

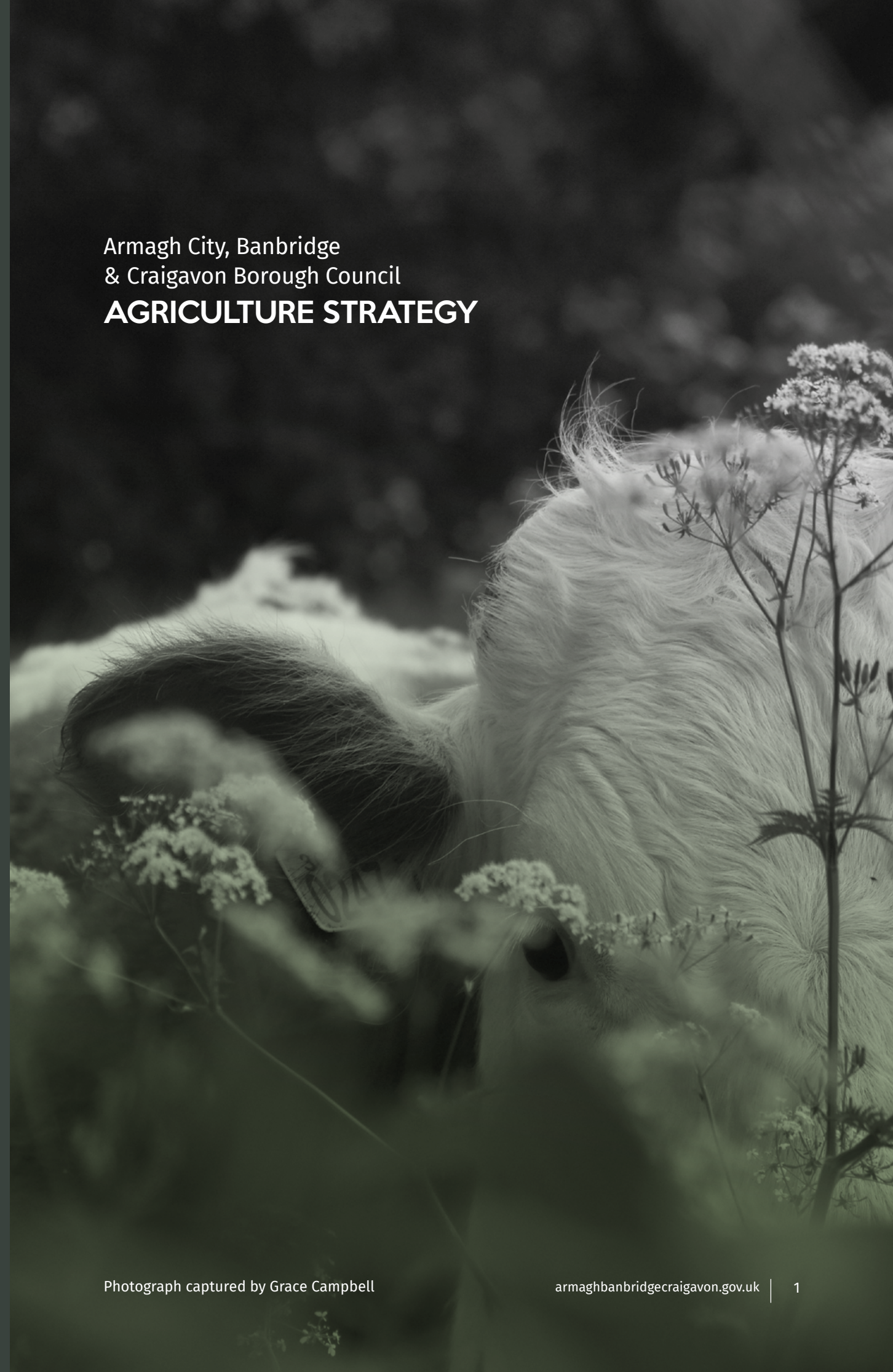
ARMAGH CITY,  
BANBRIDGE &  
CRAIGAVON  
BOROUGH COUNCIL



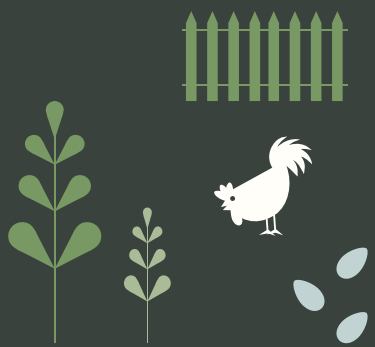
Armagh City  
Banbridge  
& Craigavon  
Borough Council

MARCH 2022  
LONG VERSION

Armagh City, Banbridge  
& Craigavon Borough Council  
**AGRICULTURE STRATEGY**



Photograph captured by Grace Campbell







# Contents

Foreword	5
Executive Summary	6
Armagh City, Banbridge & Craigavon Borough Council's Aspirations for Agriculture	9
Methodology	12
Engagement undertaken as part of this strategy	13
Key themes in agriculture	14
Section 1	
Context and background to agriculture in the Armagh City, Banbridge and Craigavon Borough Council area	19 - 61
1.1 The strategic context for agriculture in the Armagh City, Banbridge and Craigavon Borough Council	21
1.2 Why agriculture matters in the Armagh City, Banbridge and Craigavon Borough Council area	27
1.3 An overview of the agriculture industry within Armagh City, Banbridge and Craigavon Borough Council	29
1.4 An overview of agribusinesses in the borough	39
1.5 Council services that impact agriculture	43
1.6 Wider services that impact agriculture	49
1.7 SWOT analysis of agriculture in Armagh City, Banbridge and Craigavon Borough Council area	55
Section 2	
Addressing agriculture's challenges and opportunities in the Armagh City, Banbridge and Craigavon Borough Council area	63 - 91
2.1 Challenges, causes and solutions in agriculture	65
2.2 Recommendations	79
2.3 Implementation plan	87
About Birnie Consultancy	91
Appendices	93 - 99
Appendix One: Summary of consultations	94
Appendix Two: Equine businesses identified in the borough	95
Appendix Three: Agribusiness and stakeholder directory	96





# Foreword

Armagh City, Banbridge and Craigavon Borough (ABC) Council has the fourth highest representation of farms in the agriculture industry in Northern Ireland. As Lord Mayor of Armagh City, Banbridge and Craigavon, I am delighted to endorse the first council led Agriculture Strategy in Northern Ireland.

Armagh City, Banbridge and Craigavon Borough Council has recognised the importance of agriculture over the years through the Food Heartland and Tannaghmore Rare Breeds Animal Farm. It is evident from the rolling hills, fields, lough and orchards of the borough how agriculture is embedded deep in our generations and local communities.

The agriculture industry contributes an astonishing £376 million towards our local economy comprising of 3,431 registered farm businesses in the borough.

In the development of the strategy, we explored the borough’s agriculture industry from grass roots local farm enterprises to the businesses they support. With this knowledge, it was clear we had to design a strategy that supported the farmers, agri-food and agribusinesses of tomorrow.

With a focus on driving the future of farming, the strategy identifies key themes and challenges for the sector, sets out clear aspirations for council’s ongoing role, and its collaboration with stakeholders to support the industry.

The strategy is reflective of key messages from new policies such as Department for Agriculture and Rural Affairs (DAERA) Green Growth Strategy Framework and Future Agriculture Policy Proposals and Department for Economy ‘A 10x Economy’ Framework.

The recommendations from the strategy are just the beginning. They outline how we can work collaboratively to increase the productivity of the agriculture industry, improve the skills levels, instil innovation, embrace agri-tech and adapt technology into farming and food businesses, as well as grow the industry while putting in place avenues for our agriculture sector to adapt to the sustainable agenda.

I am confident that council, with the support of agriculture champions and stakeholders, will deliver the recommendations set out to support the agriculture industry in this time of change. I look forward to the evolution of the Food Heartland provision, the development of an Agriculture Centre and new opportunities for the sector in our borough.

I would like to acknowledge and thank all those have provided their input and contributed to this strategy.



*GB*

**Alderman Glenn Barr**  
Lord Mayor  
Armagh City Banbridge & Craigavon



# Executive Summary

Armagh City, Banbridge and Craigavon Borough (ABC) Council has the fourth largest agriculture sector in Northern Ireland (NI) accounting for 13% of NI, with 3,431 farms contributing approximately £376 million in goods value and farm support payments into the local economy, providing employment in the agriculture sector and to 265 local agribusinesses which the industry supports.

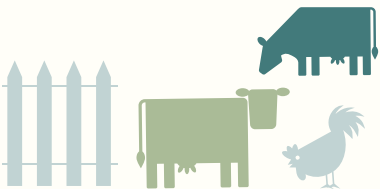
The council already operates some strong facilities and initiatives such as Food Heartland, a well-established programme which promotes the food sector in the region. Tannaghmore Rare Breeds Animal Farm is another asset, with knowledgeable staff who are already training the farmers of tomorrow through the hosting of work placement students from the Southern Regional College's (SRC) Agriculture Programme. These initiatives can enable the swift development and implementation of this strategy.

The agriculture industry will undergo massive changes over the next decade. With the anticipated introduction of a Climate Change Bill along with imminent changes in the farm payment system by the Northern Ireland Assembly (NI Assembly), farm businesses will have to benchmark their carbon, and actively work to reduce it, leading to opportunities for 'carbon farming' alongside traditional practices.

This will necessitate a large education programme with the need for changes in both farming practice and the uptake of new technologies. With one of the largest agriculture sectors in the province, ABC Council will have to move swiftly to safeguard the many constituents who rely on it as a main source of income and will need to become more active than ever before with the sector.

Communication will play a large role in the effective delivery of this strategy. Council will need to allocate sufficient resource to enable communications, marketing and education strategies to be successfully implemented within the time constraints of a quickly changing industry. 'Agricultural Champions' will be appointed who will lead the change across the agriculture industry, as well as keeping council up to date on important agriculture matters. The introduction of the first Agricultural Network in the area will be formed to hear from those farms and businesses who have been directly affected by the implementation of changes in the industry.

Designed to be in line with the findings of the Independent Strategic Review of the Northern Ireland Agri-Food Sector (ISRAF), the Green Growth Strategy and to work alongside the Mid South West (MSW) Regional Economic Strategy amongst others, it is the objective of this strategy to provide practical recommendations to enable the council to best support agriculture, agri-food and agri tech, helping to develop long term viability in the sector.



A range of themes were considered and explored which will drive and shape the future of the agriculture industry in the borough, these are;

1. The impact of changing farm support structures
2. The need for sustainable farming and business
3. The need for culture change in farming
4. Enablers and tools
5. Labour and automation
6. Development and diversification
7. Partnership with the council
8. Easy access to information/leveraging resource

Emerging from these themes and following engagement with council departments, key stakeholders, farmers and businesses, ten practical and achievable recommendations have been identified whereby council can intervene and collaborate to make a positive impact, namely;

1. Expand and evolve Food Heartland
2. Develop a method of communicating regularly and clearly with all agriculture and agribusinesses in the borough
3. Develop a plan to facilitate skills development in agriculture and agribusinesses
4. Appoint 'Agriculture Champions' for the borough
5. Develop an 'Agriculture Centre' for advice, training, demonstrations, and research
6. Facilitate structural upgrading
7. ABC rural strategy
8. Further studies in sectors related to the agriculture industry
9. Agri-food development
10. Promote the health and wellbeing of farmers and rural dwellers

Council will have to develop an action plan to enable the delivery of the recommendations. A broad implementation plan has been recommended in the form of immediate, short term and medium-term goals.





### Immediate (6 - 12 months)

- Appoint 'Agriculture Champions' as per recommendation four.
- Collaborate and begin to raise the awareness of stakeholder agri and rural support programmes which are available to the borough, to support the industry immediately.
- Collaborate and research potential support and skills based programmes for the borough as per recommendation three.
- Collaborate with stakeholders to promote health and wellbeing.
- Define Food Heartland new priorities and responsibilities, commence its expansion and evolution as per recommendation one, securing funds for its growth from council and/or external funds for programme delivery.
- Deliver the Food Heartland Action Plan.
- Develop a communication plan to engage with farmers and agribusinesses, develop online agriculture resource hub and signposting as per recommendation two.
- Establish an ABC Agriculture Network.
- Increase Food Heartland online and social media presence.
- Prioritise and scope the delivery of other strategies as per recommendations seven and eight.

### Short Term (1 - 2 Years)

- Conduct further research into the development of facilities and growth spaces for businesses as outlined in recommendations five and nine.
- Conduct workshops between council departments e.g. SOAR, Planning, DAERA and agri stakeholders to better understand farm diversification, planning barriers and new farming practices/requirements that lie ahead.
- Continue to develop an ABC rural strategy as outlined in recommendation seven.
- Continued expansion and evolution of Food Heartland as per recommendation one.
- Develop a programme of activities, seeking out experts in agriculture, technology and environmental practices as per recommendation three.
- Provide targeted and specific business and technological (not technical) training and support as per recommendation three.
- Research, collaborate and lobby for structural upgrading to support the industry as per recommendation six.

### Medium Term (3 - 5 Years)

Council should develop a physical space as outlined in recommendations five and nine for the provision of support, innovation, growth and development of the agriculture industry.



## Armagh City, Banbridge & Craigavon Borough Council's Aspirations for Agriculture

Armagh City, Banbridge and Craigavon Borough (ABC) Council is an industrial and food heartland, with pre-Covid Gross Value Add (GVA) of almost £4 billion, 10% of Northern Ireland (NI) total. It is a borough with a large rural population where agriculture is deeply embedded in its history and development from the orchards of County Armagh to the rolling drumlins of Rathfriland, at the foot of the Mourne Mountains. It encompasses an array of agricultural activities including primary agriculture, apple growing, eel fishing, horticulture and artisan production.

The agriculture industry is complex and is comprised of many sectors. Responsibility for agriculture sits with the Department of Agriculture, Environment and Rural Affairs (DAERA), whilst the Department for the Economy (DfE) has responsibility for economic development and tourism. The industry has a comprehensive range of stakeholder groups at local, regional and national level. In 2013, the Agri-Food Strategy Board at the direction of the two government departments mentioned above produced a 'Going for Growth' Strategy to support NI agri-food industry outlining plans for development to 2020. Not all components of this strategy were implemented, but it did set a direction for the industry. The 'Year of Food and Drink' took place in 2016 and highlighted all things food, from growers, producers to eateries and festivals. It was fully supported by the Government, Tourism NI and Tourism Ireland.

In 2018, DAERA produced a Northern Ireland Future Agricultural Policy Framework as a basis for discussion and means of creating a high level structure for the delivery of agricultural policy in NI following the UK's exit from the European Union (EU). In October 2021, DAERA released the Draft Green Growth Strategy focusing on sustainable approaches to balance climate, environment and the economy, and in January 2022 DAERA also commenced their consultation on Future Agricultural Policy Proposals for NI. These DAERA strategies have not been officially published yet but the general content can be deduced and should be closely followed as a development principle.

Most recently in January 2022, Sir Peter Kendall's Independent Strategic Review of the Northern Ireland Agri-Food Sector was published, outlining 11 priorities for the sector going forward, most importantly aspirations around the collection of data and sustainability which are also reflected in this strategy.

In the borough, agriculture contributes significantly to the economy through farmers, growers and agricultural based businesses. According to the council's Connected Community Plan 2017 - 2030 the agriculture sector accounts for 29% of business in the borough, leaving it the highest business sector and also higher than the NI agriculture sector average figure of 25%. In 2020, the borough had 3,431 active farms. The entire agricultural labour force in the borough in 2020 consisted of 7,495 workers, accounting for 14.6% of the NI agricultural labour force.

The agriculture industry faces many challenges, including changing policies associated with Brexit, changes in the economic environment due to the Covid pandemic, changes in planning policy and associated environmental issues, fluctuating market prices, weather events, diseases, and perhaps most significantly for the beef and sheep sectors are the proposed changes in the agricultural support policy. Despite the challenges, the industry continues to grow, producing food and contributing to the total agri-food supply chain. Effective supply chain promotion, skills development and management are key to delivering market focused products.

The agriculture sector underpins other business in the ABC borough. The growth of agri-food industry, agribusiness subsectors, manufacturing, machinery, veterinary practices and haulage/transportation of agri-commodities are dependent on growth in primary agriculture. Economic commentators note that agriculture and agri-food is a vital tool for distributing wealth from high population areas to rural areas. In other words, agriculture has a social role as well as an economic one. This is often overlooked.



As an example the transportation sector in the borough provides support to the agriculture and agri-food sector having in excess of 4,000 registered heavy goods vehicles (HGVs).

The leading educational provider for careers in agriculture is the College of Agriculture Food and Rural Enterprise (CAFRE), with campuses located at Greenmount, Enniskillen and Loughry. Whilst education is largely based on campus, CAFRE also has approximately 40 farm advisors who provide on-farm education and run farmer groups. At present, farm advisors and environmental advice are delivered by different advisors. This needs to change. Production and environmental advice need to be delivered together and this is something which ABC Council can help with, providing facilities and workshops where training and demonstration can take place, and encouraging farmers in the borough to upskill and develop themselves. The 2020 Statistical Review of NI Agriculture states that the adult population of more remote rural areas have on average a lower level of formal education attainment than those living in urban areas. The need is evident for ongoing personal development in rural areas and the agriculture industry particularly the changing skill sets required for successful farming today in terms of business, data, methods and technologies.

Commissioned by ABC Council, this Agriculture Strategy is the first of its kind anywhere in NI. As described in the coming pages, the sector is complex and varied, it requires increasingly specialised skills and support. Farm production supports a large agri-related industry which, amongst others, includes equipment suppliers, feed suppliers and veterinary practices generating wealth for rural economies.

The strategy will outline the current state of the agriculture sector and will benefit not only local farm enterprises, but the businesses which they support. The recommendations are designed to be achievable at a local level, whilst maximising impact.

1. Expand and evolve Food Heartland
2. Develop a method of communicating regularly and clearly with all agriculture and agribusinesses in the borough
3. Develop a plan to facilitate skills development in agriculture and agribusinesses
4. Appoint 'Agriculture Champions' for the borough
5. Develop an 'Agriculture Centre' for advice, training, demonstrations, and research
6. Facilitate structural upgrading
7. Implement an ABC rural strategy
8. Undertake further studies in sectors related to the agriculture industry
9. Enable agri-food development
10. Promote the health and wellbeing of farmers and rural dwellers

These recommendations will support the agriculture, agri food and agri tech industry and opportunities in ABC area, helping our farmers and businesses to improve and learn new processes to produce food in a productive, sustainable way while making the best use of the land and innovate with new technologies. It is important to recognise that this strategy focuses on the areas where the council can encourage the development of the agricultural sector. It is not specifically aimed at agricultural producers, although there is much that the sector can take from it.

It is essential that council does not duplicate the structures, support and resources provided by other stakeholders. Council should complement and promote stakeholders' resource offering in the borough to increase their uptake, whilst providing its own specific support in collaboration with stakeholders to bridge the needs of the agriculture industry in the borough. Much of what is recommended is around facilitation and creation of opportunities for joint working and leveraging of other organisations.





