                       | 35 |
| 7.4 Expanding Public Procurement                | 36 |
| 7.5 Boosting Skills & Supports                  | 37 |

## Appendices

|                                          |    |
|------------------------------------------|----|
| 1.0 Forum Membership                     | 40 |
| 1.1 List of Projects Supporting Organics | 41 |



## Strategy Purpose

The National Organic Farming & Food Strategy highlights that the sector is a central part of government policy to secure a sustainable food system that benefits farmers, food producers, local communities, consumers and the natural environment. The strategy is built around core strategic priorities with clear actions identified to drive sector growth up to 2030.

## Vision

“Grow a highly productive organic food sector that secures a viable future for farmers while supporting the health of the natural environment & consumers”



## What does success look like?

Organic is viewed by farmers, food producers and policy makers as playing an invaluable role in safeguarding the future of Ireland's agri-food sector, nurturing the natural environment and meeting evolving consumer needs. The sector contributes significant value to rural communities by delivering €750 million\* in output annually by 2030.

*\*Wholesale value*

## Foreword

I am delighted to present the National Irish Organic Strategy for 2024 to 2030, a comprehensive roadmap that will capitalise on the immense potential of the organic sector in Ireland. This strategy embodies our Programme for Government commitment to actively promote a sustainable, resilient, and prosperous organic agricultural landscape that benefits all our citizens and the environment.

The Irish Organic sector spans primary agriculture, food and drink processing and aquaculture. A key indicator of its performance as one of Ireland's fastest-growing sectors is the expansion of land farmed organically from 1.6% of land area in 2020 to approximately 5% in 2024. This growth, accompanied by a threefold increase in the number of organic farmers, underpins the sector's potential and is on target to reach 10% by 2030, as outlined in our Climate Action Plan.

At the heart of this strategy lies our ambition to increase the organic sector's value to €750 million by 2030, tripling its current wholesale value. This ambitious goal reflects not only the economic opportunities inherent in organic farming but also its vital role in promoting environmental sustainability and reducing the harmful impacts of climate change.

Organic farming, with its emphasis on quality, safety, and environmental stewardship, epitomizes Ireland's commitment to producing food of the highest standards. Our organic livestock sector, rooted in a low-cost, grass-based production system, is poised to meet the growing global demand for premium organic products.

Organic farming will continue to form a significant cornerstone of our efforts to safeguard our climate and environment through its positive impact on water quality, air quality, biodiversity and soil health. Through effective implementation of the recommendations of this strategy, Ireland will enhance its reputation as a sustainable producer of quality food and replicate the efforts of other leading countries in Europe and on the international stage.

This strategy outlines multiple priorities that will guide our efforts from driving export growth, supporting participation in organic farming to our most recently published strategy on Green Public Procurement; stipulating that a minimum of 10% of food purchased through public procurement is certified organic.

Each priority is backed by concrete actions aimed at producing tangible results for the sector. From financial support for farmers to enhanced data from the Teagasc Growing Organics programme and consumer awareness initiatives; these actions reflect our Programme for Government commitment on Organics, applying policy levers where appropriate and collaborating with wider industry.

It is my intention that this strategy also works in tandem with broader policy frameworks such as the EU Green Deal, Food Vision 2030 and the National Biodiversity Action Plan. I commend the collaborative efforts of all stakeholders involved in shaping this strategy, from farmers and growers to processors and policymakers and members of the public. It is by working in partnership together that we can realise the full potential of the organic sector and build a more sustainable future for Ireland.

**Minister Pippa Hackett**

*Minister of State for Land Use and Biodiversity in the Department of Agriculture, Food and the Marine*

# Executive Summary

The Irish organic sector represents a diverse range and scale, spanning agriculture, food and drink processing, fisheries, aquaculture, and fish processing. There has been rapid growth in the past 3 years, with the land area expanding from 1.6% in 2020 to approximately 5% presently, accompanied by a threefold increase in organic farming numbers. Valued at around €200 million wholesale, the organic sector aims to surpass €750 million by 2030. Renowned for its quality and safety standards, Ireland's organic livestock production has the natural advantage of a cost-effective grass-based system, perfectly suited for organic farming. As global demand for high-quality organic food increases, Ireland is well positioned to cater for this growing demand. Organic farming plays a key role in environmental protection and soil health, with a target set to cover 10% of Ireland's land area by 2030 which will enhance the nation's standing as a sustainable food producer and supplier of top quality food.

## Key Priorities:



### 1. Supporting Organic Farming Participation:

- Provide financial and technical assistance to encourage participation in organic farming.
- Facilitate access to land and resources for aspiring organic farmers.
- Implement initiatives to attract young farmers into the organic sector.



### 2. Coordinating the Value Chain:

- Strengthen connections between farmers and processors to streamline operations.
- Expand processing networks to accommodate the growing organic sector.
- Shorten supply chains to optimise efficiency.
- Increase distribution capacity to meet rising demand.



### 3. Growing the Domestic Market:

- Conduct market research to understand consumer preferences and needs.
- Clarify the benefits of organic food to consumers through targeted campaigns.
- Raise awareness and preference for Irish organic products among the domestic population.



### 4. Driving Export Growth:

- Gain insights into market trends to capitalise on export opportunities.
- Promote Irish organic food in international markets, leveraging its reputation for quality and safety.
- Highlight the environmental credentials of Irish organic food to appeal to eco-conscious consumers abroad.
- Support exporters in accessing new markets through trade agreements and initiatives.
- Explore the opportunities around labelling to maximise the visibility and credibility of Irish organic products in foreign markets.



### 5. Expanding Public Procurement:

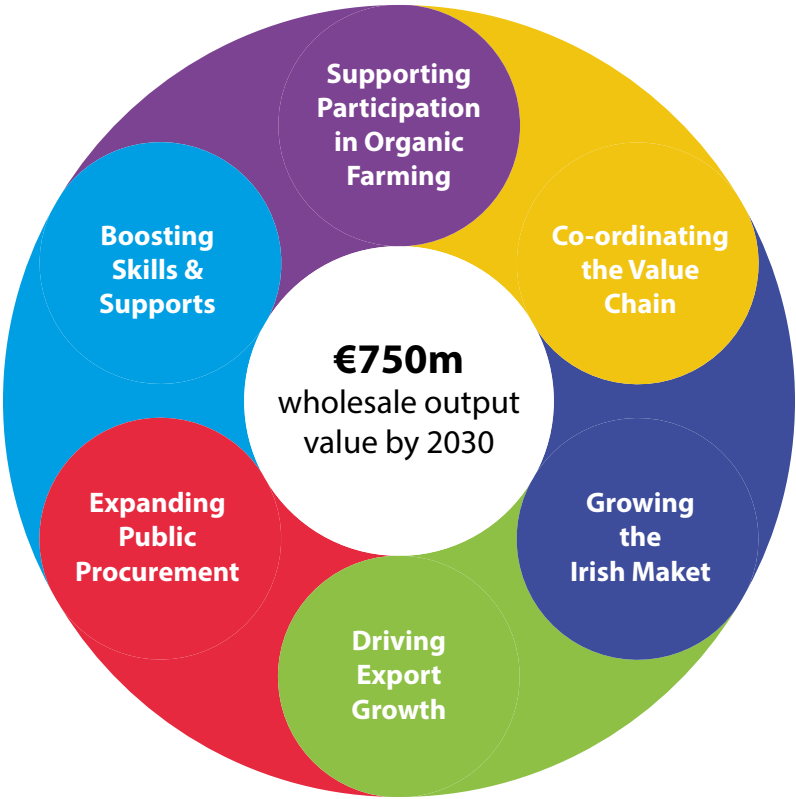
- Support the new clear guidelines for green public procurement to prioritise organic products.
- Promote the availability and appeal of Irish organic produce in public institutions and facilities.



### 6. Boosting Skills and Support:

- Facilitate knowledge exchange among organic farmers to share best practices and innovations.
- Implement education and training programs to enhance skills and expertise in organic farming.
- Encourage research and development initiatives to drive innovation and sustainability in the organic sector.
- Foster collaboration among industry stakeholders to address common challenges and opportunities.
- Strengthen networking platforms to facilitate communication and cooperation within the organic sector.
- Enhance the business capability of the organic sector through capacity-building initiatives and support services.

This National Organic Strategy outlines key priorities aimed at fostering the growth and sustainability of the organic sector in Ireland. By addressing these priorities, we aim to achieve economic, social, and environmental sustainability within a holistic Food Systems approach. Through concerted efforts and collaborative initiatives, we can harness the potential of the organic sector to contribute positively to Ireland's economy, environment, and society.







# Approach to Strategy Development

The approach to developing the Organic Farming and Food strategy involved the following elements:

- A review of the actions identified in the National Organic Strategy, 2019 – 2025
- Public consultation process
- Individual and collective input of Forum members.

