



NUFFIELD

ANNUAL CONFERENCE 2016

FOODWISE 2025

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FOODWISE 2025

- Key actions required to ensure that Ag-food sector maximises contribution to:
 - Economic Growth
 - Exports
- Build on Food Harvest 2020
- Growth in an environmentally sustainable manner
- Focus on measures to create jobs
- 36 members
- 9 sub-sectors



KEY HEADLINES

- Value of Agri-food exports up 85% to €19 Bn
- Drive value add increase by 70% to €13 Bn
- Primary output value rise to €10 Bn
- 23,000 jobs along the supply chain
- +350 actions



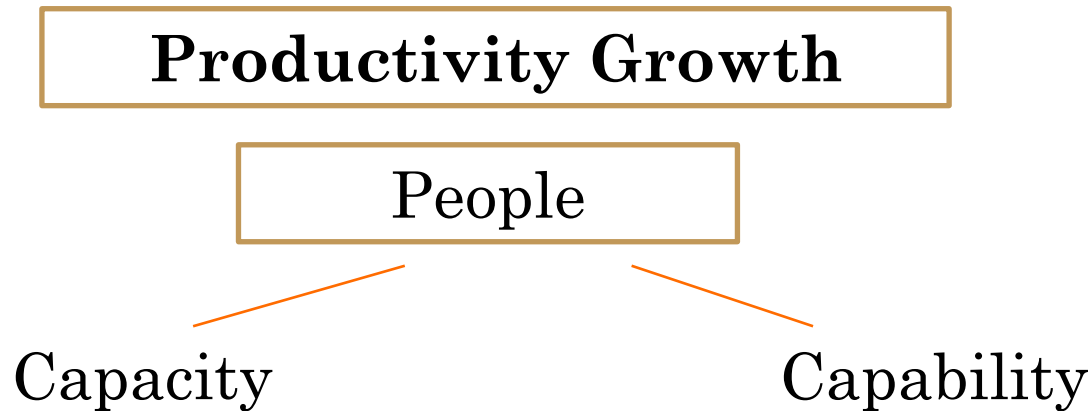
CURRENT CONTEXT

- Food and Beverage $M_{FTR.}$ - €26 Bn T/O
- 12.7% of merchandise exports
- 7.2% GVA at factor cost
- 8.4% total employment
- 140,000 farm families
- 70% of output value is Beef/Dairy
- 163,000 employed



KEY DRIVERS

1. Global Economic Growth
2. Human Capital
3. Competitiveness
4. Market Development
5. Innovation
6. Sustainability



GLOBAL ECONOMIC GROWTH

- World pop. increase by 2.3 Bn to 2050
- Rise of the consuming classes
- India/China middle classes of 50%/20% of population by 2050?
- International Trade Agreements
- Currency/Energy
- Climate Change
- UK/EU Relationship
- Geo-Political Issues
- Urbanisation



○ Innovation Capital to Drive Productivity Growth

- Physical Capital
 - I.C.T.
 - Knowledge Capital
 - R.D., Marketing, Brands, I.P.
 - Human Capital
 - Individual/Organisational Skills
 - Training, Organisation Efficiencies
 - New Business Processes
-
- 53% Labour Productivity Growth from Innovation Capital
 - 40% better marginal return from investment in Human -v- Knowledge Capital

Source: McKinsey, Co.



A SUSTAINABLE CYCLE?



CAPABLE PEOPLE

- Financial and Business Development Skills to Drive Growth
- Effective Knowledge Transfer
- Skilled Labour Availability/Competency Matrices
- Dairy Expansion Service
- Technology Capacity/Capability
- Marketing Capability
- Leadership for Scale Up
- Future Skills Needs



COMPETITIVENESS

- Commodity Price Risk Management Tools
- Land Mobility, Collaborative Models, Tax Structures
- Genomics/Animal Health
- Soil to Sward. Grassland Productivity. (2T/Ha Increase)
- Improve Funding Access to Support Scale
- “Lean” Development in Processing
- Waste, Energy, Regulatory Costs



INSIGHTS/MARKETS

- Re-orient State Resources to New Markets
- “One-Ireland” Approach Across Agencies
- “Origin Green” as a Watermark Brand
- Animal Health Status as Key Underpin
- Food/Tourism Linkages



INNOVATION

- Centre for Consumer Insights
- Review Current Agri-food Sector Innovation Capacity
- More Effective Co-ordination Across Technology Centres
- Build Underlying Technology/Capabilities
- Support Collaborative and Public/Private Sector Approaches
- Food Innovation Hub at Moorepark
- Drive Connectivity Across Irish Innovation Systems



SUSTAINABILITY

- Social, Economic, Environmental
- Sustainable Intensification
- Productivity Growth/Science Led
- S.E.A./Appropriate Assessment
- Climate Smart Agriculture
- Land Uses as a Mitigation Tool
- Knowledge Transfer/Sustainable Practices
- Measure, Quantify, Adapt.



CONCLUSION

- Consumer Change, Economic Growth Support future opportunity
- Focus on Capability Development along Supply Chain
- Volatility Management
- Connect and Collaborate
- Trust Chains
- Productivity Growth to Support Sustainable Competitiveness
- Balanced Approach
- Risk Management.