# Methodology

Birnie Consultancy liaised with the Community and Growth Directorate within the Council to design and conduct the research that underpins this strategy. The research was conducted in several stages throughout the development of the strategy.

**1. Initial profiling, desktop research and early engagement with Council Officers**

- a. Desktop research was conducted to create an initial profile of the Agri-food sector within the borough
  - i. A directory of agri-food businesses within the borough was created
  - ii. Farm census information was obtained and analysed
  - iii. Other information was collected on Council initiatives such as Food Heartland, MSW etc.
- b. Workshops were conducted with both Council Officers and Elected Representatives
  - i. A workshop was conducted using video conferencing and Mentimeter to gauge how Council staff view the agriculture sector, and investigate areas where impact from a strategy could be made.
  - ii. Two subsequent workshops were conducted with Elected Representatives to gauge their views on the agriculture sector, and discuss where they believe an agriculture strategy can help.
  - iii. Group interviews were held with people of interest from both inside and outside the Council to learn more about specific areas of interest which impacted the direction of this strategy.

**2. Identification and further exploration of key themes and pillars.**

- a. The key themes were identified by the consultation team and discussed with Council Officers
- b. Agreed themes were used to form the basis of the first draft proposals.
- c. Proposals were drafted and refined through additional research and information gathering.

**3. Survey development the Agriculture Sector and Agri-Food Business Sector**

- a. Having understood the main issues raised by stakeholders in the agriculture community two separate questionnaires were developed
  - i. Farmer Survey: Focused on understanding business types, education levels, business viability, key challenges.
  - ii. Agribusiness/Food Survey survey: Focused on understanding the view food businesses have of the agriculture industry and their concerns around potential reduction of supply.

**4. Further consultation with stakeholders regarding the detailed findings of the study**

**5. Write up of the final report**

# Engagement undertaken as part of this strategy

An important aspect of developing the Agriculture Strategy was the engagement with council, stakeholders, farmers and agribusinesses. Over the period of this commission, various forms of engagement were undertaken via video conferences, telephone calls and online surveys.

DATE	CONSULTATION GROUP
Ongoing	Engagement with DAERA, Agri-Food and Biosciences Institute (AFBI), Rural Support, Ulster Farmers’ Union (UFU), SRC, CAFRE, Invest NI, Agri-Food Quest at Queen’s University Belfast, and council departments (see below).
Ongoing	Conversations with agribusinesses and organisations including SlurryKat, Armagh Cider Company, NFU Mutual, Loughgall Beekeeping Association and AgriSearch.
January 2021	Internal council officers workshop
February 2021	Individual consultation sessions across departments and initiatives: <ul style="list-style-type: none"><li>• Community Planning, Community Development including Policy and Diversity Officer</li><li>• Environmental Health</li><li>• Food Heartland</li><li>• Mid South West Regional Growth Deal</li><li>• Planning</li><li>• Policing Community and Safety Partnership (PCSP)</li><li>• Southern Organisation for Action in Rural Areas (SOAR)</li><li>• Tannaghmore Rare Breeds Animal Farm, Biodiversity Team and Sustainable Farming Projects</li></ul>
February 2021	Elected Members presentation and workshop
February 2021	Presentation and discussion with Irish Central Border Area Network (ICBAN)
February 2021	Elected Members presentation and workshop
May 2021	Presentation at Economic Development and Regeneration Committee workshop
June to July 2021	Farmers Survey (Public)
July to August 2021	Agribusiness/Food Survey (Public)
September 2021	External stakeholder engagement and feedback session
September 2021	Agribusinesses engagement and feedback session
September 2021	Presentation to Economic Development and Regeneration Committee
September to October 2021	Draft Agricultural Strategy - Public Consultation and Policy Screening



# Key themes in agriculture

To ensure this strategy's viability in the long term, we firstly consider a range of key themes, comprising the main factors, which will influence and drive agriculture over the next 30 years. Preparing for these outcomes will enable ABC Council to give its producers the best opportunity to thrive while blazing a trail for other councils.

Not all themes can be resolved by the council, some are highly market related or will be dictated at a national or international level, but in most cases there are actions which can be taken to assist producers and businesses as they adjust and prepare.

## Theme 1: The impact of changing farm support structures

The move away from direct payments will have a major impact for the sector including; farmers, farm structures, farm numbers and the associated impact on rural communities. As indicated in the survey, 67% of respondents indicated that their farms are unviable without direct payments and the withdrawal of these will result in farms going out of business, predominantly but not completely within the beef and lamb sectors.

With the change of support structures to align with the principle 'public money for public goods', farmers will need to prepare for decarbonisation and environmental enhancement in farming. It is likely that eventually farmers will be able to trade 'carbon credits' which will open a new market, but it is imperative that our farmers are prepared with the right training and advice. The demonstration of good environmental practice is likely to become the minimum standard for entry into premium markets in Great Britain (GB) and elsewhere.

As part of the 'value chain', which describes all activities and services required to bring a product or service from conception to sale, the Council should encourage inclusive growth, ensuring that smallholder farmers are included as main actors along the value chain, and facilitate mutually-beneficial linkages with other stakeholders.

## Theme 2: The need for sustainable farming and business

Farmers understand the role they play as guardians of the countryside undertaking many essential activities such as increasing hedge heights, planting trees, planting cover crops, creating habitats and soil sampling, much of which goes unnoticed. Of those responding to the survey, 47% stated that sustainability is a challenge. 73% of farmers surveyed already undertake environmental activities but more needs to be done across the board. Carbon, climate and the environmental challenges were also mentioned several times in the Agribusiness/Food Survey.

As the NI Assembly consider the Climate Change Bill, it is clear that sustainability will be a key component of the agriculture industry in the future. Although a great challenge, this is also a great opportunity for the sector to innovate and find new and better ways of doing things to increase levels of economic, social and environmental sustainability in NI agriculture.

### Caring for the environment

There are a range of simple and more complex actions which can deliver improvements in the environment. Increasing hedge height, installing riparian strips to protect water courses and reducing imported phosphorous use on fields are just a few methods which can be used on farm to increase carbon storage while caring for the environment around us. Farmers and agri businesses will benefit from education and training in the use of sustainable methods and devices to better deliver on environmental goals, increase uptake and preparedness for more sustainable farming. Broadly, if the industry improves its carbon performance, it will improve most aspects of environmental performance.

### Dealing with waste/by-products/slurries

Developments that will help agri-food mitigate some of its environmental impacts and help with decarbonisation can be hard to keep up with. Repurposing slurry as a phosphorous source by using separators to extract nutrients while returning clean water or using it to produce hydrogen are just a few of the most recent innovations.

### Creating biodiversity

Silvopasture (the practice of integrating trees, forage and the grazing of domesticated animals in a mutually beneficial way) and wildflower strips around the edges of fields are just two ways in which farming can create biodiversity. These are ideas which can be trialled and demonstrated at the Tannaghmore Rare Breeds Animal Farm, which already demonstrates grazing cattle in meadows and should be given the opportunity to collaborate with agri stakeholders to provide knowledge and learning to farm businesses in the borough and share best practice.

## Theme 3: The need for culture change in farming

In many ways, agriculture can be both progressive in evolving practices and new ways of doing things, and limited in areas such as mental health and data collection.

Cultural change is required to

- Change farmer's perception of themselves from being solely 'production driven' to being 'production and environmentally' focused
- Increase and normalise the level of data collection and its use for management
- Increase collaboration between farmers
- Recognise the importance of maintaining good mental health
- Recognise the importance of personal development and skills training

According to the Health and Safety Executive (HSE), agricultural workers are 46% more likely than those in other industries to endure illness overall, meaning their risk of physical illness is higher than it is for other workers, which can also contribute to stress and anxiety. Mixed with the solitary nature of the sector, many workers can struggle with depression. A 2019 survey report by AgriLand and Empathy Research reported that 46% and 57% were impacted by anxiety and depression to some degree respectively.

According to the Farmers Survey, just over half of farmers benchmark or use data for things like amount of slurry spread, animal weight, growth rates and fertiliser use, with 61% of them seeing this data supplied by processors and others as part of an integrated supply chain. Further training on data collection, analysis and how it can be used effectively is required.

## Theme 4: Enablers and tools

Effective farming requires knowledge and tools, particularly in light of the significant environmental and economic challenges which will emerge over the next 10 years. According to Farmers Survey, 47% of farm business managers would like training in business planning and management, 42% in advice and skills training around best environmental practice, 39% on setting up a diversified business, 31.5% on managing planning permission and building, and 31.5% on technical skills training on agricultural practice.

Other tools, however, can be harder to come by such as reliable rural broadband and practical demonstration of the latest environmental practices which also enable or permit more productive agriculture. In the agrifood sector, incubation spaces can be hard to find but can stimulate rapid growth of fledgling food businesses.



### Theme 5: Labour and automation

Obtaining labour to assist on farms is becoming increasingly difficult. According to the Department of Agriculture, Environment and Rural Affairs (DAERA) there were 1404<sup>1</sup> seasonal and non-seasonal workers from outside the UK and Ireland employed in agriculture in NI, which accounts for around 11% of the agricultural labour force according to that year's agricultural census.

Shortages in key positions such as vets and lorry drivers also have a knock-on effect to distribution in the supply chain.

### Theme 6: Development and diversification

Development and diversification of farms will be key in the coming years, with farms needing to become more efficient, grow in size or diversify their operations in order to survive.

Historically, it is obvious that farm numbers drop over time. As individual farmers gain knowledge, as new technology and equipment are introduced, labour productivity rises, enabling one person to deliver work which would have required multiple people in previous decades. This means that one person can look after more land, and, as a consequence, farm numbers drop. This trend is likely to continue.

There is a very strong attachment to owning a small piece of land and many people remain in farming, some remain as a hobby farm and some remain because it is what their family has always done. It is unreasonable to expect that the smallest farms will be able to support even one full time person if the farm remains as it is.

The response to the need for small farms to support more than one person has usually been to establish another income. Many farmers in this situation obtain work off-farm, some outside the industry, others in roles linked to it. The only other solution is for the farm to diversify into another enterprise, one which is not dependent on holding a large amount of land. This has traditionally meant establishing a poultry unit (meat or eggs), finishing pigs for a large pig breeder or developing a food product. However, the increasing environmental pressure on land is going to mean that this will be severely curtailed unless solutions can be found for dealing with the large amounts of slurry which result from these enterprises.

It became clear during the research for the report that planning restrictions can restrict or prevent development on farms. Planning regulations are set at a national level and are implemented at a local level. It is clear that sometimes developments do not proceed because of a lack of engagement or understanding from a farmer. It is also clear that environmental considerations around planning regulations are going to increase.

One aspect of development which is becoming increasingly likely is around solutions to the large challenge which slurry and manure presents. Slurry causes one of the greatest environmental challenges around farming, with run-off to rivers and ammonia contamination of air being the most significant. Precision application techniques will help in this area, but in reality, the volume of slurry produced is the greatest problem. There is potential for slurry to replace the use of artificial fertilisers in many cases, but sometimes the associated transportation distances mean that this is not viable.

Planning department within council will need to be aware of the potential for slurry management units, their significant benefits and the likely risk areas. The plants could also be associated with a large amount of underground pipework to transport slurry and this will also be subject to planning oversight. There is real importance that council's Planning department fully understands slurry management in order to assess and provide guidance. This knowledge will in turn maximise the protection of the farm units and minimise the impact on local communities.

1 DAERA "Migrant Labour in Northern Ireland Agriculture" 2018

### Theme 7: Partnership with the Council

In the Farmers Survey, 72% of respondents said they do not have any interaction with the council. Traditionally council have not reached out to the farming community and work with mainstream agriculture has been limited as it was once regarded as a national responsibility under DAERA. This study demonstrates there is a gap between council and engagement with the agriculture sector.

In the Agribusiness/Food Survey, the opposite is true, with 73.5% stating they do engage with council and have a good relationship with council, mostly through Food Heartland and business support programmes.

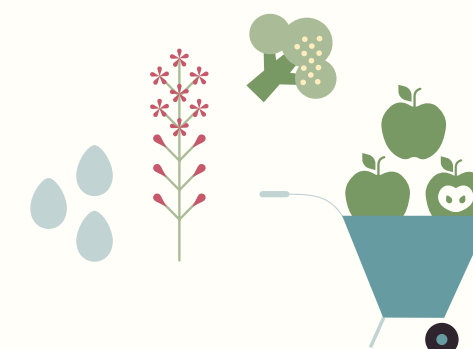
There is an opportunity for council to build relationships across the primary agriculture industry, particularly at farm business level and to raise recognition that farmers are operating in a business environment. Council have an opportunity to provide advice and information workshops e.g. in terms of planning process and business needs to support the agriculture industry to adapt and grow as legislation changes, and demands of the industry evolve.

### Theme 8: Easy Access to Information/Leveraging Resource


An over-riding theme throughout discussions and interviews was the large volume of information, which a typical farm business has to process to operate effectively. With most farms under pressure to carry out the day-to-day tasks, there is little time for self-improvement and farm enterprise planning.

A key action which the council could undertake would be to make it easier for farmers to access the information they need - to create a one-stop-shop for farmers in the borough. This emphatically does not mean that the council should duplicate the work of the many organisations working in agriculture, but it does entail leveraging these organisations and enabling them to work together in the region to deliver advice and support more easily.

In order to raise the profile of the agriculture industry within the borough, there is a requirement for a communications and marketing plan, and a role for champions to assist raising the awareness and leading the strategic direction of agriculture in the borough.







SECTION 1

# Context and background to agriculture in the Armagh City, Banbridge and Craigavon Borough Council area



**“Farmers boots will still need to be seen in their fields (or warehouses), as they say, the best fertilizer is the farmers’ footprints in the paddock. But technology will make the most of those footprints.”**

Meg Kummerow, Owner of Fly the Farm





# 1.1 The strategic context for agriculture in Armagh City, Banbridge and Craigavon Borough

There are a wide number of non-market factors which affect the environment in which agriculture in the borough will operate.

## Independent Strategic Review of the Northern Ireland Agri-Food Sector – January 2022

The Independent Strategic Review of the NI Agri-Food Sector (ISRAF) explored the challenges and opportunities that the agri-food sector in Northern Ireland faces in 2021. The review outlined a series of eleven themed recommendations, including action points for the government and the agriculture industry to embrace. The heart of the message within the review is the importance of digital connection and data across the agri food supply chain.

## DAERA NI Food Strategy Framework - Food at the Heart of Society 2021

The draft Framework recognises the interconnectedness between food, health, the economy and the environment. It proposes a new strategic food systems approach for Northern Ireland, and sets out a long-term vision, high level principles and areas for strategic focus. The vision is a transformed food system that protects natural resources for future generations, is economically and environmentally sustainable and provides safe, nourishing, accessible food to people, who make informed healthy choices.

## Northern Ireland Executive Programme for Government (PfG) Draft Outcomes Framework 2021

The Northern Ireland Executive is currently developing a Programme for Government (PfG) Draft Outcomes Framework 2021. This framework consists of nine outcomes, aiming to improve wellbeing and create a picture of the kind of society we want to see. Out of the nine outcomes, five are relevant to the findings and recommendations of this Agriculture Strategy. 1. Our economy is globally competitive, regionally balanced and carbon neutral 2. We live and work sustainably protecting the environment 3. Everyone can reach their potential and 4. We all enjoy long healthy active lives 5. We have an equal and inclusive society where everyone is valued and treated with respect.

## NI Climate Change Bill 2021

The Northern Ireland Climate Change Bill 2021 will impact industry across Northern Ireland, including agriculture. The first part of the bill was approved in March 2021 and is now awaiting a date to be set for a second stage reading.

The Bill seeks to enable the mitigation of the impact of climate change in Northern Ireland, establish a legally binding net-zero carbon target to, provide for the establishment and powers of the Northern Ireland Climate Commissioner and Northern Ireland Climate Office and guarantee existing environmental and climate protections.

## Sustainability for Our Future – DAERA's Plan to 2050

DAERA have a strong influence on the direction of agriculture through setting future policy to which the industry must adhere. 'Sustainability for the Future - DAERA's Plan to 2050', released in May 2021 is to enable the Northern Ireland economy to grow sustainably through moving to low, zero or even net-negative carbon models.

The strategic priorities include:

**Economic Growth** - Enhancing our food, forestry, fishery and farming sectors using efficient and environmentally sustainable models which support economic growth.

**Natural Environment** - Protecting and enhancing our natural environment now and for future generations whilst advocating its value to and wellbeing for all.

**Rural Communities** - Championing thriving rural communities that contribute to prosperity and wellbeing

**Exemplar Organisation** - To be an exemplar, people focused organisation, committed to making a difference for the people they serve.

DAERA have a range of plans for the industry which are both dynamic and potentially transformational for both economic growth in farming and protection of the natural environment. Whilst these have not yet been released, they are likely to be extremely helpful to the industry as it moves into this new phase of producing both food and public goods. We urge the Council to support the uptake of the measures planned by DAERA and to be part of the constant flow of positive messaging around the programme.

## KPMG Climate Change Bill Impact Assessment

KPMG delivered a Climate Change Bill Impact Assessment which was prepared for the Northern Ireland agri-food Industry and painted a bleak picture if the bill were to be passed. It estimated to meet the requirements in carbon reductions, a fall in herd numbers by between 11% - 18% would be needed, with a negative impact to economic output between 8% - 66% and a corresponding drop in employment.

It's important to note that this report only discussed the impact at a farm level, and did not go into detail about the impact on other agri-businesses which would be effected.

## DAERA Future Agricultural Policy Framework Proposals for Northern Ireland – December 2021

The Department for Agriculture, Environment and Rural Affairs (DAERA) published a consultation on the Future Agricultural Policy Proposals for Northern Ireland in December 2021 emerging from the already published Future Agricultural Policy Framework Portfolio. The Framework charts the way forward for a future agricultural policy, presenting a range of policy proposals, programme work streams, measures, actions and initiatives being developed to achieve the four key outcomes; increased productivity, environmental sustainability, improved resilience and an effective functioning supply chain.

## DAERA Green Growth Strategy – October 2021

The Department for Agriculture, Environment and Rural Affairs (DAERA) on behalf of the Northern Ireland Executive published a consultation on the draft Green Growth Strategy in October 2021. The draft strategy identifies ten executive commitments and a series of high level Green Growth Principles to form a new approach to balance climate and the environment alongside the economic ambitions of Northern Ireland.

## A 10X Economy 2021 – NI Decade of Innovation

Released by the Department for the Economy in 2021, “A 10X Economy 2021 – NI Decade of Innovation” (10x) outlines a ten year plan to encourage greater collaboration and innovation to deliver a ten times better economy by focussing on innovation in areas where Northern Ireland has real strengths, including agri-food and agri-tech.

## EU Green Deal – Farm to Fork Strategy

The European Green deal is a group of initiatives designed to make Europe climate neutral by 2050. These initiatives aim to reduce greenhouse gas emissions by 50-55% for 2030 when compared to 1990 levels.