The strategy aims to align with Food Vision 2030 and outlines the role of organic farming and food production in securing a sustainable food system by delivering environmental, economic and social benefits. The strategy aims to deliver a viable, competitive and resilient business opportunity for organic primary producers and other stakeholders along the supply chain to encourage long-term investment in the sector.

It reflects the needs identified during the engagement process with forum members and stakeholders combined with the submissions received during the public consultation process.

This strategy is set against a policy backdrop guided by the EU Green Deal. The EU Farm to Fork Strategy is at the heart of the Green Deal and sets an ambition for 25% of EU agricultural land being farmed organically by 2030.

This strategy provides the roadmap for organic farming and food production to play an enhanced role in driving the move towards a resilient, sustainable, and ecologically responsible agricultural sector in Ireland. It is guided by the following core principles:

- 1. Environmental Stewardship:** Protect and rejuvenate our natural resources through the implementation of practices that regenerate the land, reduce carbon emissions, and contribute to our climate resilience.

- 2. Biodiversity Conservation:** Protect and enhance biodiversity by supporting a balance between agriculture and the natural world and conserving our precious native species.

- 3. Consumer Choice:** Empower consumers with information about the potential benefits of organic food in providing safe, nutritious, and locally produced food that meets high animal welfare standards.

- 4. Community Empowerment:** Organic farming can play a key role in preserving rural communities, provide economic opportunities and foster a sense of pride and ownership among our farmers.

- 5. Research and Innovation:** Sustained investment in research and innovation to support the adoption of organic farming practices by ensuring farmers have access to the latest knowledge and technology. Innovation at the processing level in areas such as zero waste processing as well driving value added developments in relation to organic food & feed products will be encouraged.

Working with our farmers, growers, communities and stakeholders, the strategy aims to nurture the positive growth of the organic sector. It sets out the ambition for the organic sector and outlines the priorities to deliver this over the period to 2030.

An in-depth implementation plan has been developed to bring accountability to the delivery of identified actions for each strategic priority. The implementation plan will ensure relevant actions are delivered across each sub-sector.



## Recent Progress

A review of the 2019 - 2025 Organic Food Sector and Strategy shows that the substantial majority of actions have been successfully delivered and have helped deliver a renewed focus on organic farming. A number of ongoing actions are included in this strategy with particular focus needed on growing the organic horticulture sector.

There has been a considerable emphasis on assisting existing and new farmers, growers and processors to increase their capabilities, grow their understanding of market and consumer trends and increasing consumer awareness of Irish organic food.

Substantial progress has been made in putting infrastructure in place that can act as a platform for significant growth in the organic sector. The following pages outline in more detail some of the main initiatives that have been delivered as part of the current strategy.

### 2.0 Investment, Expansion and Growth of Sector

Under the new CAP (2023-2027), a budget of €256 million has been secured to drive the development of the organic sector, which represents a fivefold increase on the previous CAP.

This allocation facilitates enhanced payment rates to assist in the maintenance and conversion to Organic Farming.

A standalone Division was established within DAFM in 2022 to promote and develop the organic sector.

The 2024 Organic Farming Scheme budget amounts to €62 million, an approx 300% increase on 2022.

The Targeted Agricultural Modernisation Scheme (TAMS 3) has an expanded list of fixed and mobile Investment items under the Organic Capital Investment Scheme at an increased grant rate of 60%.

The Organic Processors Investment Grant continued in 2024 with a budget of €3 million and an increased grant rate of 60%.

### 2.1 Organic Trading Hub

The need for a dedicated resource for Certified Organic Operators to trade with each other was identified by the Forum in 2022. This led to the development and launch of an online Organic Trading Hub in September 2023.

The Hub represents an important part of the infrastructure to support the growing number of farmers in the sector.

The aim is to expand the scope of the Hub to deliver a one-stop shop for all resources and supports available for organic farmers and food producers.

### 2.2 Organic Farm Monitoring Programme

The 'Growing Organics' Programme, led by Teagasc, is now in its second year and promotes the adoption of best practice at farm level to increase the future viability and sustainability of the Irish organic sector.

12 Organic demonstration farms have been selected across the country to illustrate best practice and monitor key financial and environmental metrics over a five-year period. These farms will serve as living laboratories for studying the impacts of organic practices over time.

The results of activities undertaken on these farms will be made available to all farmers and researchers to significantly enhance data on different aspects of organic farming, including economic performance.

This programme is being supplemented by a significantly enhanced team of specialist organic advisors by Teagasc to drive best practice and knowledge exchange at farm level.

### 2.3 Funding to Advisory Sector

In addition to the increased number of Teagasc organic advisors, DAFM has invested €225,000 since 2022 in continuing to upskill Agricultural Consultants Association (ACA) advisors in organic farming.

In 2022 over 100 ACA advisors attended training. Increased funding in 2023 meant the provision of 2 organic specialist advisors and the hosting of successful farm walks, which proved very effective in assisting record numbers of farmers in their switch to organic farming.

A further €150,000 has been allocated for 2024 to continue this important work.

### 2.4 Sector Promotion

In 2023 €1.5m was secured under Brexit Adjustment Reserve (BAR) funding towards the development and delivery of marketing development activities.

A Bord Bia led €1.2 million national marketing campaign was launched in Autumn 2023 to promote Irish organic food, drink and horticulture to domestic consumers and help grow awareness and understanding of the benefits offered by Irish organic food.

In addition, Bord Bia secured EU funding for a 3-year promotional programme for pasture fed organic beef and lamb across four European markets. This will see a €2.7 million campaign delivered over the 2024 to 2026 period.

An open call for Organic projects to promote the organic sector closed in August 2023. There were over 30 detailed projects submitted and 12 were selected with funding of €1.1 million provided. Details of the 12 successful projects are listed in Appendix B.

## 2.5 Research

The rollout of a new research project Growing Resilient Organic Farming Systems (GROFarmS). This project represents

a collaboration between Teagasc and UCD and will undertake:

- Beef Production Research Trials
- Sheep Finishing Research Trials
- Organic beef finishing demonstration farm.
- Benchmarking the financial, social and environmental sustainability of organic farms

A total of €1.3 million in funding was allocated by DAFM and Teagasc in 2023.







## Policy Drivers

This strategy is set against a backdrop of significant policy developments at an international, EU and national level that will significantly influence the future direction of the agriculture sector.

### 3.0 UN Sustainable Development Goals

The UN Sustainable Development Goals set out a vision and blueprint for a safer, fairer, more prosperous and sustainable world. Of the seventeen SDG's, nearly all link either directly or indirectly to the food system. Organic Farming embodies several of the UN's Sustainable Development Goals including:

- Zero hunger
- Good health and well-being
- Climate action
- Life below water
- Life on land

### 3.1 European Green Deal

EU countries are committed to achieving climate neutrality by 2050, delivering on the commitments under the Paris Agreement. The European Green Deal is the EU's strategy for reaching the 2050 goal.

### 3.2 Farm to Fork Strategy

Implementation of the Green Deal for agriculture is through the EU's Farm to Fork strategy, which aims to achieve climate neutrality by driving the development of a sustainable food system. In addition to food security and safety, the strategy's main goals are to:

- Ensure sufficient, affordable and nutritious food within planetary limits.
- Support sustainable food production.
- Promote more sustainable food consumption and healthy diets.

In October 2020, the EU Council adopted a set of conclusions on the strategy, endorsing the goal of developing a European sustainable food system.

### 3.3 Food Vision 2030 and the role of Organic

Food Vision 2030 is Ireland's stakeholder-led strategy for the agri-food sector. Using a food systems approach, Food Vision 2030 aims to transform the agriculture, food, forestry, and

marine sectors by charting a pathway to sustainability in all its dimensions – environmental, economic, and social – that can position Ireland as “A World Leader in Sustainable Food Systems”.

Food Vision recognises that organic farming can make a valuable contribution to primary producer viability while helping to meet the ambition of the agri-food sector to becoming climate neutral by 2050 and offering additional co-benefits for water & air quality and biodiversity.

Food Vision aims to support the organic sector to achieve at least 7.5% of Utilisable Agricultural Area under organic production. It recognises the need to take on board the three axes identified in the EU Organic Action Plan in terms of boosting consumption, increasing production, and improving the sustainability of the sector.

Food Vision is focused on four key missions, namely:

1. A climate smart, environmentally sustainable agri-food sector.
2. Viable and resilient primary producers with enhanced wellbeing.
3. Food which is safe, nutritious and appealing. Trusted and valued at home and abroad.
4. An innovative, competitive and resilient agri-food sector, driven by technology and talent.