The Farm to Fork Strategy is at the heart of the European Green Deal aiming to make food systems fair, healthy and environmentally friendly. It aims to accelerate our transition to a sustainable food system that should: have a neutral or positive environmental impact, help to mitigate climate change and adapt to its impacts, reverse the loss of biodiversity, ensure food security, nutrition and public health and preserving affordability of food while generating fairer economic returns.

## The requirement for Carbon Neutrality in the UK by 2050

The UK has committed to carbon neutrality by the middle of the century, but there is a growing groundswell of opinion that action is required now and the Stormont Assembly is investigating methods of reduction. These methods are likely to include restrictions on livestock numbers, and the assembly is likely to reduce the timescales required for Carbon Neutrality.

Two alternative climate bills are currently progressing through the assembly, and regardless of which one is eventually passed, there will be considerable pressure on agriculture and agri-food to modify production processes and management practices to minimise the carbon cost of production. Agriculture in Northern Ireland is currently the largest emitter of greenhouse gases, producing 27% of Northern Ireland's total. Transport is next at 23%.

Agriculture is uniquely in the position that it can be part of the solution, rather than the problem, and the implication of mitigation strategies, new technologies, effective measurement etc. will all combine to move the industry towards a solution.

It appears highly likely that all farms will need to undertake a carbon audit, and that the results from farms will be combined to give an overall figure for the industry. This does mean that some farms will not reach the national carbon target individually and they will need to trade with other carbon absorbing farms to enable them to hit target. It seems inevitable that some form of carbon trading will emerge over the next decade.

It is also likely that instrumentation of the landscape will happen at a much more local level, directly measuring at catchment or even individual farm levels, meaning that challenge areas – or challenging farms – will be individually identified on a regular basis.

Some new forms of enforcement will be required, with the Scottish Environmental Protection Agency (SEPA) ‘three strikes and you’re out’ approach perhaps being the more effective with strike one being a warning, strike two giving a specified time for rectification of the problem (if it has not already been addressed) and strike three triggering a legal prosecution process.

## One Health

‘One Health’ is an approach to designing and implementing programmes, policies, legislation and research in which multiple sectors communicate and work together to achieve better public health outcomes.

Improved human health will become an increasingly important requirement from food and farming. The impact of diet on human health will come under increasing scrutiny and production methods will need to be altered to improve nutritional content and address key human health concerns.

In addition to improved nutritional content of food, the impact of production systems on the health of the environment will become increasingly important. Industry must reduce the impact of production on water and air quality, and must eliminate its role in antibiotic resistance. A large body of evidence links health conditions and premature death to environmental pollution.

Precision farming techniques are going to be vital in delivering against this agenda. Regardless of the enterprise type (plant based or animal based), the reduction in application of pesticides, slurries, manures, fertilisers can only be beneficial – to the point where only the exactly required amount of nutrient is applied and there is no nutrient loading of land. This is referred to as ‘nutrient neutrality’.

However, this optimisation of input is only workable if the baseline figures are known and that ongoing monitoring takes place. This includes knowing soil organic content, mineral content, chemical composition, plant growth rate, high risk run-off areas, water flows, and it needs this information to be geolocated (mainly using GPS coordinates). It also requires equipment which is capable of only applying nutrients to the required areas. Most farms in the ABC region are not fully equipped to deliver this just yet, but the capability is within the reach of all and it indicative of the type of equipment which will be purchased over the next decade.

## AFBI Strategic Targets

Agri-Food & Biosciences Institute (AFBI) is currently undertaking a scientific review as part of the AFBI Corporate Plan 2018 – 2022 and are establishing scientific targets for the next ten years. Ongoing horizon scanning will form part of the ongoing delivery, identifying upcoming technologies and practice which will enable the industry to hit the targets set for it. AFBI findings will be critical to the future success of the industry and efforts should be made to link key AFBI specialists with producers in the borough.

AFBI will be focusing on the development of holistic farming systems which deliver against production and environmental needs. Much of AFBI's work will be developed on practical farms and we suggest that the Council give support to the establishment of multiple units across the borough which are able to test and communicate findings to local farmers.

One of the key challenges around encouraging uptake of new science and practice in farming – which can at times be traditional – is the fear of failure. Not all new practices will work effectively on every farm. A farmer is often better at saying this to another farmer (rather than a researcher), and the Council can facilitate this ‘farm to farm’ transfer through a dedicated ABC Agriculture network, supporting farm walks, workshops, and knowledge hubs where other farmers can meet the researchers designing the work and the farmers who are implementing and modifying it at a practical level. This must be done in conjunction with other agencies (such as AFBI, CAFRE, AgriSearch etc.).



## Water Framework Directive

The DAERA website states that “the Water Framework Directive established a new integrated approach to the protection of the water environment. It was transposed into Northern Ireland through the Water Environment (Water Framework Directive) Regulations (Northern Ireland) in 2017. The regulations place a responsibility on Northern Ireland to try and ensure that all inland and coastal waters reach at least “good status” (or good ecological potential for artificial or heavily modified water bodies). The regulations use a five status classifications for waterbodies: high, good, moderate, poor and bad and allows for extended deadlines or less stringent objectives to be set for water bodies, should certain conditions be met.

To achieve the target of reaching good status or above, Northern Ireland is required to implement management planning at river basin level, linking with other key policy areas such as agriculture, land use, biodiversity, tourism, recreation and flood protection. This is done through the publication of a river basin management plan (RBMP) which sets out a programme of measures to be implemented over six-year cycles aimed at improving the status of waterbodies.”

The framework will continue to shape agricultural activity in the ABC area and methods of enabling the industry to manage run-off and obtain optimal nutrient balance is critical.

We have already commented on the need for farmers to be aware of water flows on their land (which the proposed DAERA LiDAR project will address), the need for precision application of slurries and fertilisers, and the potential for a network of central slurry management facilities. All of these will help to move the sector towards the water targets which have been set, and the Council can and should facilitate joint working with other organisations to move towards targets which are set.

## Sustainable Land Management Committee Recommendations

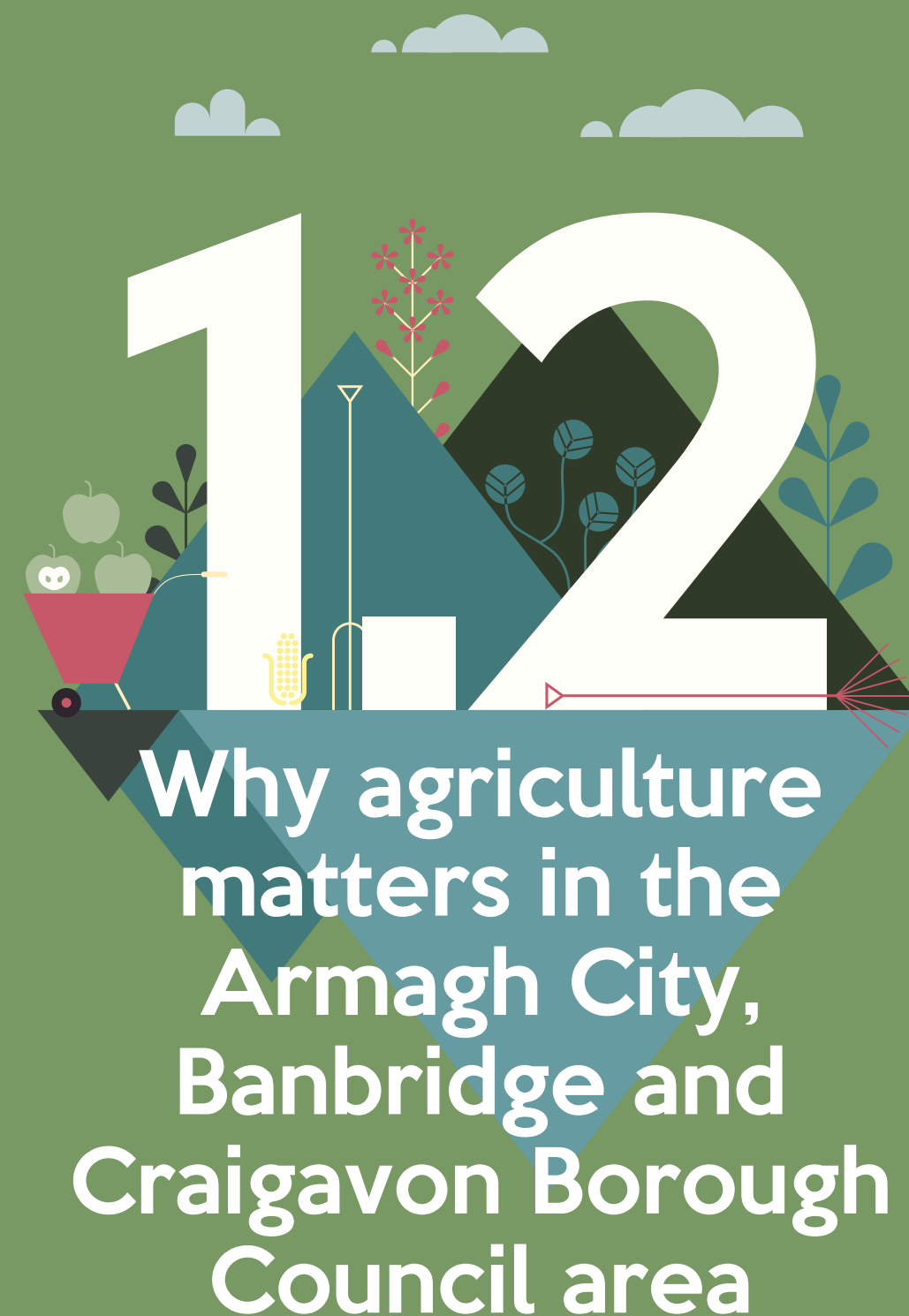
The Sustainable Land Management committee has produced ‘Delivering Our Future, Valuing Our Soils: A Sustainable Agricultural Land Management Strategy for Northern Ireland’ which includes a range of practical recommendations which should form part of good on-farm environmental management. These factors should be considered as part of the practical changes to be made on farms in the ABC area.

The Sustainable Land Management Committee published ‘Delivering Our Future, Valuing Our Soils: A Sustainable Agricultural Land Management Strategy for Northern Ireland’ in May 2018 and structured its findings and recommendations along five themes: Building a Baseline, Managing Soils More Effectively, Producing Improved Results, Enabling Achievement and Implementing the Vision. These demonstrate good on-farm environmental management and should be considered as part of the practical changes to be made on farms in the borough.

## Government of Ireland: Food Vision 2030 – A World Leader in Sustainable Food Systems

The vision of “Food Vision 2030” is that the Republic of Ireland will become a world leader in sustainable food systems over the next decade delivering benefits for the sector, society and the environment. “Food Vision 2030” has been developed by a cross-sectoral committee of agri-food stakeholders and envisages a pathway to a position of world leadership based on progressing the three pillars of sustainability: economic, environmental and social. It sets out four high-level missions to fulfil this ambition:

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



## 1.2 Why agriculture matters in the Armagh City, Banbridge and Craigavon Borough Council area

The agriculture industry has flourished in our borough due to the dedication of generational farmers and growers who have shaped our landscape and who are custodians of our countryside.

Agriculture is part of the largest Broad Industry Group Classification 'Agriculture, Forestry & Fishing', bringing over £376 million into the ABC Council area. Much of this is spent locally, enabling thriving rural economies and strong agricultural support businesses which supply goods and services to farms. Additionally, agriculture supports the presence of a large number of food processors in the region, ranging from artisan micro-businesses to large scale food processors. These businesses add further value to the income generated from agriculture.

Agriculture and agri-food are also efficient distributors of wealth, producing goods primarily for sale in populated urban centres, creating jobs and transferring finance to less populated areas.

Since 2015, council through the Food Heartland initiative has developed a strong offering and connection with the agri-food sector, but to a lesser degree with mainstream farming. Food Heartland has created a celebration of food in the borough, however now it is time for the borough to recognise and appreciate the farm level and the effort that goes into creating the ingredients for our producers enabling them to develop award-winning products.

Relevant to this study at a local level there are a range of strategies and plans, which highlight the priorities for ABC Council which include:

**The ABC Recovery and Growth Framework 2021** identifies agri-food as an area of focus: 'recognising margins are low and need to move up the value chain and operational investments for the future with a key priority to attract investment'. It refers to action to develop an agri-food strategy and continue investment for agri-food and agri-tech and seeks to reposition agri-food in the economy.

**The Mid South West Regional Economic Strategy** (MSW RES) through growth deal funding has an ambition to 'deliver sustainable food and farming solutions by 1. developing a centre for agri-tech innovation and 2. development of agri-food incubation space.'

One of the nine **Community Plan 2017-2030** priorities is 'A Enterprising Economy: Our borough is the centre of excellence for entrepreneurship, innovation and investment. It references that agriculture is one of the top three business sectors in the borough contributing to 29%.'

The **ABC Corporate Plan 2018-2023** under Enterprising Economy sets out a commitment to 'Ensure efficient connections to support enterprise and growth in urban and rural areas' recognising the importance of the agri-food as a growth sector.





# 1.3 An overview of the agriculture industry within Armagh City, Banbridge and Craigavon Borough Council

## Introduction

Armagh City, Banbridge and Craigavon Borough Council has a land area of circa 133,818.77 ha (143,598.05ha, including Lough Neagh). Farming uses approximately 80% of the land area in the borough and within Northern Ireland it has the fifth highest number of farmed hectares at 107,699. As such, it is a major contributor to the local economy, with an estimated value of over £376 million.

The largest farming enterprises within the ABC Council area are cattle and sheep (lowland and Less Favoured Areas) and dairy (table 3).

## Farming Enterprise Types in the Borough vs Other Council Areas

Armagh City, Banbridge and Craigavon Borough Council has 3,431 farming enterprises in the area which represents the fourth highest number (13%) of farming enterprises in Northern Ireland, behind Newry, Mourne and Down (16%), Mid Ulster (17%) and Fermanagh and Omagh (21%).

Out of the ten enterprises types measured in the Agricultural Census<sup>2</sup>, the borough leads in six farm enterprise types horticulture (58%), mixed (22%), cattle/sheep lowland (26%), cereal (21%), general cropping (16%) and other (22%). The borough is second in pigs (17%) and poultry (16%) and is third in dairy (14%).

In terms of farm business size, the borough has the highest number of large farms (270) in NI and the third highest number of small farms (374) and medium farms (165) in and the fourth highest of very small farms (2,622) in NI. Within the borough the balance of farm sizes are as follows: large 7.9%, medium 4.8%, small 10.9% and very small 76.4%.

Table 1

The following table shows how the borough compares to other Councils across Northern Ireland in terms of enterprise mix and as a proportion of Northern Ireland output as a whole.

	COUNCIL	% OF NI	CEREAL	GENERAL CROPPING	HORTICULTURE	PIGS	POULTRY	DAIRY	CATTLE/SHEEP	MIXED	OTHERS
Fermanagh and Omagh		20%	0%	14%	3%	9%	15%	19%	22%	3%	0%
Mid Ulster		17%	12%	14%	0%	26%	31%	16%	17%	18%	0%
Newry, Mourne and Down		16%	15%	15%	8%	14%	7%	10%	17%	13%	20%
Armagh City, Banbridge and Craigavon		13%	21%	16%	58%	17%	16%	14%	12%	22%	22%
Causeway Coast and Glens		10%	13%	10%	3%	6%	10%	13%	10%	13%	12%
Mid and East Antrim		7%	0%	6%	4%	8%	13%	8%	7%	5%	0%
Derry City and Strabane		7%	6%	6% *		8%	2%	7%	7%	6%	0%
Antrim and Newtownabbey		4%	2% *		3%	4%	4% *		3%	3%	0%
Lisburn and Castlereagh		3%	11%	7%	6%	5%	2%	4%	3%	7%	4%
Ards and North Down		3%	17%	6%	6%	0%	1%	0%	2%	7%	0%
Belfast		0%	0% *		*	0%	0% *		0%	0%	0%

ABC Council leads with the proportion of cereal, general cropping, horticulture, cattle/sheep (lowland) and mixed enterprises.

Horticulture, in particular is large, with 58% of NI's horticulture being in the borough. Apples and mushrooms represent a significant proportion of this. Total NI output value from horticulture (fruit, vegetables, mushrooms and flowers) was £95.4m, 48% of this is from mushrooms alone (£46m).

If we apply this formula to other sectors to which we can calculate value for using the 2020 agriculture census, over £376 million is being brought into the local economy by horticulture, dairy, pigs, poultry and general cropping alone (table 2).

2 DAERA 'The Agricultural Census in Northern Ireland' 2020



Table 2  
Northern Ireland agricultural incomes in 2020<sup>3</sup>

ENTERPRISE	NI VALUE	ABC % OF NI AGRICULTURE SECTOR	EST. ABC VALUE
Horticulture	£95,400,000	58%	£55,332,000
Dairy	£667,000,000	14%	£93,380,000
Pigs	£217,000,000	17%	£36,890,000
Poultry	£ 229,000,000	16%	£36,640,000
General cropping	£62,000,000	16%	£9,920,000
Cattle/sheep	£522,000,000	12%	£62,640,000
Est. total subsidy value	£624,806,636	13%	£81,224,863
			£376,026,863

An overview of farming enterprise types

Taken from the DAERA ‘The Agricultural Census in Northern Ireland’ 2020, table 3 below demonstrates the makeup of farming enterprises within the borough. Whilst horticulture represents 58% of the Northern Ireland total, it only accounts for 4% of the total farm types within the borough, cattle and sheep (lowland and LFA) is the largest farming enterprise followed by dairy.

Table 3  
ABC farming types by percentage<sup>4</sup>

ABC FARMING ENTERPRISES		
ENTERPRISE TYPE	NO OF ENTERPRISES	PERCENTAGE
Cattle/Sheep	2463	72%
Dairy	355	10%
General Cropping	178	5%
Horticulture	132	4%
Mixed	110	3%
Poultry	98	3%
Cereal	54	2%
Pigs	30	1%
Others	11	0%
ABC Total	3431	100%

Farming types in the ABC borough include the following:

**Cereal farming** is the growing of essential crops for a range of uses, including human food and livestock feed. Cereals (or grains), are members of the grass family and are cultivated primarily for their starchy dry fruits. Wheat, rice, corn, rye, oats and barley are common cereals.

**General cropping** is the growing of crops not categorized as cereals, such as turnips, carrots etc. Within the borough, general cropping is slightly higher than the national average at 5%, bringing in roughly £9.9 million (calculated pro rata from the NI figure) into the local economy. The borough is first in general cropping in Northern Ireland, accounting for 16% of NI farm enterprises.

**Horticulture** is the production of plants, mainly for food, but also for decoration or display for example cut flowers. The borough has a significant volume of horticulture, especially within the apple and mushroom industry. The Armagh Bramley Apple has been awarded Protected Geographical Indication (PGI) Status by the European Commission. Armagh City, Banbridge and Craigavon Borough Council’s horticulture enterprise is the only major player within Northern Ireland, accounting for 58% of the total NI sector and being worth just over £55m to the local economy when calculated pro rata. .

**Pig farming** is the raising and breeding of pigs for meat. Across the UK, there is an almost equal split between indoor and outdoor pig production. Due to Northern Ireland’s climate all pigs produced in ABC borough area are produced indoors. Slurry production from pig production is one of the key environmental challenges which need to be addressed by structural changes. Within the borough, pig farming is a very small enterprise in the borough (less than 1% of units), but still brings in a significant amount of income (just over £36 million).

**Poultry farming** farms chickens, ducks, turkeys and geese to produce meat or eggs for food. Within the borough, poultry farming accounts for just over 2.5% of the total farming output/units with a value of around £36 million. ABC Council ranks 2nd in Northern Ireland for poultry units. Poultry farming is a very useful additional enterprise for many small farms in the borough as it does not require a large area of land.

**Dairy farming** is the largest form of agricultural production in ABC Council area and ranks 3rd in Northern Ireland. Within the borough, just over 14% of the agricultural output is from dairy and is worth around £93 million to the borough.

**Cattle and sheep** farming is the raising and breeding of domestic cattle and sheep. It is a branch of animal husbandry. Within the borough, this is the largest farming enterprise, a massive 72% of the sector within the borough, bringing in just over £62 million. Unfortunately, it is the sector which also relies most heavily on the current farming subsidy, without which many cattle and sheep enterprises within the borough would be unviable.

Efficiency changes within this enterprise type can go some way to mitigating these losses, but it is reckoned that these farmers will need to participate heavily in any new carbon economy to ensure their continuing viability.

**The Equine industry** in Northern Ireland contributes approximately £212 million per year to the economy<sup>5</sup>, with associated employment of up to 3,300 full-time jobs. Unfortunately, at the time of writing, there are no figures available on a council level. The industry in Northern Ireland is represented by approximately 30 organisations from across the thoroughbred, sport, recreation, and breeding sectors, as well as educational organisations and ancillary services.

The research shows 25 stables/riding schools within the borough. Council welcomes horse riders into the borough at their facilities such as horse riding trails at Gosford Forest Park and Loughgall Country Park and eventing hire for private or club use at Silverwood Arena, Craigavon. Council would benefit by studying in more detail the economic contribution and benefits of this industry as it has such a broad spectrum, animal welfare issues and blacksmith skills shortages.

3 DAERA ‘Northern Ireland Agricultural Incomes in 2020’  
4 NB: Percentages calculated from figures taken from DAERA ‘Agricultural Census 2020’

5 DAERA/Dolittle ‘Analysis of the NI Equine Industry - Breaking new ground’ 2019

**Eel farming** including the ‘Lough Neagh Eel’ which has been awarded Protected Geographical Indication (PGI) Status by the European Commission. It is regarded by the local industry as a significant accolade recognising the heritage, tradition, and authenticity of what are regarded as the best quality eel available in Europe.

The largest producer of wild caught eel in Europe, Lough Neagh Fishermen produce around 400 tonnes of eel annually.

**Beekeeping** is not an activity which DAERA keep track of, so getting local information can be a challenge. However within the ABC Borough Council there is one local association, the Dromore Beekeepers Association, which boasts around 160 members, who are mostly dedicated hobbyists, with only one commercial venture (bees wax candles) being noted.

**Social farming** is an innovative use of agriculture to promote therapy, rehabilitation, social inclusion, education and social services in rural areas, and their development is a key objective for Rural Support. There are multiple benefits from social farming for both the individuals involved and the rural economy. It can provide much needed company for the farmer, while making it easier to get jobs done with the aid of enthusiastic volunteers. There are currently two social farms in the borough, McDermott’s Little Acres Farm in Armagh and Heath’s Farm in Banbridge.

### Farming income by enterprise in the borough

In 2020, there were a total of 3,431<sup>2</sup> farming enterprises in the area, employing 7,495 people in full-time, part-time and casual roles.

As discussed earlier, agriculture brings approximately £376 million into the ABC Council area. This is a combination of the sales value of farm produce and the value of subsidy payments. However, income does not necessarily translate into profit and table 4 shows the actual profitability of each sector.

**Table 4**

Farm business incomes in Northern Ireland<sup>6</sup> including and excluding direct payments in 2019/20 (£ per farm)\*

ENTERPRISE TYPE	FARM BUSINESS INCOMES	DIRECT PAYMENTS	FARM BUSINESS INCOMES MINUS DIRECT PAYMENTS
Cereals	30,440	24,327	6,113
General cropping	2,964	12,345	-9,381
Pigs	59,728	3,902	55,826
Dairy	51,803	23,586	28,217
Cattle/sheep <sup>7</sup>	27,113	48,318	-21,205
Mixed	30,029	30,507	-478
All Types	25,935	24,774	1,162

\*Based on data from identical sample of farms

It can be seen that the majority of sectors are profitable without direct payments, but concerningly, the figures reveal that 72% of the borough’s agricultural output (cattle/sheep, both LFA (Less Favoured Areas) and lowland) is dependent on direct payments to end the year profitably. When asked in the Farmers Survey ‘Without subsidy, would your farm business income be viable? 67% of respondents replied no,

22% yes, and 11% did not know. This is not surprising and reflects what is happening across Northern Ireland as a whole. It is worth noting that the two sectors which receive the most subsidy are the sectors which are least profitable, and many in the industry believe that the long term support received by the sector has gradually reduced the incentive to take up new practice and techniques.

Changes to the agricultural payment structure are imminent and it is envisioned that the cattle and sheep sectors will still receive support, but this will be targeted at delivery of public goods which will be focused on environmental improvements.

This will require skills training and effective knowledge exchange to encourage the uptake of more efficient farming practices which will enable the sector to become more profitable and sustainable. In addition, the current drive for sustainable farming is not supported by an equivalent amount of advice and support. Many farmers do not take action because they are unsure of what the key challenge areas on their farm are and, if they do know this, they are unsure about the correct response to take. Non-financial support and advice is required in this area as well.

### Environmental Farming Scheme

The introduction of the Environmental Farming Scheme (EFS) in January 2022 will impact enterprises within the borough. The EFS is a voluntary scheme that will support farmers and land managers to carry out environmentally beneficial farming practices on agricultural land. EFS agreements normally have a five year duration, and aim to:

- Foster carbon conservation and sequestration in agriculture; and
- Improve water management and water quality
- Reduce greenhouse gas and ammonia emissions from agriculture.
- Reduce soil erosion and improve soil management
- Restore, preserve and enhance biodiversity

The EFS comprises three levels:

- EFS(W), a Wider Level Scheme aimed at delivering benefits across the wider countryside outside of environmentally designated areas;
- EFS(H), a Higher Level Scheme primarily aimed at site specific environmental improvements at strategically important sites and for priority habitats and species; and
- EFS(G), a Group Level Scheme to support co-operative work by farmers in specific areas, such as river catchments, or commonages. EFS(G) is in pilot stage.

Each EFS level has a suite of management options and non-productive investments (NPIs), commonly referred to as capital items. Management options may be made up of:

Essential capital items (NPIs) carried out to establish the Option, and / or

Recurring annual management requirements to ensure successful establishment, retention and maintenance of the Option.

Payment for the essential NPIs is included in the Option payment for Year 1 of the agreement. Some Options contain only recurring annual management requirements. Work started or completed before the start of the Scheme agreement is not eligible for payment. There is also a group of additional NPIs, which can be carried out to complement certain Options. Payment for these is in addition to the Option payment for essential NPIs.

<sup>6</sup> DAERA ‘Farm Incomes in Northern Ireland 2019/20’

<sup>7</sup> Combined Lowland & LFA figures from DAERA ‘Agricultural Census 2020’



Employment in agriculture

Armagh City, Banbridge and Craigavon Borough Council has the 4th highest number (7,495<sup>2</sup>) of farmers and spouses in Northern Ireland. Due to the large labour intensive horticulture enterprises in the county, we have by far the largest amount of other labour (742 Full Time, 568 Part-Time and 961 Casual in 2020), and the third highest number of agricultural labour.

Agricultural workers in Northern Ireland are entitled to the Agricultural Minimum Wage, rather than the National Minimum Wage, unless it or the National Living Wage is higher. Grades range from Grade 1 (£6.95/hr) through to Grade 6 (Farm management, £10.95/hr). According to DAERA, at an individual farm level average incomes were expected to increase from an average of £25,935 in 2019/20 to £33,039 in 2020/21, representing an increase of 27%.

DAERA Farm Labour Statistics NI updated April 2020, indicated that the Northern Ireland total farmers, spouses and other workers are represented by 78.4% male and 21.6% female within the agriculture industry, there are no figures that this time at the borough level. The industry remains male dominant at a national level and assumptions could be made that the trend is similar within the borough.

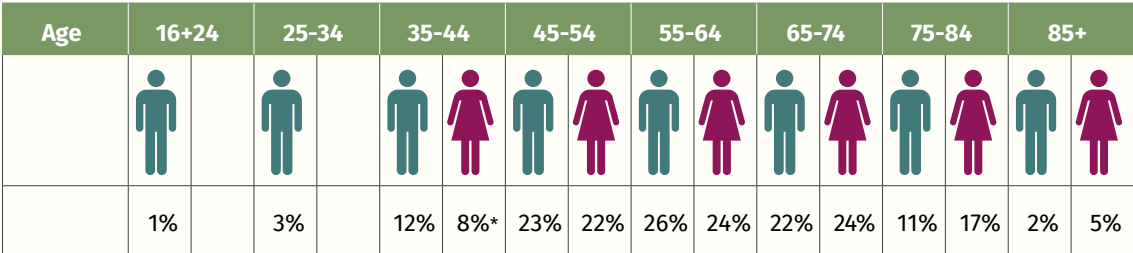
Demographics in farming

As a whole, farming has always been a male dominated industry, at least in terms of the physical labour employed. According to the 2016 EU Farm Structure Survey, from 2005 - 2016, on average 76% of the agricultural labour force was male, and 24% were female. In absence for any borough specific demographics for farming, we are reliant on what we can learn from the 2011 census.

More than nine out of ten farm business owners are men<sup>8</sup> (9% Women, 91% Men) with nearly half are aged 60 years or older. This could be because while men are generally classified as farmers and do the physical labour, there are likely to be a large proportion of women who work on the farm, and also undertake record keeping who are not classified as such. In the future, daughters inheriting farms may have an impact on this figure.

Three in ten farm business owners report a disability, and nearly three quarters are married<sup>8</sup>. Female farmers have an older age profile than male farmers<sup>8</sup>, whose average age is 58. This may be due to inheritance following the death of a spouse.

Figure 1 - Age profiles in farming



\*under 45

Mid South West Region figures

The Mid South West (MSW) Region consists of ABC Council, Fermanagh and Omagh District Council and Mid Ulster District Council, and is the powerhouse of NI agriculture. With over 13,000 farm holdings and over 25,000 employees, it represents half the overall agricultural holdings in NI.

Table 5  
Farm enterprises in MSW Region vs the rest of NI<sup>9</sup>

	% OF NI	CEREAL	GENERAL CROPPING	HORTICULTURE	PIGS	POULTRY	DAIRY	MIXED	OTHERS	SHEEP/CATTLE
MSW	50%	33%	45%	62%	53%	61%	49%	44%	22%	51%
Rest of NI	50%	65%	50%	29%	46%	39%	42%	56%	36%	49%

Table 6  
Breakdown of farm enterprises in MSW Region<sup>2</sup>

COUNCIL	% OF NI	CEREAL	GENERAL CROPPING	HORTICULTURE	PIGS	POULTRY	DAIRY	CATTLE/SHEEP LFA	CATTLE/SHEEP LOWLAND	MIXED	OTHERS
Fermanagh and Omagh	20%	0%	14%	3%	9%	15%	19%	29%	1%	3%	0%
Mid Ulster	17%	12%	14%	0%	26%	31%	16%	16%	19%	18%	0%
Armagh City, Banbridge and Craigavon	13%	21%	16%	58%	17%	16%	14%	7%	26%	22%	22%
MSW	50%	33%	45%	62%	53%	61%	49%	52%	46%	44%	22%

When the pro-rata formula is applied to these figures, over £1 billion is being contributed to the local economy by primary agriculture across the council areas that make up the MSW Region.

8 2016 EU Farm Structure Survey

9 NB: Percentages calculated from figures taken from DAERA ‘Agricultural Census 2020’

Food and drinks processing sector - NI

According to DAERA, Northern Ireland Food and Drinks Processing Sector Statistics 2019, the total gross turnover of the sector is estimated to have increased by 3.7% in 2019 to £5.365 million, with 24,945 full time employees in 2019. Provisional estimates for 2020 project a 0.2% rise in employment. The value added by the sector increased by 7.0 per cent to £998 million between 2018 and 2019. The food and drinks sector contributed 36.8 per cent to total manufacturing sales in 2019.

Beef and sheep meat and, milk and milk products are the largest sub sectors in terms of gross turnover. However, their combined share of total gross turnover decreased by 1.1% from 2018, which bodes well for the MSW Region as it holds a large proportion of these enterprises.

Eight out of the ten sub sectors recorded an increase in their levels of gross turnover between 2018 and 2019.

Table 7  
Gross turnover, by subsector, 2018 and 2019<sup>10</sup>

	GROSS TURNOVER (£ M)		(%) CHANGE
	2018	2019	18/19
Animal By-Products	46.6	45.1	-3.3
Bakeries	376.9	405.6	7.6
Beef and Sheep meat	1437.6	1390.3	-3.3
Drinks	419.5	449.1	7.1
Eggs	182.0	189.8	4.3
Fish	89.2	92.6	3.8
Fruit and Vegetables	366.5	393.3	7.3
Milk and Milk Products	1142.8	1227.7	7.4
Pig meat	365.8	400.1	9.4
Poultry meat	745.4	771.6	3.5
<b>Total sector</b>	<b>5172.3</b>	<b>5365.2</b>	<b>3.7</b>



An overview of  
agribusinesses in  
the borough

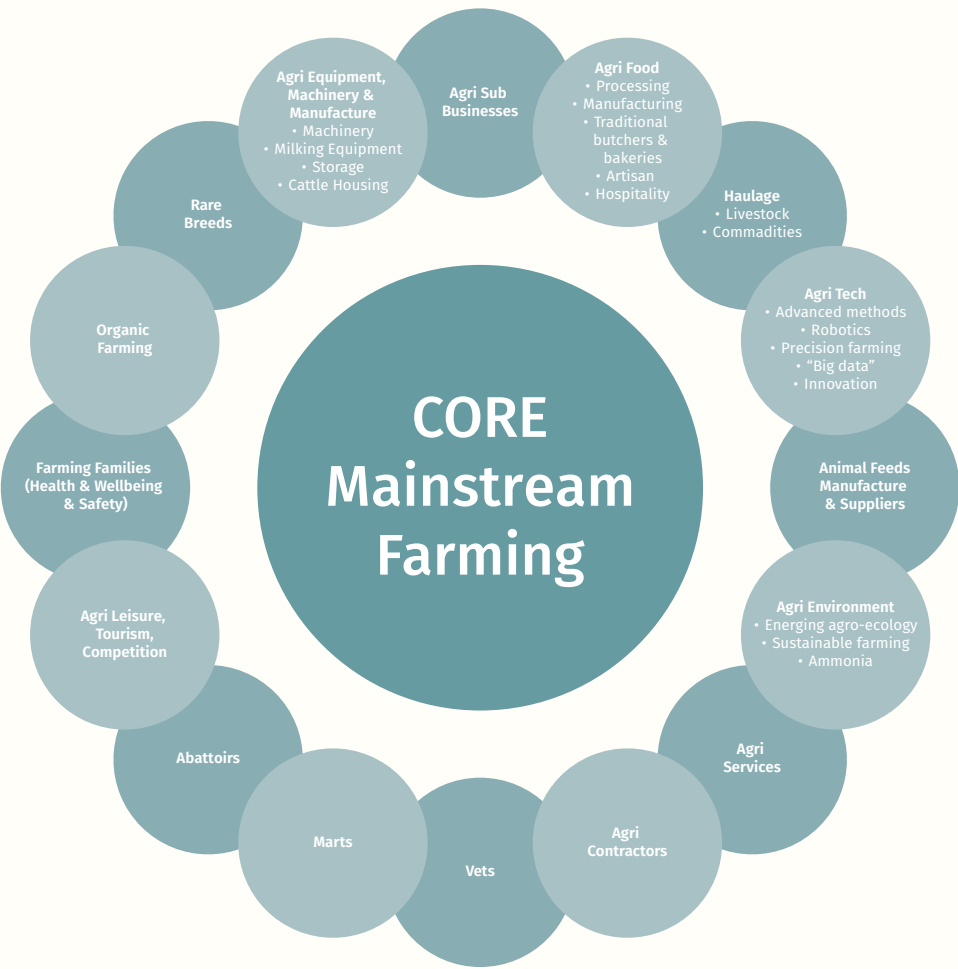
10 DAERA 'Northern Ireland Food and Drinks Processing Sector Statistics 2019'



# 1.4 An overview of agribusinesses in the borough

In addition to the farms in the borough, a scoping exercise identified over 265 businesses<sup>11</sup> which are dependent on, or significantly impacted by the agriculture industry. These range from equipment suppliers through food businesses, and have a symbiotic relationship with primary agriculture, with each being mutually supportive of each other. The Food Heartland Action Plan using appropriate sector codes calculated that, there are 876 producers employing 15,221 people.

Figure 2 - Business interaction with core mainstream farming

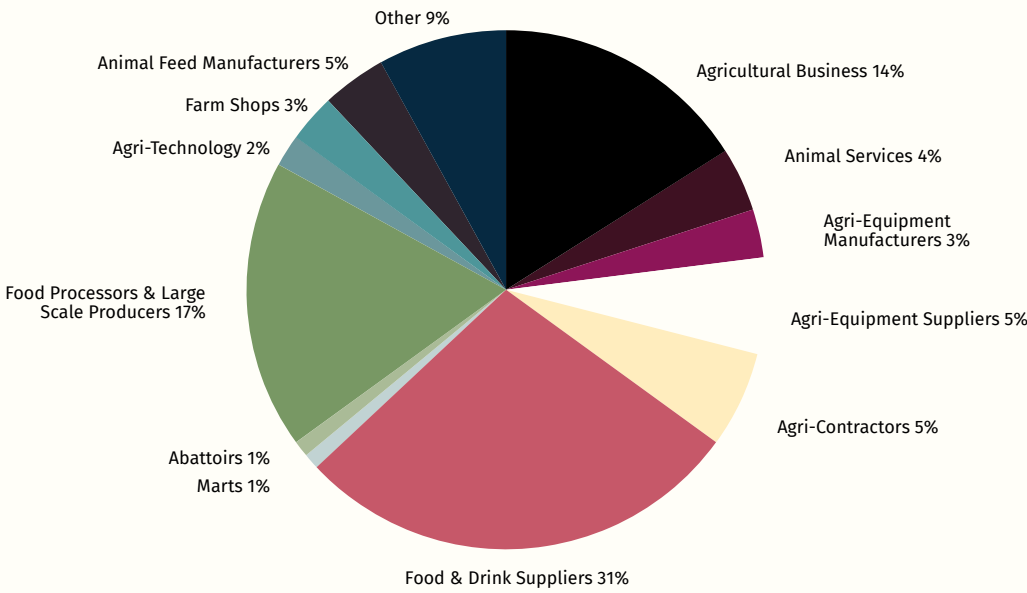


It is difficult to estimate the total financial value of the each of the identified businesses, but it is clear that it is substantial.