The Organic Food Sector can be a key contributor to delivering on these as follows:

- 1. Expansion in Organic Farming:** Food Vision 2030 proposes an expansion in the tillage, horticulture, and organic farming sectors to help drive the diversification of Irish agriculture.
- 2. Focus on Carbon-Efficient Agriculture:** Organic farming offers the potential to reduce the environmental footprint of the sector by contributing positively to water & air quality and biodiversity.
- 3. Development of High-Value Organic Outputs:** Food Vision 2030 is strongly focused on innovation to deliver high value output and highlights the potential for a broader range of organic products.
- 4. Soil Management and Technology Investment:** Organic farming can contribute positively to soil health, nutrient-use efficiency and the development of effective pesticide-management techniques.
- 5. Expansion of Horticulture:** Recognising horticulture's small footprint in Ireland, Food Vision 2030 aims

to expand this sector, contributing to achieving a climate-neutral sector by 2050. Organic horticulture provides potential to increase the number of growers in the sector and help boost returns.

### 3.4 National Strategic Plan for Sustainable Aquaculture 2030

Ireland's National Strategic Plan for Sustainable Aquaculture Development focuses strongly on providing the infrastructure and supports to grow organic output in the period to 2030.

Organic aquaculture production is composed of two main species, Atlantic salmon and mussels. In 2021, 12,844 tonnes of salmon were produced to organic standards (down from 20,000 tonnes of salmon in 2017) and 7,500 tonnes of mussels.

Growth ambitions remain for the period to 2030, albeit with challenges in relation to inshore sites.

### 3.5 National Strategy for Horticulture 2023 to 2027

The National Strategy for Horticulture 2023-2027, while focusing on the broader horticulture sector, has implications for organic horticulture output. Key aspects of the strategy that could positively impact organic horticulture include:

- Strengthening the Position of the Grower
- Development of a Growers-Retailers Charter
- Research and Development
- Strengthening education opportunities
- Integration into the Agricultural Knowledge and Innovation System
- Support for Innovation and Diversification

The implementation of the horticulture strategy, which is focused on effective policy-making, strong leadership, and industry collaboration, could lead to a significant increase in the farm gate value of the horticulture sector, benefiting both conventional and organic growers.

The legislative requirements to register with DAFM as a food business operator and apply for the Basic Income Support for Sustainability Scheme annually were explained at a workshop for growers in February 2024. There will be an enhanced focus on how the flow of information between DAFM and growers can be improved.

### 3.6 Green Public Procurement

Green Public Procurement, or GPP, is widely recognised as a vital policy lever to achieving environmental objectives. Large purchasing power gives the public sector significant influence to stimulate the creation and provision of more resource-efficient, less polluting goods, services and works within the marketplace.

The Green Public Procurement Strategy and Action Plan published in April 2024 stipulates that a minimum of 10% of food purchased via public procurement must be certified organic. The Strategy also provides that the level of seasonal products included should be key criterion in public sector food procurement.

### 3.7 National Biodiversity Action Plan (NBAP)

The NBAP recognises the importance of organic farming to the conservation of biodiversity and ecosystem services in the wider countryside and includes as an action that DAFM and other stakeholders will support farmers to transition to organic farming.

### 3.8 Climate Action Plan

Organic farming is a major component of the Climate Action Plan, with a target of 10% of utilisable agricultural area by 2030. The potential of organic farming to contribute to a reduction the agriculture sector's overall GHG emissions is recognised, with conversion to organic farming noted as a key diversification option for farmers.

### 3.9 Future Common Agricultural Policy

It is important that progress made in the existing CAP regarding enhanced payments rates for farmers and the positive positioning of organic are maintained when policy is being developed.

### 3.10 Green Claims Directive

Consumers are faced with a wealth of claims on the 'green' nature of products. In 2023, the European Commission put forward a proposal for a Directive on green claims. It is expected that the proposed Directive would require companies to substantiate voluntary green claims they make from 1 January 2025. Being organically certified is accepted as providing valid green credentials.





## Market Developments

During the first half of 2023, 2,500 Irish shoppers participated in Organic sector research led by Bord Bia. This research looked at the future drivers for the organic category in Ireland and informs the key messaging and positioning for Irish organics. Nearly 1 in 2 shoppers are buying some organic products on a weekly basis.

Notwithstanding the short-term challenges being faced by the organic sector in response to unprecedented cost of living pressures being faced by European consumers, the medium-term prospects for the organic category remain positive across Europe.

The value of the organic retail sector in key markets such as Germany, France and the Nordics remain 30% - 40% ahead of 2018 levels. The value of retail sales of organic food at retail level across Europe was valued at more than €53 billion in 2022. The retail market for organic food across Europe more than doubled in size over the 2013 to 2022, representing annual growth of more than €25 billion.

The EU's Farm to Fork strategy sets out the ambition to have 25% of the EU's agricultural land farm organically by 2030. This compares to 10% in 2022. The further growth in organic farming across Europe will help increase food availability, drive an increase in market size and help continue the trend of organic food becoming more mainstream with consumers across the region. It is likely the European retail market for organic food will exceed €65 billion by 2030.

It's interesting to note that almost 20% of new product launches across Europe contain an organic claim, which highlights how mainstream the category has become.

Organic products in Europe are sold through various channels, including supermarkets, specialty organic stores, farmers' markets, and online platforms. Supermarkets and large retail chains are increasingly expanding their organic offerings, which intensifies competition for specialty stores and smaller producers. Private label ranges are also increasingly prevalent and tend to offer more competitive pricing.

The European organic market features a wide range of products, including fresh produce, dairy, meat and poultry, seafood, bakery, confectionery and prepared foods.

While organic products are generally priced higher than conventional products, there is significant price competition within the organic sector as brands and retailers strive to make organic products more affordable, while maintaining a premium position.

The growth in the European market is being driven by a growing consumer preference for natural and sustainable food products. Some of the key drivers of growth in the organic food category in the period to 2030 include:

- 1. Environmental concerns:** Consumers are increasingly seeking products with low environmental impact, which is leading to higher consideration of organic products.
- 2. Health Consciousness:** Consumers are becoming more health-conscious and seeking foods perceived as healthier and free from synthetic chemicals. Many believe that organic produce is healthier due to the absence of synthetic pesticides.
- 3. Nutritional Benefits:** Some studies suggest that organic produce may have higher nutrient levels, which can attract consumers seeking greater nutritional value in their food.
- 4. Non-GMO:** A desire for non-GMO food products is helping to drive demand for organic produce, which by definition excludes genetically modified organisms.
- 5. Better Consumer Understanding of Organic:** Ongoing efforts to educate European consumers about the benefits of organic produce have contributed to increased demand with organic becoming mainstream in more developed markets on the Continent.
- 6. Certification and Standards:** The EU organic logo and national organic labels play a significant role in driving consumer trust. This reflects the fact that the organic label applied to products must comply with EU legislative requirements and can only be used on products that have been certified as organic by an Organic Control Body. This provides reassurance to consumers that strict controls are in place.
- 7. Local and Small-Scale Farming:** Consumers often associate organic farming with local and small-scale operations, which appeals to those interested in supporting local communities and reducing food miles.
- 8. Community Initiatives:** Community-based initiatives like organic community gardens and farm-to-table programmes help in creating a sense of community around organic food consumption.

The scale of organic food imports continues to grow across Europe according to Zenith analysis for Bord Bia. This put the value of imports at over €5 billion in 2021 across the UK and seven major European markets.

The share of organic demand supplied by imports varies by country and category. It is highest in the UK, Germany and Austria where more than 20% of demand for organic food is met by imports, led by cereals, fresh produce & seafood.

Future growth is expected to span a range of product categories including meat, dairy, seafood and prepared foods. The Zenith analysis suggests the strongest growth

opportunities exist for meat, dairy and cereals with local supplies struggling to meet demand in most markets.

The organic food market in Europe will remain competitive, which highlights the need for suppliers to positively differentiate their products. The anticipated growth will provide an opportunity for Ireland provided we can ensure consistent availability of supplies and offer a clear marketing proposition to justify a premium positioning. It will also be important that any regulatory challenges are proactively addressed.





## SWOT of the Irish Organic Sector

The future development of the organic food sector in Ireland will be boosted by a growing market demand in Ireland and across Europe. Availing of opportunities as they arise will require a co-ordinated approach by all involved in the sector to build on the strengths of the sector and address barriers to growth.

The following table summarises the strengths, weaknesses, opportunities and threats of the organic sector.

### S STRENGTHS

- » Absence of synthetic chemicals and pesticides in production system.
- » High level of environmental sustainability and animal welfare in line with Irelands Animal Health Strategy.
- » Grass based livestock system working with natural cycles.
- » Strong national organic standards that are robustly implemented and provide a platform for consumer trust.
- » Professional and proactive certification bodies and support organisations.
- » Method of farming which encourages and fosters new ideas and innovations.
- » Increased range of national supports for the sector.
- » Increased resources for training, technical advice and guidance for new entrants.