Figure 3 shows the percentages of the different businesses which are dependent on, or significantly impacted by primary agriculture.

11 Appendix Three

Figure 3 - Agribusinesses in the borough



The businesses and description are shown in table 8 below, with a full listing in Appendix 4.

Table 8

BUSINESS TYPE	AMOUNT	BUSINESS DESCRIPTION
Agricultural business	38	Businesses such as feed and equipment suppliers who rely on the agriculture industry.
Animal services	11	Businesses which treat animals, including veterinary practices, hoof-trimming services etc.
Agri-equipment manufacturers	7	Businesses which manufacture some type of agricultural equipment.
Agri-equipment suppliers	14	Businesses which supply agricultural equipment manufactured by someone else.
Agri-contractors	14	Contracting businesses which deliver services on-farm (such as silage contractors or hedge cutting services).
Food and drink suppliers	83	Businesses who sell food in the region.
Marts	2	Businesses which enable farming trade, mainly livestock.
Abattoirs	2	Businesses which slaughter animals and process the meat.
Food processors and large scale producers	45	Businesses which receive agricultural goods and further process them.
Agri-technology	6	Technology suppliers to the agriculture industry such as agri-tanks etc.
Farm shops	8	Shops which sell produce direct from farm or some other type of artisanal product.
Animal feed manufacturers	12	Businesses which manufacture feed for livestock.
Other	23	Includes food packaging, baking equipment etc.
Total	265	

Agri-food tourism

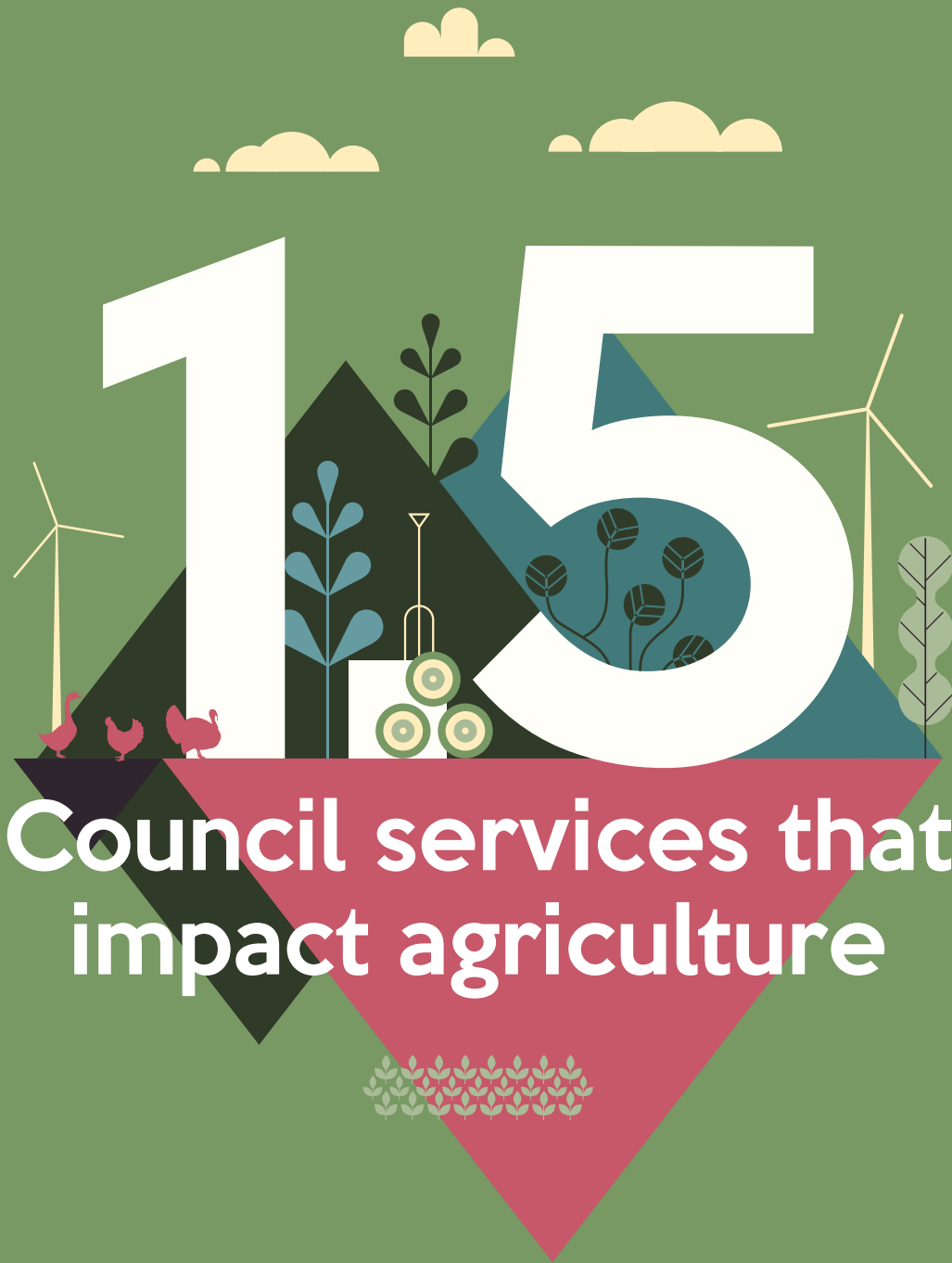
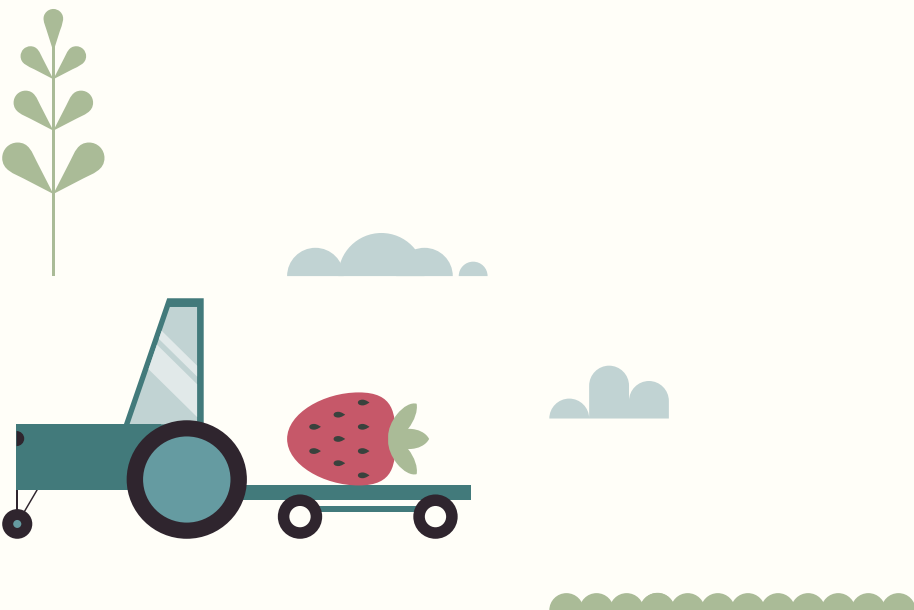
In 2019, 1.6 million visits were made to visitor attractions in ABC Council area. 62% of these visitors to the area were NI residents on a day trip. The local tourism landscape in the area is more oriented towards local day trippers, with Tannaghmore Gardens & Rare Breeds Animal Farm, and Oxford Island being the most visited top attraction. Visitors to the borough brought in £27 million worth of revenue to the local economy, with an average spend of £149 per trip.

Research has shown that visitors position food and drink as one of the top five factors when choosing a destination, to the tune of £350 million per year in NI. Tourism NI note that the Food Heartland has been instrumental in raising the profile of food and drink in the area, in addition to promoting collaborative working across a range of businesses.

The council is leading the development of an Armagh Apple Orchards Tourism Experience Cluster. The aim of the initiative is to bring together businesses and other partners to co-develop a holistic experience for visitors to help drive economic growth while engaging with orchard farmers and cider makers to encourage visitors to their premises by growing their visitor offering and experience.

The council contribute to food tourism through the successful delivery of borough wide food tours as well as the signature Food and Cider Festival in September each year. Other signature events such as Georgian Festival, Christmas Twilight Markets and St Patrick's Day Festival all incorporate food pavilions and food traders to showcase local produce.

An increased focus on environmental enhancement at farm level will be driven by the changes to farm support, and this is likely to be highly beneficial to agri-food tourism in the region.





## 1.5 Council services that impact agriculture

A range of council services have an impact on agriculture and agri-food. Optimising the relationship between the council and the businesses is key to maximising economic, environmental and social returns, and leveraging services which already exist will accelerate progress. The following services have a part to play in this:

### Food Heartland

The Food Heartland Initiative was developed in April 2015 to specifically promote the agri-food sector in the borough during the Northern Ireland Year of Food and Drink in 2016. Throughout the year, Food Heartland incorporated a series of themed events and initiatives to showcase excellence in agri-food production in the borough, including the Food and Cider Festival and Food Heartland Awards, which was underpinned by various marketing initiatives.

The Food Heartland Forum provides a unique platform for the council to work closely with agri-food businesses and various support bodies to drive the local agri-food sector forward. From food and drink producers to businesses involved in the wider supply chain, the forum is focused on developing a strong voice for the local agri-food sector and facilitating opportunities to lobby on key sector issues.

The collaborative initiative meets regularly and is committed to ensuring engagement and representation from key policy stakeholders including: Food NI; Northern Ireland Food and Drink Association (NIFDA); Southern Regional College (SRC); Agri-Food and Biosciences Institute (AFBI); College of Agriculture, Food and Rural Enterprise (CAFRE); and the Department of Agriculture, Environment and Rural Affairs (DAERA).

Food Heartland has a visible presence at events like Country Comes to Town and numerous stands in the food pavilion at Balmoral Show, bringing the Food Heartland brand to a wide audience, along with the work done within the borough for producers via the Food Heartland Forum and eateries via the Hospitality Forum.

Food Heartland is committed to helping support the growth and development of the abundance of specialist artisan food and drink producers within the borough, and is currently delivering a £50,000 action plan to support agri food.

### Tannaghmore Farm

Tannaghmore Farm is a council owned site and facility, hosting Ireland's only Rare Breeds Survival Trust Approved Conservation Farm. Set on a 5 acre site, it hosts between 115,000 to 130,000 visitors per year and does not charge for entry.

There are a wide variety of rare breeds on site, including a herd of 48 Pedigree Irish Moiled, Dexter, Kerry and Shetland cattle, Galway and Jacob sheep, Bagot and Pygmy goats, horses, donkeys, various poultry (such as Dorkings, Minorcas, Orpingtons, Sussex, Naked Necks, Rhode Island Reds, Indian Game), Bourbon Red turkey, various waterfowl (Indian Runners, Muscovy, Black East Indian, Call, Aylesbury) and Sebastopol, African & Chinese geese.

Staff at the Tannaghmore Farm are CEVAS Accredited, and during non-covid times interact with between 1500 - 2000 school children per year, educating to National Curriculum standard Key Stage 1 and 2. They also host work placement students from South Regional Colleges agriculture programme.

### Conservation

Conservation is at the forefront of what happens at Tannaghmore Gardens. They have ongoing breeding programmes, and are working with new at risk breeds (Bagot goats & Kerry cattle). The rare breeds aspect is promoted through shows and open days which raise awareness with the general public.

Such is the expertise, the staff assist with genetic DNA research, and are currently working with RBSTNI boar at Deerpark AI Centre for semen bank collection. Cross -border links have been forged with National Parks and Wildlife Service on an Irish Rare Breeds Society Project with Roscommon Sheep and have ongoing work with the Rare Breeds Survival Trust.

### Conservation Grazing

The farm works with the Councils Conservation Department to manage approx. 300 acres of species rich grass lands such as Oxford Island National Nature Reserve, Turmoyra Marsh, Silverwood Farm, City Park and various other sites. These lands are used for grazing Irish Moiled, Dexter, Kerry and Shetland cattle as well as donkeys and sheep. Plans are in development to use Bagot goats on selected sites.

### Key Objectives

Current plans include the implementation of the Tannaghmore Rare Breeds Animal Farm Masterplan, and the further development of the links with the RBST and other conservation organisations. Other key objectives include; converting the farm to as near as possible 100% rare breeds, continue to raise awareness of the plight of rare breeds, engaging the next generation, seeking further funding for new opportunities and the development of the site as a centre of excellence. Tannaghmore is a working farm and has an expertise in Rare Breeds which is not found in many other places. The staff are experienced in working with farmers. Tannaghmore farm has the potential for use in transfer of knowledge around environmental practice in the ABC borough area, with a focus on practical farming.

### Summary

Tannaghmore Farm is a strong asset, but it does not currently provide advice to external businesses. However, the upcoming changes to farm support mean that farmers are going to require advice on implementation of best environmental practice. Tannaghmore could form a base from which knowledge transfer could take place.

### Mid South West Growth Deal

The Mid South West (MSW) Region is a collaboration between Armagh City, Banbridge and Craigavon Borough Council, Fermanagh & Omagh District Council and Mid Ulster District Council. The region has significant strengths in manufacturing, engineering, agri-food, life and health sciences, tourism, construction' and many more sectors where an innovative, collaborative nature means we are considered leaders in a competitive global market. From dynamic indigenous companies to blue chip inward investors to boundary-breaking start-ups, our economy plays host to a rich ecosystem.

Mid South West provides 214,000 workplace jobs, 90% of which are taken up by local people, and generates one fifth of Northern Ireland's entire GVA.

The MSW Regional Economic Strategy identifies two key interventions linked to supporting innovation in the Agriculture industry; 1. Developing a centre for agri tech innovation and 2. Development of agri-food incubation space.'

The MSW Growth Deal presents an opportunity for investment in the agri tech and agri food as key growth sectors.

### SOAR

SOAR (ABC) is a Local Action Group that works with the Department of Agriculture, Environment & Rural Affairs (DAERA) to deliver Priority 6 LEADER Schemes of the Northern Ireland Rural Development Programme (NIRDP) 2014-20 in the Armagh City, Banbridge and Craigavon Borough Council area. SOAR

(ABC) has a budget of £8.02 million to administer the strategic objectives set out in our approved Local Rural Development Strategy and provided grants under the following measures;

**Rural Business Investment Scheme - Budget £2.78m**

Purpose: To increase economic activity and employment rates in the wider rural economy through encouraging and supporting the creation and development of micro and small enterprises in the broader rural economy including on-farm diversification into non-agricultural activities and private tourism provision.

**Rural Basic Services Scheme- Budget £1.38m**

Purpose: To improve and maintain the living conditions and welfare of rural dwellers through the provision of more and better basic services.

**Village Renewal Scheme - Budget £1.92m**

Purpose: To regenerate villages and their surrounding areas by improving their economic prospects and the quality of life.

**Co-operation Measure - Budget £0.5m**

Purpose: To encourage co-operation between Local Action Groups throughout the EU and specifically to encourage cross-border collaboration.

**Rural Policy Framework**

DAERA has launched a draft Rural Policy Framework for public consultation in July 21. The new framework aims to create a sustainable rural community where people want to live, work and be active. The framework focuses on five thematic pillars, as detailed below, and will be a living document, flexible enough to respond to emerging rural issues as they happen such as the current global COVID-19 pandemic. It is envisaged that a Rural Business and Community Investment Programme will emerge from the framework.

- Thematic Pillar 1: Innovation & Entrepreneurship
- Thematic Pillar 2: Sustainable Tourism
- Thematic Pillar 3: Health and Wellbeing
- Thematic Pillar 4: Employment
- Thematic Pillar 5: Connectivity

**Planning Services**

The Planning Authority is important to agriculture. There is a need for ongoing development across the industry and this development often involves the need for additional buildings or structural changes. Most of this requires planning permission and planning policies and regulations (and associated Environmental and Conservation Regulations) can often restrict the development which can take place. Additionally, over the next decades, new types of farming or farming related enterprises will be implemented which will require approval of novel facilities.

During 2019/20, out of the 59 Agricultural planning applications received by the Council, and 20% were for retention of existing buildings - meaning that plans were not passed before they had been built. The farmers survey showed that 10% of respondents found the planning process easy, 11% find it hard, and 13% thought it was very hard. There may be an opportunity here to engage with farmers and businesses prior to submission to ensure they understand the process.

Economic development often requires structural change and the planning system should positively and proactively facilitate development that contributes to a more socially economically and environmentally sustainable Northern Ireland, while the farming sector must work within the designated constraints.

The generation of a strong relationship between planning and the farming industry will enable more efficient and controlled development through preventing applications which will not succeed and provision of sound advice to those which have strong potential.

**Environmental Health**

Environmental Health is responsible for ensuring that nuisance from industry (including agriculture and agri-food) is minimised. Councils have a duty to investigate complaints which may constitute a statutory nuisance. Environmental Health Officers may interact with farming in a number of instances. They are invited as a consultee for specific planning applications, during consideration of diversification options, understanding environmental impact, food standards or, if a complaint has been received. Environmental Health can provide advice to farms or agri-food business on a range of topics.

There is the opportunity for Environmental Health to become more aware of new types of development in agriculture and to understand how to best understand the challenges which the new enterprises will present, and the best ways to address them.

Environmental Health receive applications from new food business who seek to be registered or approved. All food businesses which handle, prepare or sell food are legally required to be registered with their local council. Food manufacturers handling products of animal origin may need to be approved by the local authority or the Food Standards Agency, rather than registered. These include establishments, for example who make meat preparations, minced meat and cooked meat products. The department also conduct regular site inspections as part of the Food Hygiene Rating Scheme.

Environmental Health were consulted and advised that there is an opportunity to provide more education to agri-food businesses in relation to adhering to food safety and hygiene, standards, regulations, HACCAP, allergen advice, food labelling and as issues arise. In 2020, the department received 249 new business registrations because of start up food businesses at home in the Covid Pandemic.

**Farm Watch Scheme**

Farm Watch scheme is organised through the PSNI and ABC Policing and Community Safety Partnership (PSCP) which operates in a similar way to a Neighbourhood Watch scheme. The scheme is run for, and by, members of the farming community and is supported by the police. This allows PCSP to share information about criminal, anti-social and suspicious behaviour in the local area to prevent crime.

The aims of the scheme are to: 1. Increase the prevention and detection of farm related crime 2. Increase community engagement between individual members, the police and other farming related groups 3. Reduce the fear of crime in your community.

**The benefits of being a member of the Farm Watch Scheme include;**

- Access to Armagh, Banbridge and Craigavon Text Alert (early information regarding crimes or suspicious behaviour)
- Advice on how to report suspicious activity
- Details on how to register your property and search for details of stolen property prior to buying farm equipment
- FREE Farm Watch Signage
- FREE Selecta DNA property marking for equipment and stickers for your premises showing that you are a member of a PSNI supported scheme
- FREE trailer marking
- Information about security products that reduce theft and increase the chance of offenders being caught
- Visit by the PSNI Crime Prevention Officer who will provide information



### Community Development: Health Inequalities Programme

The focus of the work is based on emerging health inequalities and linkages to priorities identified through the Community Plan. The project targets sectors of the community that experience health inequalities, areas of disadvantage, populations not targeted by other programmes, those that are socially disadvantaged and those that experience the worst outcomes in health. The outcome being to reduce health inequalities and build community capacity, supporting communities to develop their own intrinsic assets/resources for health outcomes. Funding from the Public Health Agency comes down through a funding stream within the PHA for Community Development and the principal objectives are;

- Community engagement and capacity building
- Public health messaging
- Support partnership and community response to COVID-19
- Tackling Health Inequalities (Physical and emotional health and wellbeing) through Community Planning, addressing health inequalities with local delivery agents for: BAME communities; people with drugs and alcohol issues; people living in poverty; older people and men
- Workplace health

#### The Health Improvement Workers (Inequalities) (HIWs)

- Deliver Take 5 Ambassador Training
- Develop and facilitate targeted programmes using statutory and C&V providers including IFHOs
- Provide liaison between communities, council and the health sector to identify barriers and improve access to services

#### The Investing for Health Officers (IFHOs)

- Deliver emergency life support skills and co-ordinate AEDs across Council facilities
- Deliver programmes on a range of mental and physical health issues
- Support Council workplace health initiatives and promotion, sitting on the Workplace Health and Wellbeing Committee, promoting health and wellbeing and delivering interventions for staff

Cross departmental working is key to the success of the work and officers work closely with a number of departments across Council as well as statutory, community and voluntary service providers. The officers also sit on a number of partnerships to support a co-ordinated approach to health and wellbeing across the borough.



# 1.6 Wider services that impact agriculture

## Agricultural support and development

### AgriSearch

AgriSearch was formed in 1997 to provide a mechanism through which beef, dairy and sheep farmers could have direct involvement in production orientated research. Funds contributed to AgriSearch are used to commission research into the improvement and development of beef, sheep and dairy farming and to accelerate knowledge transfer.

### Agri-food & Biosciences Institute (AFBI)

The Agri-Food and Biosciences Institute (AFBI) is a multi-disciplinary organisation with around 700 staff involved in high technology research and development, diagnostic and analytical testing for DAERA and other Government departments, public bodies and commercial companies in Northern Ireland, and further afield.

### Agri Food Quest

Agri-Food Quest provides funding and support for business research and innovation projects that aim to the agri-food industry in Northern Ireland. It is open to all agri-food businesses in Northern Ireland and to companies outside Northern Ireland that will contribute to the local economy.

### Countryside Services Ltd

Countryside Services was established in 1998 to provide a range of information, commercial and professional services to the farming and rural community in Northern Ireland.

### Department of Agriculture, Environment and Rural Affairs

The Department of Agriculture, Environment and Rural Affairs (DAERA) has responsibility for food, farming, environmental, fisheries, forestry and sustainability policy and the development of the rural sector in Northern Ireland. The Department assists the sustainable development of the agri-food, environmental, fishing and forestry sectors of the Northern Ireland economy, having regard for the needs of the consumers, the protection of human, animal and plant health, the welfare of animals and the conservation and enhancement of the environment.

### The Farm Safety Partnership

The Farm Safety Partnership (FSP) is made up of key stakeholders with an interest in farm safety. The Farm Safety Partnership aims to increase awareness of farm safety and to reduce work-related fatalities and injuries on Northern Ireland's farms.

### Linking Environment and Farming (LEAF)

LEAF work closely with producers, providing them with the right tools and services to make meaningful changes on the ground and inspiring retailers and consumers in the pursuit of a more sustainable and resilient food and farming chain.

## Lobbying and representation

### Horticulture Forum NI

The Horticulture Forum is an umbrella organisation that supports a stronger horticulture industry in Northern Ireland. They encourage communication between all the horticulture sectors, sharing their issues and their expertise, and making effective joint representations to Government on behalf of the whole industry.

### Livestock and Meat Commission

The Livestock and Meat Commission for Northern Ireland (LMC) is an Executive Non-Departmental Public Body, which assists with the development of the livestock and livestock products industries. LMC's sponsor body is the Department of Agriculture, Environment and Rural Affairs (DAERA).

### Lough Neagh Fishermen's Co-operative

The Lough Neagh Fishermen's Co-operative represents wild eel producers for decades and is recognised as the largest producer of wild caught eel in Europe, producing around 400 tonnes of eel annually.

### National Pig Association

The National Pig Association is the representative trade association for British commercial pig producers and is allied to the NFU and represents the pig interests of NFU members.

### Northern Ireland Meat Exporters Association (NIMEA)

The NI Meat Exporters Association represents the interests of major meat processors and exporters in Northern Ireland.

### Northern Ireland Soft Fruit Growers Association

NI Soft Fruit Growers Association represent the soft fruit growers in Northern Ireland.

### Ulster Farmers Union (UFU)

The Ulster Farmers' Union (UFU) is the largest democratic voluntary organisation representing farmers and growers in Northern Ireland. Its central objective is to promote their interests both at home and abroad through professional lobbying. There are a number of local UFU branches across the ABC Borough.

### Young Farmers Clubs of Ulster

The Young Farmers' Clubs of Ulster (YFCU) is an association of local clubs run by young people for young people. It welcomes members from all communities - the only qualification for membership is an interest in rural life. YFCU has over 3,000 members aged 12- 30 years old. There are currently 58 active clubs in Northern Ireland.

## Agricultural education, advice and skills

### College of Agriculture, Food & Rural Enterprise (CAFRE)

The College of Agriculture, Food and Rural Enterprise (CAFRE) offers full-time and part-time courses to educate new entrants and support staff working within the agri-food and rural sectors to improve business efficiency.

### LANTRA

Lantra are a training organisation who develop training and qualifications in a wide range of areas from forestry and horticulture, to agriculture and landscape, and much more. Their courses are developed by industry experts who know the sector inside out.

### NI Dairy Council

From the farm to the fridge, the Dairy Council for Northern Ireland acts on behalf of the dairy industry, promoting the natural goodness and quality of Northern Ireland milk and dairy products. Their primary function is to communicate factual information to allow individuals to make well informed choices about dairy products that they consume and to inform them of the benefits of including dairy products in a balanced diet.

### Queen's University, Belfast

Founded in 1845 as Queen's College Belfast, became an independent university in 1908. Today, it is ranked 43 in the world (Times Higher Education Impact Rankings 2021), and a member of the Russell Group of UK research intensive universities, combining excellence in research and education with a student-centred ethos.



### **Ulster University**

Ulster University has a national and international reputation for excellence, innovation and regional engagement, making a major contribution to the economic, social and cultural development of Northern Ireland. Their core business activities are teaching and learning, widening access to education, research and innovation and technology and knowledge transfer.

### **Business support and development**

#### **Business Partnership Alliance - Armagh City, Banbridge and Craigavon**

The Business Partnership Alliance has been established to support local businesses in the region and have recently launched their Recovery Manifesto and Action Plan 2021, recognising the opportunities for development and growth within the Agri Food sector.

#### **FoodNI**

Food NI provides a single promotional voice for Northern Ireland's food and drink. They work to enhance the reputation of Northern Ireland's food and drink through the Taste of Ulster and their Food So Good messages.

#### **Health & Safety Executive Northern Ireland**

The Health and Safety Executive for Northern Ireland (HSENI) is an executive non-departmental public body sponsored by the Department for the Economy (DfE). It is responsible for the promotion and enforcement of health and safety at work standards in Northern Ireland.

#### **InvestNI**

Invest NI is a regional economic development agency providing a range of business support and grants. InvestNI registered businesses can visit the Business Information Centre at InvestNI to view the market research and company information databases or request information.

#### **NI Business INFO**

NI Business info is a free service offered by Invest Northern Ireland, it is the official online channel for business advice and guidance in Northern Ireland. It contains essential information, support and services for businesses, from start ups to large businesses.

#### **Northern Ireland Food and Drink Association (NIFDA)**

NIFDA partners with existing providers, associations, government and companies to assist in promoting the competitiveness of the industry. They aim to promote 'One Voice' across the industry on matters including export, strategy, regulation, technology, marketing and Research & development.

### **Cross Border economic support**

#### **East Border Region (EBR)**

East Border Region Ltd is a Local Authority led organisation which comprises six Local Authorities namely; Newry, Mourne and Down District Council, Armagh City, Banbridge and Craigavon Borough Council, and Ards and North Down Borough Council in Northern Ireland and Louth, Monaghan and Meath County Councils in the Republic Of Ireland. The aim of the organisation is "To work with stakeholders throughout the East Border Region to ensure balanced and sustainable development on a cross border basis"

### **Irish Central Border Area Network (ICBAN)**

ICBAN was founded to promote cross-border co-operation and communication at a Local Government level on common regional development concerns. This provided a forum to respond to the unique economic and social needs of the Central Border Region.

The eight member Councils areas of the Central Border Region includes Armagh City, Banbridge and Craigavon; Fermanagh and Omagh; Mid Ulster and the counties of Cavan, Donegal, Leitrim, Monaghan and Sligo. Many of these areas share similar geographical, economic, social, administrative and political characteristics.

### **Mental health and wellbeing**

#### **Northern Ireland Rural Women's Network**

Northern Ireland Rural Women's Network (NIRWN) was established in September 2006 'to promote and support rural women in rural Northern Ireland. They are a membership based organisation with a mission 'To amplify and articulate the voice of rural women at local, regional and strategic level'.

#### **Princes Countryside Trust**

The Prince's Countryside Fund (PCF) is the only UK-wide charity that empowers family farms and rural communities to survive and thrive. The PCF delivers programmes for the farm, the rural community and local support such as Farm Resilience Programme and Supporting Rural Communities Programme.

#### **Rural Support**

Rural Support was formed as a charity in 2002. The organisation provides this support through a helpline which offers a listening and signposting service for farmers and farm families. Callers to the helpline are of all ages and backgrounds and come from every part of Northern Ireland. The types of issues that they address include financial and debt problems, inheritance issues, physical and mental health concerns, farming paperwork and bureaucracy.

#### **Southern Health & Social Care Trust**

The Southern Health and Social Care Trust provides health and social care services across the two Council areas of Armagh City, Banbridge and Craigavon Borough Council and Newry, Mourne and Down District Council. The Trust delivers services from a number of hospitals, community-based settings and in some cases directly in individuals' homes.

#### **TADA**

TADA is one of seven providers with a contract from DAERA to provide local community development support and advice service. There is a need to support community development in rural areas and DAERA has supported this through current funding of rural community development through its Tackling Rural Poverty and Social Isolation Framework. TADA's Mission is to help sustain vibrant local communities in rural areas through the development and support of all rural community groups and individuals by providing information, advocacy, capacity building and partnership working with all other relevant bodies. As previously discussed, agriculture and agri-food are very strong methods for spreading wealth across rural communities and there may be opportunities to facilitate better engagement between TADA and the farming community.

#### **Yellow Wellies**

Yellow Wellies are a Farm Safety Foundation, an award-winning charity and are dedicated to support the physical and mental wellbeing of the UK's farmers. Farming remains one of the country's most hazardous industries; accounting for 1% of workers but 20% of all worker fatalities (HSE).

## Nature and conservation development initiatives

### Animal Health and Welfare Northern Ireland

Animal Health and Welfare NI (AHWNI) was formally launched in 2012. It is an industry-led, not-for-profit partnership between livestock producers, processors, animal health advisers and government. It is overseen by a board of directors. Its remit covers diseases and conditions of cattle which are endemic in Northern Ireland, but which are not currently subject to regulation or coordinated programmes of control.

### Nature Friendly Farming Network

The Nature Friendly Farming Network is led by farmers across the UK with a passion for sustainable farming and nature. They seek to unite farmers across the UK who have a sustainable outlook and want to secure positive changes in policy, including how farming is supported by the public.

### Pesticide Voluntary Initiative

The Voluntary Initiative is an industry led programme. Through its schemes, tools and messages they promote the responsible use of pesticides through an IPM-based approach to sustainable agriculture.

Their mission is to be the UK's primary delivery mechanism for promoting best practice in pesticide use through enhanced adoption of Integrated Pest Management (IPM) as defined by the Sustainable Use Directive in order to protect water and the environment.

### Royal Society for the Protection of Birds (RSPB)

The Royal Society for the Protection of Birds (RSPB) is a charitable organisation which was founded in 1889. It works to promote conservation and protection of birds and the wider environment through public awareness campaigns, petitions and through the operation of nature reserves throughout the United Kingdom.

## Other influencing factors

### Consumer Trends

Consumers are becoming more cultured in their choice of product, influenced by lifestyle choices, dietary requirements, or beliefs. The market is evolving with many 'free from', convenience products and lifestyle products. The industry has a challenge to evolve and develop food solutions in response to trends in the coming years.

### Farm Safety

More people are killed and injured in Agriculture than any other industry in the UK and Ireland. HSENI report<sup>12</sup> that there are 12 fatalities each year although it is generally recognised that there is a significant degree of under-reporting of incidents in other categories.

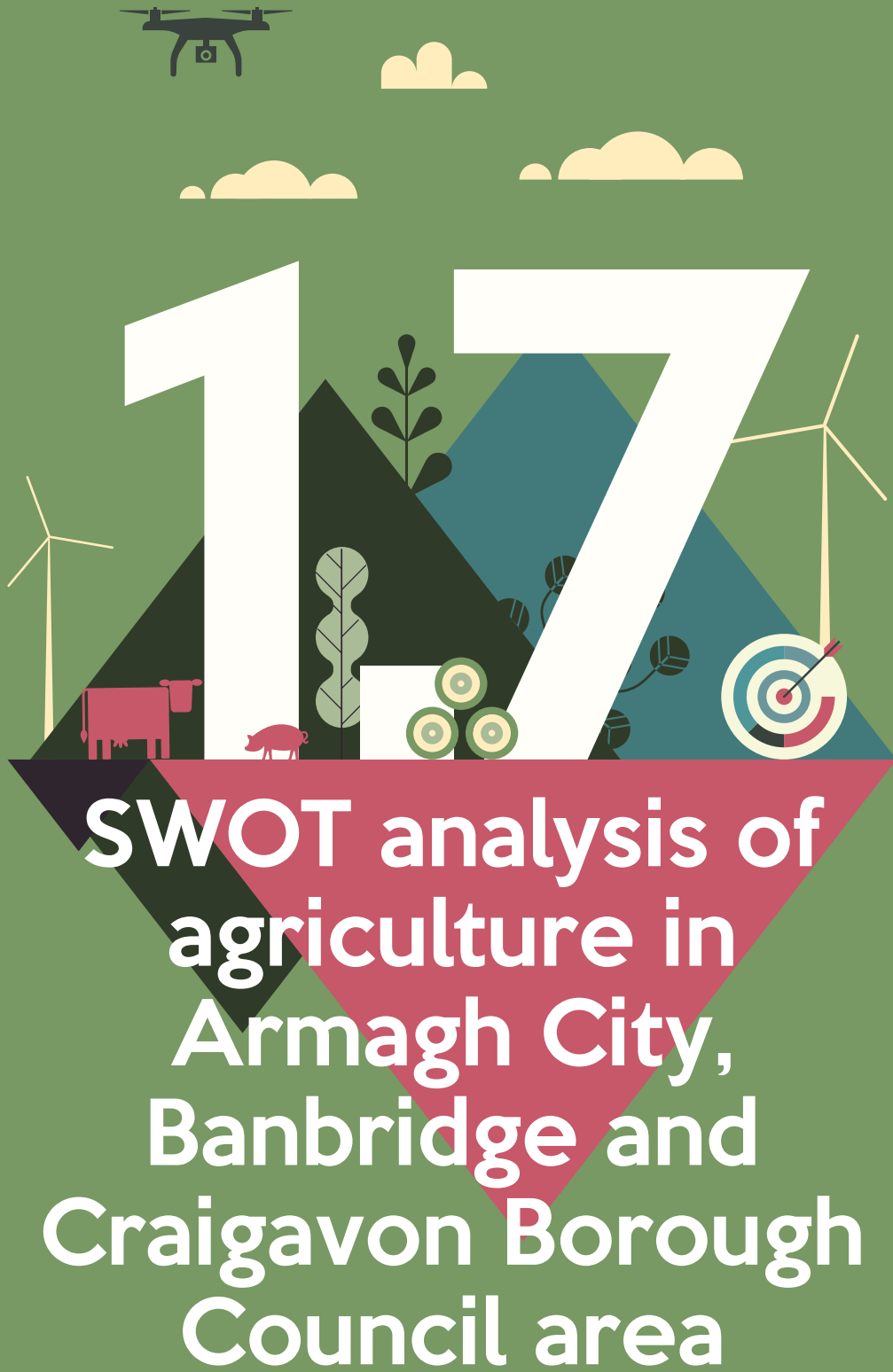
The Farm Safety Partnership NI, a group of stakeholders, aims to increase awareness of farm safety and to reduce work-related fatalities and injuries on Northern Ireland's farms. A Farm Safety Action Plan covers the period from April 2020 to March 2023.

### Rural Crime

In regards to burglary, robbery and theft offences, 35 occurred within the borough, which is down from 56 in previous 12 months. Within the borough, there is already a Farm Watch Initiative in place which is described earlier in this document.

Armagh City, Banbridge and Craigavon PCSP in conjunction with PSNI have developed a Text Alert system which will allow PCSP to communicate directly with citizens/farmers of Armagh City, Banbridge and Craigavon Borough Council who sign up for the scheme by SMS text message almost immediately if there is an issue in their area. From the Farmers survey, when asked "How much confidence do you have in the PSNI to prevent/detect rural crime?" 54% of respondents were not confident, with only 5% stating they were confident. 83% said they had crime prevention measurements in place which included trailer/property marking and CCTV.

12 Health & Safety Executive Northern Ireland Press Release, 18th July 2019





# 1.7 SWOT analysis of agriculture in Armagh City, Banbridge and Craigavon Borough Council area

Following the gathering of information and the extensive discussions with farmers and stakeholders in the region, a summary of each of the challenging areas and opportunity areas was made for the agricultural production sector.

## SWOT analysis: agriculture

### STRENGTHS

- 3,431 active farms contributing over £376 million to the local economy.
- 63% from the Farmers Survey are already taking steps to improve the environment with the highest being increasing hedge height.
- 76% from the Farmers Survey are already conducting soil testing.
- A range of farmers in the area are in influential positions, enabling the challenges around agriculture to be recognised.
- Central location enabling farmers to easily reach knowledge transfer events.
- Centrally located, with easy access to raw materials across NI.
- Council already has structures which could be useful to the agricultural community - particularly Food Heartland, and Tannaghmore Rare Breeds Animal Farm.
- Farmers are very adaptable and entrepreneurial when they visualise an opportunity and have the skills to deliver it.
- Good transport linkages across most of the borough to markets for farms, manufacturers and artisan producers.
- Land types are better than NI average.
- Strong food heritage and range of food production.