### O OPPORTUNITIES

- » Increasing consumer demand for organic products in Ireland and across Europe.
- » Positive positioning of organic in terms of addressing environmental and health issues.
- » Growing import demand for broad range of organic products across Europe.
- » More openness among farmers to consider organic farming.
- » Potential for increased income at farm level through lower costs of production, innovative production techniques, higher market prices and increased supports.
- » Potential for organic food to benefit from Ireland's existing reputation in export markets as a high-quality food producer.
- » Dedicated EU promotional funding of €42m to promote the Green Leaf with Bord Bia successfully applying for a €2.7m programme to promote organic beef and lamb across four European markets over 2024 – 2026 period.
- » Increased Public Procurement opportunities for organic produce.
- » Potential to further develop short supply chains to grow sales of organic products to Irish consumers.
- » Greater focus on diversification provides an opportunity to attract young farmers to the sector.
- » Opportunity to avail of funding such as the Rural Innovation and Development Fund (RIDF) Call for Proposals: Agri-Food Tourism measure
- » Opportunity to develop biobased products, i.e. producing feed from organic grasslands and seaweed producing animal feed, biobased chemicals and biochar.

Overcoming the value chain challenges highlighted below is key to delivering on the ambitions of this strategy. This informs our strategic priorities, which seek to address issues such as co-ordination of supplies, the business case for organic, knowledge exchange, growing the processor base, providing greater market certainty, educating consumers and growing exports.

# W

## WEAKNESSES

- » Sector remains niche and fragmented in many cases, which can result in additional transport and processing costs relative to conventional.
- » Limited value chain co-ordination with leakage of produce to conventional in some sectors, most notably livestock.
- » Weak links between producers, which can lead to sense of isolation and limits trading of inputs and outputs. Disconnect between store livestock producers and finishers.
- » Limited data availability on supply pipeline, which can impact negatively on additional processors entering the sector.
- » Limited detail on the business case for organic farming.
- » Mixed consumer understanding of the benefits of organic food.
- » Relatively low, albeit growing, awareness of the EU Leaf among Irish consumers.
- » Challenges in relation to availability and the costs associated with organic feed, reflecting the absence of an organic feed mill.

# T

## THREATS

- » Limited number of processors in the sector can create some uncertainty regarding the market for organic produce.
- » Mixed visibility of Irish organic products in-store creates a challenge in driving consumer interest in the category.
- » Distribution challenges faced by smaller suppliers when supplying the multiple retail, independent stores, foodservice and the hospitality sector.
- » Challenging for organic to clearly differentiate itself from other product claims such as free range, environmentally friendly and “free from”.
- » Increasingly competitive marketplace across Europe as organic becomes more mainstream.
- » Variable knowledge among new entrants on the practices that can optimise productivity at farm level.
- » Lingering negative perception of organic farming among some farmers and stakeholders.



## Ambition to 2030

### 6.0 Growth to 2030

The strategy also points to the opportunities for diversification and innovation including in ingredient powders and Medicinal Aromatic Plants and waste valorisation. Renewed focus on research and development in this sector will also benefit growers.

The ambition to increase the area of organically farmed land forms a core part of the Climate Action Plan/Mitigation Plan with a target to increase the area of organic production to 10% or approximately 450,000 hectares by end of decade. This represents one of the key actions to deliver a reduction of 25% in greenhouse gas emissions from agriculture by 2030.

Organic farming can play an important role in reducing nitrous oxide through the reduced use of chemical nitrogen while lower stocking levels can contribute positively to reducing overall greenhouse gas emissions. Organic shellfish aquaculture can contribute towards carbon capture while both organic finfish and shellfish are relatively low carbon forms of protein.

This strategy is focused on ensuring that the value of output from this land area is optimised. The ambition is to reach a wholesale output value for the organic sector of €750 million by 2030. This would represent a fourfold increase on 2022 levels.



### 6.1 Ambitions by Category

The substantial increase in the number of farmers/growers participating in the Organic Farming Scheme (OFS) provides a platform for significant growth in output over the lifetime of this strategy.

New applications for the OFS in 2022 and 2023 approached 3,500 farmers and growers, which will result in more than 225,000 hectares being farmed organically. This equates to 5% of agricultural land area.

To date applications for the OFS have been dominated by

livestock farms, which have accounted for more than 85% of applications. Increasing number of tillage farmers have also joined the scheme, equating to around 5% of the total. Dairy farms represent around 2% of applications, horticulture less than 1% with the balance consisting of mixed enterprises.

The following trends are anticipated by subcategory:



Significant growth is anticipated in livestock output over the lifetime of this strategy. Two key drivers will dictate developments, namely the number & scale of farms and the level of leakage to conventional.



Based on the assumption that leakage is reduced to less than 10% by 2030 and that cattle numbers on organic farms treble over the period, it is projected that organic beef output will exceed 12,000 tonnes. This would represent more than a threefold increase relative to 2022.



Addressing the challenge of leakage in the sheepmeat sector will be a key focus for the period of this strategy. Estimates for 2022 suggest that leakage to conventional remained at around 70%. Reducing this figure will require strengthened linkages between store lamb producers and farms to finish lambs. A co-ordinated approach to improving the quality of lambs coming from upland areas to ensure they meet market specifications will be critical to growing volumes.

Based on the assumption that leakage levels can be reduced to less than 50% by 2030 and the numbers of sheep on organic farms shows a fourfold increase, it is projected that lamb output will approach 3,000 tonnes. This compares to less than 500 tonnes in 2022. In addition, considerable potential exists to grow the value of organic wool output over the period.



While dairy farms remain a relatively small proportion of farms converting to organic, further growth is expected in the period to 2030. Key to growing the sector will be increased information on the business case for organic dairy farming, including market certainty for producers in relation to demand for organic milk and dairy products.

Based on the assumption of positive demand for organic milk for processing and increased processing capacity, it is projected that organic milk output could double by 2030 to around 40 million litres annually.

The key focus for the period will be growing the output of value added dairy products such as cheese, yoghurt, butter and powders as exports become more important in order to deliver positive returns for processors and farmers. This will require investment support to drive innovation and enhance the availability of shared facilities for smaller producers.



### POULTRY

Organic poultry output continues to be dominated by eggs. Organic eggs currently hold a 4% market share in the Irish retail market. Notwithstanding the significant profitability pressure and disease uncertainty since 2022, the sector is expected to return to growth over the medium term. It is projected that more than 53 million organic eggs will be produced annually by 2030, representing a rise of 50% relative to 2022.

In addition, there is potential to grow the output of organic broilers and turkeys, albeit from a small base.



### PORK

Organic pork output remains very small currently. However, potential exists to grow the sector in the period to 2030 to meet demand in the hospitality sector. Opportunities also exist to increase sales through direct to consumer channels.



### TILLAGE

Significant potential exists to grow organic tillage output, most notably for oats but with growth also expected in other crops such as wheat, barley and pulses. Tillage area is expected to more than double by 2030 relative to 2022 with volumes increasing accordingly. This would leave oats output standing at around 18,000 tonnes.

DAFM undertook a survey of organic farmers in January 2024 and results indicate a demand for 20,000 tonnes of “straights” and 33,500 tonnes of organic concentrates for winter 2024-2025. The continuing growth of the sector offers opportunities to expand the tillage area as envisioned in Food Vision 2030.



### HORTICULTURE

The National Strategy for Horticulture 2023-2027 points to the greater climate vulnerability of countries that grow at scale. Fresh produce imports will always be an important part of supply due to our relatively short growing season and consumer desire for a large variety of out of season produce but concerns around food security issues have highlighted the importance of a strong domestic horticulture sector.

Quantifying organic fresh produce production is challenged by the limited availability of data. However, considerable potential for growth exists given the expected increase in demand on the Irish market for organic fruit and vegetables.



With imports currently accounting for around 70% of retail sales in Ireland, potential also exists to increase self-sufficiency through local in season crops suitable for Irish growing conditions. Easier access to retail distribution could play a key role in growing output and sales.

Based on the assumption of the sector being successful in reducing reliance on imports to less than 50% and increased numbers of growers that can access the retail sector on a local/regional basis, the output of organic fresh produce could treble by 2030.

In line with national horticulture strategy, the implementation of this strategy will focus on improving routes to market, encouraging value-added innovation and explore bioeconomy opportunities. Detailed, accurate information is needed about production by small growers. The Organic Growers of Ireland will be an important source of this information.



## AQUACULTURE

Organic products currently account for almost 4% of total aquaculture in Europe. Ireland is by far the leading producer of organic aquaculture species with an EU production share of 42%, followed by Italy (16%) and France (8%).

European aquaculture has seen very positive growth since 2012, especially for salmon, trout, seabass, seabream, mussels and oysters. Although no specific targets are outlined in the national strategic plan for sustainable aquaculture development 2030, the scope for future growth of the organic aquaculture sector is recognised by all stakeholders.



## Assumptions behind growth projections

The assumptions and data sources utilised to develop the projections outlined above are as follows:

- Ambition to have 10% of land area farmed organically by 2030 is achieved
- 8,500 farms in the OFS by 2030
- 45% of new entrants to OFS are cattle farms
- A similar proportion consist of sheep farms
- Leakage levels of 10% for cattle and less than 50% for lamb by 2028
- Stock numbers on new entrant farms are marginally lower than 2020 – 2022 entrants
- Average wholesale prices remain 30% ahead of 2021 levels by 2030.