### WEAKNESSES

- A lack of understanding of the benefits of farm business data systems.
- A lack of understanding of the potential effect of very advanced technology in the medium to long term.
- Although it is improving, many farmers do not really look after their own physical or mental health.
- Broadband connectivity is poor across parts of the borough.
- Carbon Net Zero has not been effectively explained to the farming community, therefore it is seen as a threat
- Farm Business IDs are not being recognised by council and other stakeholders as requiring business support. Farms have not been eligible for business support programmes and farmers have missed out on developing business skills.

- Farming is not treated as a business by some farmers leading to an unviable business unit.
- Farming tends to be considered as one entity, whereas it usually has multiple enterprises.
- Low level of knowledge about practices which can protect and enhance the environment.
- Low levels of joint working, machinery sharing etc. among farmers.
- Many farmers see themselves as production-only focused, meaning that producing public goods is seen as a distraction and not as important as food production.
- The farm accident rate is much too high, making it one of the most dangerous sectors in the UK and Ireland.
- Uptake of technology and new practice is low across many farm enterprises.
- Very low level of data collection amongst cattle and sheep farmers, and also some dairy farmers. Effective use of data is not widespread.

### OPPORTUNITIES

- A coordinated structure involving stakeholders such as CAFRE, AFBI, UFU, Rural Support and AgriSearch providing knowledge transfer as ongoing support to farmers.
- A growing demand for farmers to provide independent assurance of their environmental credentials.
- All sectors could benefit from being introduced to the latest technology and practice, an opportunity exists for council to do this through development of visits to demonstration farms, webinars and by developing an ABC Agriculture Network.
- Considerable potential benefit around the creation of food stories to promote the sector as a whole and food tourism in particular.
- Grow the Food Heartland reach and offering to include farmers and agribusinesses (non-food).
- Implementation of automation and robotisation on many farms to carry out repetitive tasks would improve labour productivity and free up time for business planning and development.
- Improvement of rural broadband, service and electricity network should be high priority to drive innovation and improved services for the industry.
- Increased collaboration between the planning department and the agriculture industry will support preparation for the new wave of agricultural innovation and enterprises predicted to emerge in the next decade. This may include using new technology and practices to for carbon zero impacts and improving productivity.
- New familiarity with video conferencing provides opportunity for knowledge exchange and training.
- The collection, understanding, interpretation and proper use of data would benefit farm productivity and environmental performance.
- The development of a short, environmentally friendly, local supply chain alongside food processors and businesses in the area.
- The development of much closer communication links with the farming community allowing the council to become better connected.
- The uptake of precision farming techniques which use GPS geolocation can unlock high environmental performance.

### THREATS

- Common Agricultural Policy (CAP) reform is the biggest threat to the cattle and sheep sectors, with the majority of those units being unviable without subsidy.
- Emerging environmental legislation will restrict farm enterprises unless environmental improvements can be made.
- Evolving planning regulations could further complicate the process and restrict development.
- Lack of engagement between farmers and council in recent times.
- Reducing producer margins in many enterprises mean that it is likely that some units will exit the industry once CAP reform is complete.
- Rise of alternative diets and allergen awareness.
- Rising energy costs and bills.
- The environmental impacts of slurry (on air, soil and water) are the biggest threats to the intensive (pig, poultry and dairy) sectors and could require reduced enterprise sizes.
- There is the potential that, if carbon trading launches commercially, many farms could sell their credits outside the industry, meaning that the industry is not credited with the progress it makes.

### SWOT analysis: agri-food and agribusiness

#### STRENGTHS

- A large number of agri-food businesses operate within the borough.
- Businesses are centrally positioned, giving access to raw materials from across NI.
- Food Heartland in place since 2015, which provides a base for supporting the agri-food sector.
- Good relationship with the council.
- Local food businesses win Great Taste Awards and Blas na hÉireann Awards.
- The importance and potential of food and agri-food is recognised in the borough.
- There has been a growth in turnover over the last 5 years<sup>13</sup>.
- There has been difficulty supplying products from GB in NI and Ireland meaning that businesses in NI have the opportunity to gain more business locally from key retailers.
- Willingness within the council to create conditions which encourage development.

#### WEAKNESSES

- Further need for industry promotion through initiatives such as Food Heartland and SOAR.
- Lack of proper data management, and low awareness of how to use data and how it could drive productivity.
- Limited understanding of new updates and changes to food safety and legislation.
- Little focus on the use of technology/advanced technology in businesses in the borough.
- Local colleges have nowhere to refer food businesses to for development.
- Loss of labour due to European migrant workers returning home, leading to labour shortages and failure to supply key customers.
- Loughry Food Business Incubation Centre is at full capacity, and its units are generally too large for small businesses.
- Low awareness of the technical support which is available.
- No availability for food incubation/development units or spaces in the borough or MSW Region.
- There are some suggestions that innovation in food businesses is not as strong as it could be. However, some businesses are highly innovative and should be recognised.

#### OPPORTUNITIES

- Capital investment intervention opportunities to support agri-tech/food as part of the MSW Regional Growth Deal
- Collection and use of data for management.
- Delivery or facilitation, identifying potential ideas and support for businesses and making them easier to access including marketing, social media e-commerce and digital training.
- Development of agri-food tourism. The creation of stories, trails, and an effective food network will all increase visitor traffic and spend.
- Education and advice in food safety and legislation e.g. food allergens, labelling, hygiene and Hazard Analysis and Critical Control Point (HACCAP).

13 Northern Ireland Statistics and Research Agency (NISRA) 'Northern Ireland Food and Drinks Processing Report 2019'






- Education for the consumer to understand where food comes from, cooking skills etc.
- Further collaboration between council, DAERA, Tourism NI and Tourism Ireland to ascertain the potential of agri tourism in rural areas in a sustainable way.
- Good partnerships with Food NI and NIFDA (NI Food and Drink Association).
- Implementation of automation and robotisation within food processing factories is critical to address the labour challenge and improve labour productivity.
- Improved engagement between council and agribusinesses across a range of business topics.
- Opportunities beyond traditional food production to non-animal sourced protein in particular.
- Opportunity to strengthen the link between local agriculture and local food businesses.
- Provision of advanced robotics, data gathering technology, drone technology.
- Support for diversification planning.
- The development of a short, environmentally friendly, local supply chain alongside agriculture businesses.
- To serve an emerging focus on healthy diets and food education with linkage to the importance of mental health and wellbeing.
- Training updates on new consumer trends and new emerging products.

**THREATS**


- A reduction in farm income is likely to reduce farm spend at supporting businesses, reducing profitability in these sectors.
- A rising minimum wage, reducing competitiveness as businesses in NI are less automated and more dependent on a plentiful supply of inexpensive labour.
- External pressures may force a reduction in farm numbers, which could affect availability of raw material to support food processing premises.
- Fluctuating economic environment causing reduction in availability of manual workers and creating real issues for businesses.
- Not all businesses are prepared for the environmental pressures which will be applied in the next decade.
- Rise of alternative diets and allergen awareness.
- Rising energy costs and bills.
- There is a gap in support for small and medium-sized enterprises (SME) who are pre Invest NI ready but who need investment, this holds back the development of the sector.



SECTION 2

# Addressing agriculture's challenges and opportunities in the Armagh City, Banbridge and Craigavon Borough Council area





“AI in Agriculture will be rebranded to Autonomous Intelligence to reflect the robotization of the industry using hardware such as tractors, combines, grain trucks, etc. The hardware is networked together with sophisticated software to increase scale and efficiency to meet today’s advanced technological demands generated by urban centres worldwide.”

Darcy Pawlik, VP Global Agriculture at Understory, Inc.



Challenges, causes  
and solutions  
in agriculture

# 2.1 Challenges, causes and solutions in agriculture

It is clear from research that the agricultural industry is at a time of change. The UK exit from Europe, the re-evaluation of farm support, the growing environmental challenge and the rapidly emerging opportunities from automation mean that we are on the cusp of the most radical changes in agriculture since the 1930's when widespread mechanisation took place.

While change is uncomfortable at times, it also brings tremendous opportunities for those who are most prepared. The role of the council is to do what it can, in conjunction with other stakeholders, to make it as easy as possible for its agriculture and agri-food businesses to adapt.

During the course of the data gathering phase, and especially during the workshops with Armagh City, Banbridge and Craigavon Borough Council Elected Members, officers and two public surveys, several challenges in the sector were identified by multiple participants. The following paragraphs outline the main ones, but it should be noted that not all challenges apply to all sectors.

## 2.1.1 Challenge Areas

The challenge areas which have been identified below can be split into a number of categories and are related to the eight themes outlined earlier in this document. Challenge areas include; those which can be impacted/changed by the farm manager, those which can be influenced by the Council, those which are completely external impacted by policy or law which can only be reacted to, those which require investment, those which require skills training and those which require attitudinal change etc.

In the themes below a series of challenges are presented and explained. Each challenge is followed by a solution which are then amalgamated, discussed and explained in more detail in the enablers section.

## Theme 1: The impact of changing farm support structures

### BREXIT:

**Challenge:** Overwhelmingly, the issue of Brexit was mentioned in almost every workshop. Even now, months after leaving the European Union, it is hard to determine the full impact Brexit has had on the agriculture industry.

**Solution:** The council has limited impact on this challenge and can continue to signpost businesses for advice and information. They may also highlight challenges and lobby for changes.

## Theme 2: The need for sustainable farming and business

### LAND CONDITION:

**Challenge:** The conacre system creates problems around land condition. The lack of security for those renting the land means that little development is put into soil quality, resulting in reduced grassland or crop performance. The conacre system needs to be altered through the use of tax incentives for long-term letting of land. Recent survey work carried out by Birnie Consultancy shows that farmers are only really willing to invest in the development of land if they know they have it guaranteed for at least a further 5 years.

**Solution:** This is not within the remit of the council to address. It requires change by HMRC. ABC Council could lobby for change.

### HIGH NUTRIENT LOADING OF LAND:

**Challenge:** Similarly to the rest of Northern Ireland, nutrient loading of land is a concern across the ABC Council area. The primary cause of this is partially the application of artificial fertiliser, but increasingly the challenge is around the application of slurries and farm manures, particularly from intensive pig and poultry units.

**Solution:** Council should investigate the viability of one or more slurry handling hubs for the area with nutrient stripping capacity. Collaboration with stakeholders to increase nutrient education within the borough is key.

### FARM STRUCTURE:

**Challenge:** Farm structure is a key consideration. Across ABC the size of farms varies widely with 76% very small, 11% small, 5% medium and 8% large. Many of these farms perform well but the limited size means that they are unable to support a full-time employee. Some of these farms are operated as lifestyle farms, meaning that profit is less relevant, but other farms need to be profitable to make a living, but are not. The historical nature of farming has meant that the numbers of farmers continually reduce as the technical ability of farmers raises, meaning that one person can manage an increasing amount of land.

**Solution:** There is very little which ABC Council can do about farm structure. It is important to recognise that average farm size may remain small and to ensure that structures are in place to enable diversification wherever possible with all farms having the same opportunities. Council and stakeholders must begin to recognise a farm as an eligible business requiring support.

### THE ENVIRONMENTAL CHALLENGE:

**Challenge:** Northern Ireland as a whole does not currently have strong environmental performance. There are currently no commercial methods of measuring biodiversity on farm, soil health and its capacity or ability to support the environment is unknown. This is primarily because of the lack of instrumentation of the landscape. Measures which ideally should be known include; soil pH, soil organic matter content, soil phosphorus nitrogen content, micro-nutrient content of soil, bio-diversity, air quality, water quality, carbon production and carbon sequestration. Compounding this, there is a lack of widespread awareness of methods by which environmental concerns could be alleviated.

**Solution:** Upcoming changes in environmental legislation will change this in the years to come. Council could have an effective role in preparing local farmers for these changes through training, support and demonstrating the different techniques at Tannaghmore Farm alongside activities within Food Heartland/SOAR and potentially on other commercial demonstration farms. Meeting the challenge also opens opportunity for both 'carbon' and 'energy' farming practices, which will take farm businesses away from the traditional crop and livestock production methods.

## Theme 3: The need for culture change in farming

### DATA COLLECTION ON BOTH FARM PERFORMANCE AND ENVIRONMENTAL PERFORMANCE AND ITS USE FOR MANAGEMENT:

**Challenge:** Poultry and pig farms are relatively data rich, data driven and make good use of their data analysis. An examination of the growth in performance in these enterprises shows the benefit of a data driven focus on long-term physical performance. Most dairy and arable farms have good data collection capability, as does horticulture and mushroom farming. However dairy farms and crop production farms tend not to make good use of the information collected. Cattle and sheep farms collect limited data other than typical APHIS requirements. The more extensive production systems are associated with a very low level of performance measurement and data collection.

**Solution:** Through the provision of training courses and farmer-to-farmer knowledge exchange organised by an ABC agriculture network local farmers could be encouraged to take up better 'measure and manage' practices as they will be able to directly see the benefits to their farming enterprise.



**LACK OF COMPARISON TO OTHER FARM BUSINESSES:**

**Challenge:** CAFRE offers benchmarking services for farms in Northern Ireland, through their Business Development Groups across the farming enterprises, however the uptake is relatively low. In total, approximately 3,500 farms in total benchmark and have involvement in the business development groups out of a total of approximately 25,000 farms equating to approx. 1.4% of farms in NI. There are no specific figures for ABC farms which are involved in benchmarking. In the Farmers Survey, 60% of the farmers indicated they were not part of a BDG.

**Solution:** It would be beneficial if the council could find a way of incentivising farmers to undertake benchmarking, perhaps through a partnership between the Food Heartland, CAFRE, UFU and Rural Support.

**LACK OF BUSINESS APPROACH TO FARM MANAGEMENT:**

**Challenge:** Similar to the rest of Northern Ireland, many farms are not run as businesses, and lack management performance, a structured development plan and a long term focus. Technical skills in farming are often high, but business skills are much lower. The lack of recognition of farms as eligible businesses for business support programmes, particularly with Councils, InvestNI, has hindered business growth and business management on farms. DAERA tranches have been mostly equipment based grants and should now look to business support.

**Solution:** The provision of business skills through a training/advice hub, council led business support and engagement with funders and stakeholders to recognise and include Farm Business ID holders as businesses that require support.

Collaboration with stakeholders to promote current business support on offer in the borough, in effort to increase participation from farms in the area.

**LACK OF UPTAKE OF SCIENTIFIC FINDINGS AND NEW PRACTICE:**

**Challenge:** There are many incidences where a new technology or practice has been developed, however farmers have not taken this up because they are unaware of it or unsure how the effective this would be on their own farm.

**Solution:** Knowledge transfer is critical, as is a willingness amongst the farming community to try new things. Council's response should be to facilitate the involvement of other organisations to share knowledge, educate and enable advanced farmers to share their experiences and encourage uptake from others.

**A POOR CULTURE IN PARTS OF AGRICULTURE:**

**Challenge:** The Northern Ireland farming sector often recognises or rewards wrong indicators of success in farming. Often a large farm or the presence of the latest machinery is an indicator of success, and consequently many strive to achieve this. However, it is very clear that the best farms are heavily focused on data collection, data analysis, comparison against other similar farms and on managing against the findings of the data and the comparisons. Cultural change is required, and this is likely to take a long period of time.

**Solution:** Through the evolved Food Heartland Awards the introduction of specific awards for categories such as data collection and farm management can help drive the achievement of targets which truly identify the best farms. Council could help to change the culture through joint educational programmes and with support from Agriculture Champions.

**HIGH FARM ACCIDENT RATES:**

**Challenge:** Farms safety is a major concern across Northern Ireland. The attitude to farm safety is improving, however the nature of farming still presents multiple opportunities for dangerous working practices on-farm and many people are unnecessarily getting injured. Communicating a farm safety message is a challenge.

**Solution:** It is important to continue raising awareness of farm safety; including safety in all business training, constant messaging, provision of best practice information and videos. Joint working with farm and business safety organisations to maximise effectiveness is vital.

**THE CHALLENGE TO MENTAL HEALTH AND WELLBEING:**

**Challenge:** It is now widely recognised that there is a very large mental health challenge in farming. In 2018 the Department of Health stated that 24.4% of suicides were from farms, outlining many relevant findings in the 'Protect Life 2' Strategy. There are a number of reasons for this, including increasing financial pressures, increasing skills demands, isolation caused by the reduced joint working between farms and the reducing amount of employed labour on-farm. Although it is changing, cultural taboos still exist in the farming industry around admitting to mental health challenges or depression. The mental health challenge manifests itself in a number of ways including family breakdown, domestic violence and suicide.

**Solution:** A method of encouraging culture change around the perception of mental health challenges is necessary, as well as raising awareness of the importance of the uptake of mental health support services. The provision of discreet methods of accessing mental health provision will encourage raised uptake of these services, perhaps in conjunction with business advice. All business advice should consider personal development as part of its goals.

There is an opportunity for council and Food Heartland to raise awareness of physical and mental health by engaging with Southern Area Health Trust and Rural Support. Internal engagement with departments such as Community Planning and Community Development Health Improvement Teams. Council should look to other well-being initiatives and best practices such as social farming, equine therapy, and forest schools.

**Theme 4: Enablers and tools**

**UNDERSTANDING OF THE POTENTIAL EFFECT OF NEW TECHNOLOGY AND PRACTICE:**

**Challenge:** The introduction of new technology and practice to farming is challenging, and agriculture is at a technological crossroads. As new technologies and practices often appears intimidating, it often discourages farmers uptake when the implementation and management procedure is not explained correctly. This is also true for many agri businesses, who wish to digitize their operation but do not have the knowledge or confidence to implement.

**Solution:** The presence of demonstration farms which test and implement new practice and transfer the knowledge is essential. There is the opportunity for the council to get involved in creating or supporting demonstration farms in conjunction with other organisations, including AgriSearch, AFBI and potentially CAFRE. Council have opportunity to host agri networking and demonstration events to support agri businesses, encouraging the engagement between suppliers and customers.

**LOW PRODUCTIVITY:**

**Challenge:** The poultry and pork sectors are fully data driven and are internationally competitive. This is also true for a proportion of dairy farms and crop producers. Beef and lamb productivity is, on average, much lower and this presents a significant threat to the future viability of over half of these units. International comparisons reveal that Total Factor Productivity of UK farms is below the key international competition.

**Solution:** Providing education and training to increase productivity including efficiencies, new technology and data management. Along with the provision of peer mentoring from CAFRE, Rural Support, UFU and Food Heartland programmes. Introduction of a 'Most improved Farm Productivity' Award at the Food Heartland Awards would widen applications from farmers.

**INADEQUATE SKILL LEVELS FOR THE FUTURE FARMING SECTOR:**

**Challenge:** There are identifiable skills gaps around business management; data collection and use; and implementation, use and maintenance of technology. Farmers will often invest in structures and equipment but would be more reluctant to attend training. This will be a key part of being an effective farmer in the future.

**Solutions:** Encouraging other funders and stakeholders to be inclusive of Farm Business ID holders as eligible businesses will support training and development. This will open up linkages with other organisations providing skills training in Northern Ireland and facilitating access to this training.