Detailed data availability remains a challenge for many sub categories. As a result, the data used to quantify output consisted of a combination of data from OFS applications and industry information.

## 6.2 Growing the market for organic food

Growing market demand will be critical to driving the value generated for Irish organic food and ensuring the sustained viability of the sector. The Irish market will remain critical for many sub categories and continue to absorb over 50% of total organic food output in value terms.

Driving market growth in Ireland will require strong support for Irish organic food by Irish retailers, foodservice companies and public procurement. In addition, ongoing national supports to grow short supply chains have a valuable role to play in optimising the value generated.

Export markets will become increasingly important for many sub categories, most notably meat, dairy, seafood and cereals. By 2030 exports are anticipated to deliver almost 50% of the value of the overall sector. Delivering on this will require a sustained programme of market development to grow awareness of Irish organic food and position it positively with targeted customers across Europe and beyond.

To ensure the strategy remains on track to deliver on the ambitions set out above, there will be a six-monthly review of progress by the Organic Strategy Forum against an agreed set of KPI's for each strategic priority. The final output of this review will be published online.



## Strategic Priorities

Delivering on this ambition will require a renewed, innovative focus to deliver progress across a core group of strategic priorities.

This document outlines the job to be done in relation to each strategic priority and highlights the role of various stakeholders to ensure strong delivery.

### 7.0 Supporting Participation in Organic Farming

Growing participation in organic farming and food production is essential to delivering on the ambition for the sector.

The inclusion of organic farming as a core part of the national Climate Action Plan represents a positive recognition of the role the sector can play in securing a sustainable food system in Ireland.

Positioning organic farming as a central part of government policy and stakeholder strategies such as Food Vision is important to ensure a cross cutting approach to delivering the supports needed to grow participation, improve infrastructure and educate consumers. Organic farming and food production needs to be recognised in agriculture, environment and health policy as a key part of the solution to delivering a sustainable food system.

Effective support for organic farmers involves a holistic and multi-pronged approach, addressing various aspects of farming, including education and resources, market access and policy advocacy. This strategy aims to create an enabling environment where organic farmers can thrive and contribute to sustainable agriculture.

BIM will continue to provide technical support to aquaculture enterprises in conversion to organic certification through pre-audits and assistance in setting up the required management systems and record keeping. This will be supplemented by supporting the development and dissemination of organic-compliant farming practices including welfare training, disease management and animal husbandry.

There are several actions identified to deliver on this strategic priority, including:

#### PRIORITY ACTIONS

##### 1. Securing Financial Assistance

- The Organic Farming Scheme plays a critical role in supporting organic farming and ensuring viability of production systems. The aim of this strategy is that the scheme opens annually over the period to 2030.
- Deliver ongoing funding for the Organic Processor Investment grant to support the development of value added facilities. In addition, the opportunities offered

by financial supports available through organisations such as Enterprise Ireland and Sustainable Finance Ireland will have a key role to play in growing the capacity of the sector.

- Helping farmers put the facilities and equipment in place represents a critical part of the support infrastructure to grow the sector. Continued funding through the TAMS 3 Organic Capital Investment Scheme, is an important priority for this strategy.
- Continued support for the aquaculture sector through the European Maritime Fisheries & Aquaculture Fund (EMFAF).
- The LEADER Programme has been operating in Ireland and across all EU member states since 1991. LEADER follows a community led local development approach that involves the participation of local people in developing responses to key economic, environmental and social challenges that exist in their areas. €180mn in funding is available for the period 2023-2027 and is a key funding opportunity for diversification on organic farms.



##### 2. Ongoing Provision of Technical Support

- Knowledge exchange through a strong advisory infrastructure via Teagasc and ACA members is critical to successfully growing farmer participation in organic farming. This strategy commits to continuing to support the advisory sector to deliver personalised, on-farm technical support and guidance to organic farmers.
- In addition, the aim is that 100% of Farm Advisory System advisors will have completed basic training in Organics by 2025.
- Knowledge Transfer groups represent one of the most impactful ways of supporting farmers already farming organically or those in conversion. DAFM will review the success of existing discussion groups, take on board the learnings and aim to replicate the approach.

- Central to encouraging new entrants into the organic sector is certainty around the business case. Teagasc will undertake and disseminate economic analysis on organic farming systems annually from 2024 to demonstrate how organic farming systems compare with other potential enterprises.
- Farmer-to-farmer mentoring programmes have a key role to play. Experienced organic farmers can provide valuable mentoring and support to farmers that are new to organic practices. DAFM is committed to facilitating and supporting growth in this area.
- DAFM will work with organic certification bodies and other relevant stakeholders to help secure easier access for organic farmers to essential resources such as organic seeds, fertilisers, pest management products and equipment.

### 3. Supporting Access to Land and Resources

- This strategy commits to exploring policies that protect and facilitate access to land and maritime area suitable for organic farming, including land-use regulations and conservation easements.
- DAFM will work across government to support the expansion of sustainable land management practices, such as agroforestry and rotational grazing as highlighted in the Climate Action Plan.
- A critical challenge facing the livestock sector is access to and the cost of organic feed. This has the potential to limit the ability to finish cattle and sheep and impact dairy production. Addressing this represents a key priority, particularly in relation to organic milling.
- In addition, Teagasc and the ACA will support farmers to improve their feed autonomy through a targeted plan in relation to grazing management, multispecies swards, clover and homegrown cereals to help minimise the need to purchase organic feeds.
- Food Vision calls out the exploration of an Organic Land Rental Hub for those wishing to expand/join Organics. This will be pursued further as part of the strategy implementation.

### 4. Enhanced market transparency

- There is a need to increase the level of price reporting to inform farmers of prevailing prices and provide confidence that a market exists for their products. DAFM will prioritise publishing prices on a regular basis through agricultural media and Bord Bia with pricing information incorporated into the Organic

Trading Hub over the medium term.

- Expanding the range of markets available to organic farmers and food producers with a focus on local markets, retailers, and direct-to-consumer will be pursued. This will require greater emphasis on these channels by Local Enterprise Offices, Bord Bia and other support organisations.



### 5. Attracting younger farmers & growers

- Attracting young farmers and growers to organic is key as the agriculture sector seeks to diversify. This requires a number of actions to be delivered:
  - o Enhanced sharing of information and support to help younger farmers make informed decisions regarding organic farming. A mentorship programme will be considered to help provide more focused training and technical support.
  - o A targeted engagement programme in conjunction with Macra na Feirme and Bord Iascaigh Mhara for organic aquaculture will be explored.
  - o Undertake an assessment of the flexibility required in the farming model to help improve access to land for younger farmers. This will include consideration of community, cooperative and partnership models.
  - o Preferential access to finance for younger farmers in terms of grants and low interest loans will be explored further.

- Growing participation in organic farming and food production also requires a strong focus on encouraging diversity across the sector. This will require the implementation of inclusive policies that attract women to the sector and support diversity.

## 6. Organic Certification Guidance & Assistance

- The guidance, training, and support provided by Organic Certification Bodies is critical to help farmers and growers navigate certification requirements. Additional access to this support is important in growing participation.
- The development and maintenance of an FAQ section for certification guidance and issues on the Organic Hub will be pursued.
- Equally it is important that certification requirements are met as efficiently as possible. Consideration should be given to how collaborations can be created to help streamline auditing and inspection requirements to remove duplication and make it more efficient for farmers and growers.



### 7.1 Co-ordinating the Value Chain

Improving the co-ordination of the value chain is critical to optimising the value of the organic sector and ensuring that it offers a viable livelihood for farmers and food producers.

This requires enhanced collaboration between farmers, processors, retailers, and other stakeholders. It also needs to involve greater communication across the value chain. Priorities for this strategy include:

#### PRIORITY ACTIONS

##### 1. Strengthening linkages between farmers & growers

As the sector grows it will be more important than ever that farmers can connect with each other to trade, share best

practice and success stories. This requires the sector to build on the Organic Trading Hub through the creation of farmer networks and cooperatives that facilitate resource sharing and collective marketing efforts.



Leakage from the organic sector remains a key challenge for the livestock sector approximately 70% of lambs and up to 30% of cattle being lost to the sector at the store stage. This is negatively affecting the value of the sector and reducing organic volumes available for sale in Ireland and export markets. Actions to address this include:

- Further development of the Organic Trading Hub to improve the co-ordination of the supply base.
- There will be renewed focus on encouraging the formation of additional organic producer organisations across all sectors of farming including fisheries to better co-ordinate supplies of inputs and outputs. This is particularly important for linking store producers and finishers. Recognising the importance of strong co-ordinators, further support for producer organisations will be a key focus of DAFM.
- Ensure 'ease of movement' of livestock either via inter farm trading, marts or directly to processors.
- For sectors such as dairy there will be an emphasis on exploring mechanisms that can encourage clusters of farms on a regional basis to address the logistics challenge and co-ordinate organic milk supplies.

##### 2. Expanded processor network

Easier access to processing facilities has been consistently identified as a key need to help the organic sector to grow and provide greater market certainty to farmers.

Critical to encouraging greater interest among processors is enhanced certainty regarding the supply pipeline. Key actions for the period ahead include:

- DAFM in conjunction with the organic certification bodies to implement more in-depth data collection to provide regular updates to stakeholders on the supply pipeline.
- Targeted capital investment supports to enhance processing infrastructure. For some sectors, the development of shared facilities will be considered to help boost access to processing infrastructure and optimise utilisation.

### 3. Supporting short supply chains

Short supply chains have the potential to boost the value of organic food output. The principal actions to be delivered as part of this strategy include:

- Food Vision 2030 highlights the need to promote short, efficient routes to the market, support opportunities for direct sales and support small and artisan producers. This will be reflected in the work programme of LEO's and other support agencies to ensure appropriate skills training and mentoring is available to organic producers.
- The creation of an Organic Knowledge Academy to support the development of the sector on a local, regional basis involving a group of organic experts in delivering knowledge exchange programmes in the organic processing sector.
- DAFM will engage strongly with the work programmes of organisations such as National Organic Training Skillnet, Teagasc, Enterprise Ireland and Bord Bia to explore the potential for an Organic Academy to play a useful role in fostering innovation in organic processing.
- Supports for the further development of smaller abattoir/processors will be considered by DAFM as one of the ways to facilitate the building of relationships between organic enterprises and local restaurants and stores.



### 4. Boosting distribution capability

Distribution can present a real challenge, particularly for smaller producers. The following actions will be delivered as part of this strategy:

- Local Enterprise Offices to explore the potential for distribution models to work on a more local/regional basis for smaller suppliers to ease logistic challenges, minimise time from farm to market and reduce spoilage.



## 7.2 Growing the Irish Market

As supplies increase, it is critical that the sector invests in developing a strong market for Irish organic food in Ireland, notwithstanding the anticipated growing importance of exports in the period to 2030.

Delivering on this will focus on a number of actions areas, including:

### PRIORITY ACTIONS

#### 1. Understanding Irish consumer needs

Developing the Irish market needs to be built from a position of a strong understanding of consumer and market needs. Bord Bia is committed to the regular sharing of consumer insights to help stakeholders better understand how consumer behaviour, understanding and expectations in relation to organic are evolving.

#### 2. Utilising and strengthening the market proposition for Irish organic food

The work completed by Bord Bia to develop a consumer-focused proposition in Ireland articulates the unique consumer benefits offered by organic food and has been instrumental in shaping Bord Bia's national marketing campaign.

Bord Bia is committed to further evolving the proposition and campaign messaging as further, credible facts are developed.

### 3. Engaging with Irish customers

Proactive support for organic food by multiple retailers and independent stores to assist supply chain development and visibility of organic products in-store is important to successfully grow the organic market in Ireland. Central to this is positioning organic as an important part of their premiumisation strategies and product ranges.

In addition, foodservice companies, the hospitality sector and public procurement represent important channels to grow the value of the sector.

The priorities for the period ahead include:

- Retailers have a key role to play in supporting local producers through mentoring, launch support and promoting seasonal lines. Bord Bia and suppliers will continue to engage with retailers to identify potential for further collaboration.
- Positive examples of enhanced merchandising of organic in-store have emerged over recent years. Extending this approach to a greater number of stores is key to building greater consumer awareness of the range of organic products available.
- Developing the Irish market requires a strong partnership between retailers, their suppliers and Bord Bia to promote organic food to shoppers through the ongoing delivery of education and promotional programmes.



### 4. Educating Irish consumers

A key element of promoting Irish organic produce to Irish consumers involves creating an emotional connection with organic farming through a positive differentiation approach that clearly articulates the benefits of organic food.

Recent years have seen a steady increase in the proportion of Irish consumers buying at least some organic products. Research undertaken by Bord Bia in 2023 shows that nearly 1 in 2 consumers are purchasing at least some organic products on a weekly basis.



The same research highlighted ongoing positive developments despite the level of price inflation being faced by consumers. When asked about their future purchase intentions some 45% said they intended to buy more organic in the future with 50% intending to maintain their organic consumption in the next 12 months.

This provides a solid platform from which to build a larger market for Irish organic food. However, significant education is required to build stronger consumer understanding of the benefits offered by organic food.

Central to this is helping Irish consumers understand what organic means, the benefits it offers and how to find organic products in-store.

There are several actions to be delivered in terms of educating Irish consumers over the lifetime of this strategy. These include:

- A benefits focused marketing campaign delivered by Bord Bia in partnership with retailers and their suppliers. A short-term focus should be to grow the in-store presence of campaign messaging.
- Regular tracking of campaign impact among the target audience in terms of understanding of the benefits of organic food and impact on purchases.
- Further expand the presence of organic food at major consumer events such as Bloom.
- DAFM to partner with schools and educational institutions to introduce modules on organic food production into the curriculum. This could build on initiatives such as the children's booklet on Organic

Farming for primary schools released by An Taisce in Autumn 2023.

- A target to increase organic produce in School Milk and Fruit and Vegetable Schemes will be explored by DAFM.
- A continued rollout of Bord Iascaigh Mhara's 'Aquaculture Remote Classroom' (ARC) aimed at National Schools all over the country which educates pupils on how aquaculture produce is farmed, including organically farmed produce.
- LEO's, local authorities and organic certification bodies to explore the potential for community events, such as farmers' markets, fairs, and festivals, to interact with consumers directly on benefits of organic food.



### 5. Growing preference for Irish organic food

The medium-term focus needs to be on establishing a strong preference for Irish organic food among consumers. Achieving this requires the delivery of a number of actions, including:

- Ongoing investment in verifiable facts and claims that can be made about Irish organic food. This will include a focus on emissions, soil health, water quality, carbon storage and biodiversity while also emphasising the benefits of local sourcing in terms of support for local farmers and communities.
- Investment in targeted research to explore any potential health benefits associated with organic food that can be communicated to consumers.
- Highlight the role of shorter supply chains and routes to market in minimising environmental impact and delivering economic benefits to the local economy.
- Help producers tell the story behind their products, including the farming practices, local sourcing, and the people behind the product. The development and maintenance of an 'Organic Fact Sheet' by DAFM could provide a valuable resource to help companies position the benefits delivered by their organic products.

Notwithstanding the strength of the term 'organic' to attract consumers, a strong call to action built around a common logo/label that creates a clear link between promotional messaging and products in-store could help grow sales further over the lifetime of this strategy.



The role of an Irish organic logo/label for all organic food, including seafood that could supplement organic standards and assure consumers of the quality and authenticity of the full range of Irish organic products merits consideration.

A decision on the strategic approach to be pursued will be informed by a detailed assessment of different available options. The immediate action as part of the implementation of this strategy is as follows:

- Undertake an in-depth assessment to explore the potential for an organic logo/label to grow preference for Irish organic food. This will consider all potential options, including the benefit of placing greater emphasis on existing certification logos, increased marketing of the EU green leaf and the development of a new logo/label.

The assessment of each option will focus on a range of criteria, including:

- Ability to convey the strength of organic certification in Ireland, which plays a key role in reassuring consumers.
- Ease of maintaining robust management and usage criteria.
- Potential to drive purchases of Irish organic food.
- Likely uptake by organic food processors.
- Likely acceptance of retailers to display prominently on pack/in-store.
- Potential usage through other sales channels.

By understanding the target audience and adapting the messaging accordingly, this strategy can help successfully build a loyal customer base and establish a more prominent presence for Irish organic food on the domestic market.

Monitoring the success of the consumer-focused activities through tracking a clear set of KPIs such as sales growth, consumer understanding and propensity to purchase will remain a key focus of Bord Bia promotional activities.



### 7.3 Driving Export Growth

As supplies increase, it is critical that the sector invests in developing strong export markets for Irish organic food.

Medium term projections for the European market point to further growth, which will present opportunities for Irish exporters, provided we can credibly position Ireland as a source of premium organic food products across meat, dairy, seafood and prepared foods.

Successfully growing the market for Irish organic food is dependent on a number of key actions, including:

#### **PRIORITY ACTIONS**

##### **1. Understanding market trends**

Developing the market position for Irish organic food needs to be built from a position of a strong understanding of consumer and market needs. Bord Bia is committed to the regular sharing of market and consumer insights to help stakeholders better understand evolving European market demand.

Insights will focus on Ireland and priority export markets. The research currently being completed by Bord Bia will be key to identifying priority markets for each category. This will be supplemented by market study visits.

Existing organic companies recognise the need for farmer and grower groups to visit export markets to better understand their needs. Companies will work with relevant groups to organise study trips and ensure strong dissemination of insights gained.

##### **2. Growing awareness of Irish organic food in export markets**

Successfully growing awareness of Irish organic food across priority markets will be critical in maintaining prices and driving the value of the organic sector.

A focused market development approach is required to successfully grow sales of Irish organic food across Europe and beyond.

This will involve a number of different phases, including:

- *Invest in identifying export market opportunities.*
  - The research currently being undertaken by Bord Bia represents a critical step in the identification of potential markets and customers by category.
  - This will be supplemented by the regular capture and dissemination of market and consumer insights for priority markets with a focus on identifying potential new opportunities.
- *Lead generation programme in selected markets*  
Growing the portfolio of customers will be critical to growing export value. It requires an engagement programme with targeted customers to bring them to Ireland to 'walk' the organic supply chain and understand the key points of differentiation offered by Irish organic food that will resonate with their consumers.  
The range of buyer engagement actions to be delivered by Bord Bia and exporters include:
  - Bord Bia programme of buyer engagement in export markets delivered through trade fairs, inward buyer visits, buyer meetings and trade promotion activities.
  - LEO's to support organic producers to establish an e-commerce platform for online sales, making it convenient for customers to purchase organic products.

### 3. Marketing proposition for export markets

Irish organic food needs to have a credible, fact-based marketing proposition to justify premium positioning and differentiate Ireland as a source of organic food products in priority markets.

- Bord Bia will work to build a credible, trade focused proposition for key products across priority export markets that can positively differentiate Irish organic food products. This proposition, which will utilise the strengths of Irish organic standards will seek to recognise the needs of different markets and categories.

### 4. Market entry supports

Exporters will be supported in the delivery of their market entry strategy and distributor identification to help build their capability to export.

This will require a planned approach, ensuring that companies are in a position to export as product availability grows.

### 5. Promotional programme with key customers

Bord Bia will work with exporters to explore promotional opportunities with key customers.

To boost marketing investment on a sustained basis to grow awareness of Irish organic food, access to EU promotional funding can play a key role. Significant progress was made in 2023 with Bord Bia's successful application for a €2.7m three-year campaign for beef and lamb in four European markets.



### 6. Labelling in export markets

Similar to the domestic market, consideration needs to be given to the labelling approach for Irish organic food in export markets. An assessment of different options, including the EU leaf, in terms of potential effectiveness, current awareness, acceptability at customer level, impact on premium positioning and investment will be undertaken.

Ongoing assessment of export performance, awareness and preference among trade buyers will form an ongoing focus of KPI tracking by the Organic Strategy Forum.

### 7.4 Expanding Public Procurement

Public Procurement has the potential to be an increasingly important sales channel for organic food on the Irish market. This potential will be boosted by the inclusion of a minimum percentage by value of food sought by public sector bodies, under new procurement arrangements, to be certified organic in the revised Green Public Procurement (GPP) criteria.



Delivering on this require several actions to be implemented, including:

- Establish procurement targets for organic products, specifying the percentage of organic produce that public sector organisations should aim to source.
- In order to deliver on the stated ambition, since the publication of the GPP Strategy and Action Plan, a minimum of 10% of food purchased via public procurement must be certified organic in accordance with Regulation (EU) 2018/848. The level of seasonal products should also be included as a key criteria in public sector procurement of food. From the date of publication of the GPP Strategy and Action Plan a minimum of 10% by value (€) of food sought by public sector bodies under new contract arrangements (including via contractors such as canteen service providers), is to be certified organic in each of the following categories of Cereals, fresh Beef, Lamb, Pork, Poultry, Fish, Vegetables and Dairy products, where possible.
- Development of clear and comprehensive GPP guidelines and criteria for the procurement of organic

food products. These guidelines should outline the specific requirements for organic certification, production practices, and sustainability standards and detail the appropriate verification, which is acceptable, including both Irish & EU wide equivalents.

- Bord Bia to maintain a 'live' list of organic suppliers accessible by foodservice operators and distributors.
- Conduct awareness campaigns and capacity-building programmes for government procurement officers and relevant stakeholders, ensuring they understand basic principles of Organics, the benefits of organic farming/products, how to implement GPP for organic products effectively and how to verify product claims submitted (certification & labelling)
- Integrate organic farming and organic products into public procurement policies and strategies at the national, regional, or local levels.
- Foster partnerships and collaborations between government agencies and organic farming organisations, cooperatives, and associations. Engage with organic farmers to ensure a reliable supply of organic products.
- Establish a monitoring and reporting system to track the progress of GPP initiatives related to organic farming. Regularly assess the impact of these initiatives on organic production and market growth.



### 7.5 Boosting Skills & Supports

The future growth of the organic food sector in Ireland requires structured supports to build a strong infrastructure, enhance skills at farm level and build industry capacity.

The increased payment rates available through the Organic Farming Scheme provide further incentives for farmers considering conversion to organic and will help to expand the area farmed organically.

Given the medium-term demand prospects for organic food in Ireland and overseas markets, it is important that the best support structure possible is in place to encourage and reward output from land farmed organically.

This will involve securing policy support to foster skills development in the organic sector. The key actions to be delivered in the period ahead include:

#### PRIORITY ACTIONS

##### 1. Knowledge transfer for farmers

The enhanced roll out of knowledge transfer for organic farmers will form a critical support for farmers in the process of conversion to organic farming and more experienced farmers seeking to further enhance the performance of their enterprise.

This work will be in addition to ongoing increases on the advisory network to support farmers.

The Department of Agriculture, Food and the Marine in Ireland has implemented several initiatives focusing on knowledge transfer for organic farming, as part of their broader strategies to support and develop the agricultural sector.

- **Knowledge Transfer Programme 2024-2026:**

This three-year programme is designed to foster knowledge exchange and innovation among advisors, farmers, and other stakeholders. It aims to help farmers address current and future challenges in agriculture, including those specific to organic farming. The program involves a network of approved Knowledge Transfer Facilitators who work directly with farmers. Industry have successfully provided funding to support knowledge exchange in other sectors and the potential for new partnerships between industry and organic sectors will be explored.

- The opportunities to further leverage the Organic Growers of Ireland network and farm walks will be developed.

- **Organic Farming Information:** DAFM provides comprehensive information on organic farming, including the process of converting to organic production methods. This process is governed by specific European regulations with DAFM overseeing the regulation of the organic sector in Ireland. The Department also supports initiatives such as the Organic Strategy Forum, Organic Demonstration Farm Walks, and provides various resources, such as an Organic Farming Factsheet and an Organic Seed Database.

These ongoing initiatives reflect DAFM's commitment to promoting sustainable agriculture practices, including organic farming, through knowledge transfer and resource provision. The emphasis on collaboration, innovation, and adherence to regulations ensures that the knowledge transfer is impactful and aligns with current agricultural standards and practices. The success of the Limerick Tipperary organic farmers discussion group will be examined and the potential to provide funding to establish similar groups will be investigated.



## 2. Education and training programmes

The continued development of specialised courses in organic farming at agricultural colleges and universities will be delivered. In 2023 Pallaskenry Agricultural college began conversion to organic farming and will be a valuable lighthouse for organic farming.

The Organic Farming Principles course provided by Teagasc and National Organic Training Skillnet to educate organic farmers about organic farming principles, practices, and certification requirements will remain central.

National Organic Training Skillnet (NOTS) provide high-quality, low-cost, part-funded training for the organic and agri-food sectors throughout the Republic of Ireland. In 2024, NOTS will be offering a wide range of specialist courses for farmers, food businesses, growers, processors, agricultural professionals, and consultants working in the organic sector. It is essential that this opportunity for training continues and is expanded.

The expanded delivery of QQI level 5 and 6 in Horticulture (organic) will be important to growing skills in the sector as they provide local 'hands on' training. The Organic Growers of Ireland Work Placement Programme, which is funded by DAFM allows interns to work with existing growers and also visit other growers providing the potential to grow skills among smaller growers.

In addition, this strategy is focused on ensuring that the majority of Further and Higher Education institutions with agri-food courses have, at a minimum, a module dedicated

to organic farming and business development by 2030 and the potential for establishing networks between colleges will be explored. Including organic food systems as part of the curriculum delivered by catering colleges has a key role to play in educating young chefs and graduates entering the hospitality sector.

This will be supplemented by ongoing training programmes for existing farmers and industry professionals to stay updated with the latest organic farming techniques and regulations. We will encourage apprenticeship programmes that allow students to gain hands-on experience in organic farming while also supporting the development of online platforms for remote learning and knowledge sharing.

Other training areas will include:

- Understanding and complying with organic regulatory frameworks.
- Training in the use of modern agricultural technologies that can benefit organic farming.

## 3. Research and development

As the sector expands there is an increasing need for research and development supports. The research focus as part of this strategy will be as follows:

- Allocating financial resources for organic-specific research projects and initiatives with a focus on 'inside the farm gate' projects aimed at improving and innovating organic farming practices. DAFM research calls will continue to include opportunities for organic research to meet the needs of the sector while Teagasc will continue to include organic research in its annual programme of activities.
- Collaborate with public and private sector partners to increase overall research funding for organic farming. Engagement plan with Universities and Research Centres to establish partnerships with academic institutions for research and development in organic farming.
- Participate in research networks and consortiums focused on organic agriculture to facilitate multi-disciplinary research.
- Establish a centralised database for organic research findings, including studies on organic farming practices, soil health, crop varieties, and pest management which will be accessible to all.
- The organic sector will contribute to the development of an Agricultural Knowledge and Innovation System (AKIS) in line with the CAP Strategic Plan. This will include enhancing knowledge flows and strengthening links between research and practice,

strengthening all farm advisory services and fostering their interconnection. The implementation of this strategy will focus on ensuring that knowledge exchange programmes bridge the gap between research findings and practical application on farms.

- Explore opportunities for organic food producers to access existing R & D and innovation infrastructure while supporting the development of regional innovation clusters. Offer resources, mentorship, and funding for promising organic innovations.
- Seek to maximise Irish drawdown of EU funding such as that available under Cluster 6 in Horizon Europe to undertake research/innovation in organics.
- There will be an emphasis on Living Labs to drive farmer led research. This approach provides a long-term and user-centred framework for facilitating the co-design, co-development and rapid uptake of innovations tailored to specific locations.
- Skillnet Ireland has committed €1.1 million per year for the next 2 years towards education and training for the organic sector through National Organic Training Skillnet. The potential for future increased funding through public private partnership with Science Foundation Ireland will be explored.

#### **4. Industry Collaboration and Networking**

There is a real opportunity to create a collaboration network across the sector to allow producers to learn from each other spanning organic farmers, food processors and other stakeholders.

A range of initiatives will be delivered ranging from conferences, workshops, peer to peer mentoring and knowledge exchange platforms.

There will be a focus on establishing international exchange programmes to learn from global best practices in organic farming while also encouraging participation in international organic farming conferences and workshops.

#### **5. Business capability**

There is a need to equip companies with skills to develop their business in Ireland and strengthen their export capability.

There are several areas where capability support is required, including:

- 'Commercialisation' skills, especially for growers
- Business mentoring
- Marketing skills
- Branding skills & supports
- Packaging innovation

Existing capability programmes through organisations such as Bord Bia, Enterprise Ireland and Local Enterprise Offices can provide the basis for many of these areas.



## Appendix 1.0

### Forum Membership

#### Organic Strategy Forum Membership

|                                                |                    |
|------------------------------------------------|--------------------|
| Chairperson                                    | Padraig Brennan    |
| Agricultural Consultants Association           | Mary Lynch         |
| Beechlawn Organic Farm                         | Padraig Fahy       |
| Bord Bia                                       | Emmet Doyle        |
| Bord Iascaigh Mhara                            | Catherine Morrison |
| Department of Agriculture, Food and the Marine | Eileen Hiney       |
| Department of Agriculture, Food and the Marine | Jack Nolan         |
| Flahavans                                      | Annie Flahavan     |
| Glenisk                                        | Emma Walls         |
| Good Herdsmen                                  | John Purcell       |
| ICMSA Farm and Rural Affairs Committee         | Brian Delaney      |
| ICSA Organics Committee                        | Fergal Byrne       |
| Irish Farmers Association                      | John Fitzpatrick   |
| Irish Organic Milk Suppliers Co-op Ltd         | Gavin Lynch        |
| IFA Aquaculture                                | Teresa Morrissey   |
| Irish Country Meats                            | Kathryn Roche      |
| Irish Natura and Hill Farmers Association      | Henry O'Donnell    |
| Irish Organic Association                      | Gillian Westbrook  |
| Macra na Feirme                                | Maria Snell        |
| National Organic Training Skillnet             | Sean McGloin       |
| Office of Government Procurement               | Dermot Callaghan   |
| Organic Growers of Ireland                     | Orla Burke         |
| Organic Trust                                  | Stephen Connolly   |
| Talamh Beo                                     | John Brennan       |
| Teagasc                                        | Elaine Leavy       |
| The Little Milk Company                        | Conor Mulhall      |

## Appendix 1.1

## List of Projects funded under the Organic Promotion Call 2024

|                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>ACA Tipperary</b>                              | This project will support and expand the ability of private agricultural advisors to provide relevant advice to organic farmers.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>National Organic Training Skillnet</b>         | The establishment of an Organic & Biological Living Lab Programme to bring together farmers and researchers to facilitate research and co-ordinate knowledge sharing. The core aspect of the programme is the establishment of Living Labs on organic farms identified within the NOTS network.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|                                                   | The creation of a substantive library of instructional videos covering all aspects of conversion to organic farming. Aligning with the Organic Farming Principles course, these videos will provide insights into the individual sectors of organic agriculture as well as broad topics with regard to helping farmers transition to organic practices.                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|                                                   | This project provides for the purchase of trial equipment to be used in practical organic training programmes for small-scale dairy production. Essential training equipment is currently unavailable in Ireland for key areas such as cheesemaking, yoghurt production, butter production, and ice cream production. This project aims to rectify this situation by creating a dedicated small-scale dairy processing training unit.                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Irish Organic Association</b>                  | The campaign will showcase all relevant sectors including, beef, sheep, dairy, cereals and pulses, horticulture, poultry/eggs and aquaculture. The campaign will be driven by experiential and immersive films and other high-quality visual content that is evidence-based. It will seek to capture what Irish organic operators can deliver, from high-quality produce, increasing environmental protection to enhancing animal welfare, whilst complying with EU marketing standards and relevant EU legislation. A social media campaign and engagement strategy will be created and implemented for Meta platforms (e.g., Facebook, Instagram), TikTok and Youtube, with insights and analytic reporting conducted to measure the awareness of the 'This is Irish Organic [...]' campaign amongst Irish consumers. |
| <b>Irish Organic Milk Producers Ltd Waterford</b> | A pilot project will investigate the use of Organic Milk to make both Organic Butter and Organic Skimmed Milk Powder. There will be many new Organic Milk producers in the next 2/3 years entering the industry and a solution is needed to utilise their milk into saleable products for the domestic and export markets.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Organic Growers of Ireland</b>                 | The OGI's mission is to represent, support, grow and educate the growers that contribute to the Irish organic horticultural sector. This is achieved through the delivery of the Organic growers internship and Future growers conference each year alongside the development of the member network that offers farm walks, focus sessions and networking opportunities to organic growers throughout Ireland. This project will continue and expand the work of the OGI.                                                                                                                                                                                                                                                                                                                                               |
| <b>Dr. Jack Fahey</b>                             | This study aims to investigate the potential benefits of employing living mulches in organic tillage practices. By comparing the growth, weed suppression, soil health, and crop yield of living mulch systems to traditional methods, we seek to determine the viability and sustainability of integrating living mulches into organic farming systems in Ireland.                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

|                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Irish Organic Milk Suppliers Co-Op Society Ltd</b>     | This project will develop a business plan examining the possibilities for a newly formed, farmer owned organic dairy co-op in Ireland. This work will include an examination of processing opportunities and feasibility assessment of same, a look at strategic partnership options for the co-op and also an assessment of how the co-op could use its leverage to improve farmer incomes and make conversion to organic dairy a more attractive prospect.                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Limerick Community Grocery CLG aka The Urban Co-Op</b> | Market research on school-based procurement options with creation of relatable visual promotional materials and a range of ready to eat organic meals to test the market.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Irish Agroforestry Forum</b>                           | The “Cultivating Agricultural Resilience through Organic Farming with Trees” project is a comprehensive initiative promoting organic farming practices and resilience in agriculture. It aims to raise awareness about sustainable practices, healthy food, and the environment and includes farmer-led trials, farm walk tours, and farmer meet-ups showcasing the benefits of trees for organic farming. An ‘Organic Farming with Trees’ educational programme for farmers and schools with instructional materials and videos. The project also offers a “Farm Fresh to School Organic Vegetables” schools pilot programme, highlighting organic produce.                                                                                                                                                                                                                                             |
| <b>Organic Trust</b>                                      | To organize, promote and run a National Organic Food Fair. The Organic Food fair will include: Collaborating with organic food traders, producers and retailers to showcase the array of Organic produce on offer in this country amid a festival atmosphere and a great day out for the family. Selected producers and industry leaders will give practical seminars, with tastings; discussion on what their products route to market was like; Discussing why organic food is important to the Irish consumer; How to eat organically and within budget, and on how to grow your own organics. Celebrity chef demonstrations. 4 to 5 Irish celebrity chefs providing cooking demonstrations throughout the day as well as an “Organic cook off” in the main tent where the 4 chefs will be pitted against each other to create the best organic dish using only locally produced organic ingredients. |