**POOR RURAL BROADBAND:**

**Challenge:** The upcoming changes in agriculture will require large data flow to and from farms. According to rural broadband figures outlined in the statistical review 2019, only 66% of Northern Ireland has superfast broadband. At present, data flow to many farms is severely constricted and this must change. There is a clear link between connectivity and opportunity. Good rural broadband allows access to high value global jobs which would previously been inaccessible due to the need to relocate. Many of these jobs are highly skilled and have flexible hours which can work well around small farming units.

**Solution:** Connectivity is essential and hard-line broadband connections are preferred, Council should lobby for better mobile phone signal in blackspots, with the extension of 4G coverage and an upgrade to 5G where possible. These speeds would allow for fast data flow across the borough.

**FOOD INCUBATION HUBS:**

**Challenge:** Having the correct space to develop a food business can be a challenge, with 30% of respondents noting a difficulty in finding the correct food grade units, with 44 of those whom it was applicable to stating a need for small food grade production units for early-stage businesses in the borough. Food Incubation supports the transformation of innovative concepts through product development to commercialisation, there is also an opportunity for the tenants/users to network and share knowledge. Incubation units are important to support new business start-ups and business growth in the borough.

**Solution:** The Council, along with its Mid South West partners should investigate further the development of food incubation hubs with services such as technical assistance, in order to support agri food business growth and development.

**Theme 5: Labour and automation**

**SKILLS SHORTAGES IN AGRI BUSINESSES:**

**Challenge:** Agri businesses are finding it difficult to recruit and retain people with the correct skillset and experiences, including vets and logistics.

**Solution:** The Council should investigate holding recruitment days and events held in conjunction with education providers to promote training and employment opportunities within the borough, along with providing interview and CV preparation.

**Theme 6: Development and diversification**

**REDUCING PROFITABILITY LEVELS ON MANY FARMS:**

**Challenge:** Profitability differs substantially amongst farming enterprises, but the extensive sectors in particular perform poorly. Evidence presented earlier in this report shows that the cattle and sheep sectors in ABC Council area are loss-making without direct farm payments.

**Solution:** There is no single solution to the profitability challenge, however facilitating knowledge transfer, data collection, data analysis and business diversification are some steps that could enable farm and agri businesses to effectively adjust and improve. Business mentoring and education is essential.

**IDEAS AROUND DIVERSIFICATION, ACCOMPANIED BY A LACK OF ENTREPRENEURSHIP:**

**Challenge:** Financial pressures on cattle and sheep farming are increasing and the removal of direct farm support is going to drive the need for other off-farm income. Some farms may exit the industry, but others will wish to remain. Farmers have excellent experience, knowledge and understanding of livestock, however the levels of business skills would be lower than other industries. This mitigates against successful diversification and entrepreneurship.

**Solution:** The Council could address this challenge through targeted, high quality training, business skills, business planning and diversification support through their Economic Development Department, Food Heartland and SOAR. There is an opportunity to engage and raise awareness of Rural Support business mentors, DAERA Business Development Groups (BDG), CAFRE and UFU advisors.

**LACK OF ENTREPRENEURSHIP:**

**Challenge:** Farming is a traditional industry and is often focused on conserving what already exists rather than developing and going forward. The industry tends to be resistant to change or reluctant to change without available funding programmes.

Farmers can be reluctant to try new things, and DAERA's tranche funding schemes have often been mostly new equipment based, leaving little room for new growth and diversification. Farm Business ID holders have been deemed not eligible in entrepreneur and innovation programmes led by INVEST NI, Councils and Rural Development Programmes. Farms are businesses and should be supported to avail of assistance.

**Solution:** The Council could address this challenge through targeted training, education on emerging technologies, collection and use of data, business skills training and business planning support. There is an opportunity to engage with educational providers CAFRE, SRC, UFU, Rural Support business mentors and DAERA Business Development Groups (BDG). Invest NI and other funders should recognise that businesses within the agriculture industry have development and entrepreneurial potential.

**PLANNING ISSUES HINDERING BUSINESS DEVELOPMENT:**

**Challenge:** The low profitability of many farms, or their small size means that they are unable to support a full time worker, or to allow a successor to come into the business. This creates a need for on-farm diversification or the creation of potentially new/separate rural businesses to provide local jobs. There are significant challenges in obtaining planning permission in Northern Ireland for agricultural development, in areas where the critical loads and levels of protected sites, are currently exceeded. Agricultural applications and associated land spreading areas which are within 7.5 km of designated sites have the potential to negatively impact habitat and supporting species of designated sites due to the release of nitrogen emissions which either prevents or severely restrict expansion of livestock enterprises in these areas.

There also appears to be disengagement between the farming community and the planning department, with many farmers progressing development without permission, and / or a lack of an awareness on the permitted development around farm buildings or the challenges that may be faced in obtaining such permission, due to the aforementioned planning and environmental challenges.

**Solution:** A more joined up approach between agriculture and the planning department would be useful. Holding regular workshops may help farmers and other businesses to understand what is and is not permissible. These workshops would provide an insight for planning officers regarding future agricultural developments, allowing them to provide more effective advice and assistance to enable a more efficient process. Attendance at farmers meetings by planning officers may be useful if the meeting is focused on future development opportunities like new enterprises or diversifications on-farm.



## Theme 7: Partnership with the council

### PLANNING RESTRICTIONS WHICH HOLD EXPANSION OR DIVERSIFICATION BACK:

**Challenge:** Through discussions with the Planning Department and relevant stakeholders, it is clear that the planning application process and the associated policy constraints are not well understood by applicants, nor are the impacts of environmental legislation. This lack of understanding often results in lengthy processes, declined applications and undue costs for the applicant. It also became clear that the Planning Department would like to be briefed on the new and emerging technologies in the agriculture industry.

**Solution:** A regular planning surgery should be held with planning officers being made available to the agriculture industry to answer any questions and demystify the planning process. Along side this, targeted training should be given to planning officers to better prepare them for developments in the industry.

### UNDERSTANDING OF THE PRACTICES WHICH COULD BENEFIT ENVIRONMENTAL RESILIENCE:

**Challenge:** This is perhaps the biggest gap in current agriculture. There is little baseline information which can be used to identify environmental performance in localised regions or catchment areas. Compounding this, there is limited practical information about what farms can change to improve.

**Solution:** Council has an obligation to benefit the environment. There is a real importance to linking organisations with strong environmental knowledge to farms in the region, and it is also vital to provide instrumentation to measure the environmental performance of highly localised geographical areas and to monitor the progress which is being made.

### HAVING CLEAR, CONSISTENT LINES OF COMMUNICATION WITH STAKEHOLDERS:

**Challenge:** There is a gap in how council shares key information with farms and businesses in the borough in a clear, consistent way. Council also need a clear procedure for receiving information from stakeholders to help inform the council on its own challenges.

**Solution:** Council should develop a communications plan with the aim of being able to reach every farmer and agribusiness in the borough. Communication on various channels is important as building external relationships with stakeholders to co-ordinate and deliver key messages.

## 2.1.2 Enablers

### Implementation of technology

The effective implementation of technology will be fundamental to the development of physical and environmental performance of agriculture. We are on the cusp of the fourth industrial revolution and it is important that the industry takes advantage to drive performance. Those businesses which do not take advantage of the opportunities will be essentially the same as those which continued to use horses rather than tractors in the 1930s and 1940s.

Scientific research shows that the short term impact of technology is often over-estimated, but the long-term impacts are dramatically under-estimated. This fact has hindered the implementation of new technology and practice across the wider industry. The technology which will be required by the agriculture and agri-food sectors will be required to address the following topics:

- **LABOUR EFFICIENCY:** Labour efficiency will be driven through technologies which can enable individuals to work more quickly or which fully replace labour. This will not happen overnight, but will become more and more commonplace. Already, dairy robots are very common, as are labour saving devices in pigs and poultry. Drone technology can also save labour as well as reducing in-field compaction. Autonomous tractors and machinery is close to implementation, and the advent of super-fast broadband will be associated with the use of vision driven robots with a much wider range of function. It is worth noting that robotisation means that farming activities are no longer broadly restricted to the daytime and the potential to share equipment between farms rises as a result.

The day is not too far off when most harvesting activities and fieldwork will be carried out autonomously. Training may, in many cases, also be automated.

- **UNDERSTANDING THE LAND:** It is likely that LiDAR analysis will become commonplace on-farm, allowing measurement of above ground carbon capture and a clear understanding of water-flow across land. The understanding of water flow patterns will enable farmers to more accurately apply nutrients via fertiliser or slurry, while reducing run-off and improving water quality.
- **DRONE TECHNOLOGY:** Drones will be increasingly used across NI farms. There are many advantages to the technology, but perhaps the most useful for Northern Ireland is the ability to apply nutrients and monitor grassland/crop performance without causing land damage. The potential applications for the technology include; nutrient application, grass growth monitoring, crop growth monitoring, grass and crop health, biodiversity monitoring, pest monitoring, above ground carbon and measurement of water flow.
- **DATA COLLECTION:** The widespread use of sensors will raise data collection substantially across a wide range of components including soil pH, soil organic content, moisture levels, weather conditions, water quality, air quality - this is referred to as instrumentation of the landscape and it will become commonplace across the sector. It may even become a requirement to receive support payments. Camera technology, weigh cells, temperature scanners etc. will also transform the monitoring of livestock and crop performance. Farmers who implement this type of technology will have a constant real-time knowledge of what is happening on their farm. As an example, technology already exists to give early warning of disease in both livestock and crops. This early identification allows early treatment, reduces spread, lower use of medicines or pesticides and an overall economic improvement. The data collected must be used in conjunction with GPS equipment to minimise input while maximising output. Data collection and data usage is the fundamental component required to underpin progress in the sector. Some software systems can auto analyse this data to provide alerts and signpost advice.
- **ENERGY EFFICIENCY:** The reduction in use of energy will be more important for intensive enterprises, but ideally farms need to move to energy self-sufficiency, or at least energy neutrality. Solar panels on farms and farm buildings could help generate clean energy, reduce electric costs and will offer the opportunity to explore energy farming. The energy technology may include monitoring technology, generation technology and storage technology and will usually require infrastructure change on the farm. Resources and funding is required for farms to implement, there is an opportunity for stakeholders to introduce farm energy grants or green business grants.
- **MANAGEMENT OF ENVIRONMENTAL IMPACT:** In addition to environmental monitoring, technology will also be used to manage impact on the environment. Many intensive production units will make use of technology to clear the air, separate slurry, strip slurry of nutrients etc. before it leaves the farm. Technology will enable better reuse of what were previously by-products, reducing overall environmental cost of production. It is also likely that central bioeconomy units will be developed to manage slurry, Northern Ireland's single largest environmental challenge besides carbon production.
- **DATA MANAGEMENT SOFTWARE:** This is an extension of the data capture piece, but there will be automated and central analysis of farm data, with benchmarking if required. This could enable farms to identify areas for improvement and will transform farm performance which is likely to include the building of digital models of farms which can be used to digitally 'try-out' potential changes before they are invested in or implemented.

### An infrastructure which permits uptake of the latest technology

It is critical that farming has access to effective energy networks, including access to high specification two-way electric grids and fuels for heavy machinery (diesel, hydrogen, biomethane, electricity). It is also vitally important that rural areas have access to high-speed broadband as this will enable agri business formation and growth in remote areas, enabling implementation of the latest equipment and technology operation at the farm level. This will support the growing need for automation and precision farming. We note that Project Stratum is connecting 10,080 premises in the area to superfast broadband by winter 2023, but it is critical that this project continues at pace. Energy production and/or storage will be important for Northern Ireland farms.

### Cultural change among the farming community

The culture in farming remains that one just continues to “plough on” through difficulties that arise rather than seeking the best solution to the issue at hand. Farmers consider themselves to be self-reliant and rarely ask for help in all matters of business, development, health, and well-being for fear that this would be a failure or perhaps a lack of confidence to ask for such help.

Farmers can hold themselves back from excelling at what they do by just to “sticking to what they know” and there is fear to diversify or branch out due to lack of confidence or lack of knowledge. As an example, many in the industry view a good farmer who breeds award winning livestock, who has high spec machinery or who gets the top price at the mart. The truth is much more subtle. The best farmers share a number of characteristics and it is important that the industry recognises this and publicly recognises the real ‘good farmers’ who are custodians to the land, put their livestock before themselves and runs a farm business seven days a week.

The best farmers are data driven, they make long term plans for their farm, they benchmark, they have active nutrient management plans, active environmental plans, they undertake training and skills development, they are involved in discussion groups, they are open minded and curious, and they continually change.

Council has a role to play by engaging with key stakeholders to provide access to the necessary skills, training, knowledge and support for the agriculture industry in the borough to help farmers broaden their skills and understand change. Council can raise awareness of farm responsibilities and activities by educating the public about where food comes from and by heightening their appreciation for the agriculture industry.

### Skills training

As identified earlier in this report, farm businesses are poor at investing in personal or staff development. There are a number of reasons for this; 1. Rooted in the traditional dislike of education 2. The inability to see a financial return from training (does exist) 3. Time taken out of the working day to train 4. Course content is poor and takes too long to deliver its objectives therefore discouraging participants from participating in future training. 5. Training is much too formal.

There is an opportunity to tailor sessions to have a more relaxed discussion, practical format which may work better and the potential for farmers to train other farmers should also be considered. Post Covid now that farmers have become comfortable with online sessions as they save time travelling to and from events. Online sessions could be encouraged more to increase participation, as online fits better with a farmers working day, however there is more interaction with face to face sessions.

**Skills training in agriculture:** Northern Ireland farmers have good access to advice around technical skills. However, three clear training needs have emerged for the agricultural community;

1. **Business skills:** This need is primarily aimed at cattle and sheep farms, however other enterprises will benefit. Most farm managers in these enterprises have good technical skills around the actual physical farming process. However much fewer have the business skills necessary to develop their farm for the future. This is demonstrated by the many farms which broadly fail to collect, never mind use, management data. This has got to change, and it must start with persuading and demonstrating the value of data before moving on to how this value is unlocked. The training in this area would include a focus on:
  - How businesses use data for, planning, measuring progress and critical evaluation
  - How to compare and assess business performance
  - How to create and use an effective business plan
  - Sourcing and implementing ongoing advice around data
  - Why data is valuable, which data is valuable and how to collect it

2. **Technology skills:** Skills training around technology is applicable across all farming enterprises. The development of every enterprise will be underpinned by advanced technology and farms will need to prepare for this. Technology training will be required, and is likely to focus on:
  - Decision making around where technology can most benefit an enterprise
  - Obtaining ongoing support for use of technology on farm
  - Practical implementation and adoption of technology
  - Practical use of technology and how to maximise its effectiveness
  - Problem solving and maintenance
  - Understanding the cost benefit of different technologies
3. **Environmental skills:** The development of skills and understanding of on-farm environmental management is now essential across all farms in efforts to reduce carbon, but is particularly important for the intensive enterprises (pig, poultry, dairy). It is imperative that training in this area is delivered to develop understanding and knowledge of environmental measurements and to support the farm business to achieve targets under future payment schemes.
  - Biodiversity audits
  - Creating a whole farm carbon balance
  - Identifying strengths and weaknesses
  - Measuring on-farm environmental performance
  - Steps to improve environmental performance at farm level
  - Sustainability audits

**Skills training in agri and agri-food businesses:** The skills are different to those required in agriculture, although there is overlap. The following are the key training areas which have currently been identified, but it should be noted again that the Council’s role in this is primarily one of facilitation and collaboration with stakeholders to avoid duplication.

**Technical skills:** We have observed that many small businesses struggle to obtain support when trying to expand, or in trying to get products into a retailer. Much of this support is already available but is not accessed by business. In particular CAFRE and SRC Food Technology can provide much of this support, signposting producers and providing helpful advice around food safety or labelling, but sometimes businesses can be nervous about approaching these organisations for help. Environmental Health provides support with food business registration and food safety regulations. Training could involve:

1. **Business development**
  - Collecting and analysing business data
  - Environmental performance and management
  - Financial assistance/grant support
  - Food safety, allergen management and updates on food legislation.
  - Labelling
  - Packaging
  - Planning application workshops
  - Recruitment, retention and upskilling
  - Sales generation and customer retention
  - Scaling up a business and providing referrals to food development space/units



2. **Robotics and automation:** Robotics is vital for the future of agri food and will be required to address the labour drain. This has already been covered in detail earlier in the report. Any training around robotics and automation would include:
- Building a business case and identifying Cost:Benefit
  - Case studies which demonstrate the advantages for the industry and lessons learnt.
  - Implementation, operation and maintenance of advanced equipment
  - Peer to peer training and advice about practical implementation and management
3. **Marketing your product:** Many small businesses, particularly artisan business have low staff numbers, and do not have time to dedicate to social media and promotion (although some are really excellent). Digital skills training in this area would include:
- Design skills using free, accessible programmes such as Canva
  - E-commerce sales
  - Exporting a product
  - Smartphone photography and videography skills
  - Social media marketing
  - The benefits of networking
  - Website specifications and creation

### Equality of opportunity

As highlighted in the demographic section of this report, women are under-represented in the agriculture sector, although the situation is probably not as skewed as the official figures suggest, with only 10% of respondents to the survey suggesting that they see gender as a barrier into the industry. Many women are deeply involved in the farm, particularly in relation to business paperwork, record keeping, management and planning. Many of the most effective farms are essentially family partnerships eg husband and wife teams or father and son teams, but may not show officially through data. Nonetheless, there is work to do to ensure equality of opportunity. Many of the skills required for future agriculture will be much more focused on data management and operation of high-tech equipment, as well as more market focused planning. The level of physical work on a farm has changed with the introduction of new equipment and machinery and this has paved an entry for women; the physical work was a disincentive in previous decades. In time, there will be a more obvious involvement of women in farming particularly as business leads.

Taking inspiration from the 'Women in Farming and the Agricultural Sector: research report' produced by the Scottish Government, there are various ways to help to grow this representation

- Equality of opportunity needs to be addressed in farming organisations. A programme of measures is necessary and the following are recommended:
  - Establishment of a 'talent bank' of suitably qualified women for farming positions (identifying their skills and interests, offering training opportunities, and encouraging farming organisations to recruit from this pool when positions became available).
  - Identifying women mentors to support male and female apprentices
  - If women-only networks and activities are supported, this should be through mainstream farming organisations, and not as separate fringe events.
  - Practical, hands-on training programmes need to be developed and made accessible to women through flexible scheduling, childcare availability and on-line components.

- Succession planning is poor and families are reluctant to discuss it together. Access to professional advice on succession planning, as well as awareness raising and support, should be offered to all members of farm families.
- To increase farm safety, financial incentives, for farmers to purchase equipment appropriate for women and to encourage the use of childcare facilities, should be developed.
- Women should be supported to pursue a range of farm diversification opportunities, at a variety of scales.

This is a complex issue, and council should initially commence supporting this sector by setting up a panel to further investigate the issues, and how they can be effectively addressed in the borough through collaboration with industry stakeholders and the rural community.

### Effective communication with farmers and agribusinesses

Farmers are often difficult to reach and communicate with, but almost all have mobile phones and have the skills to receive text or WhatsApp notifications. Many also use email. Any work which the council wants to do around development of the agriculture sector will require the ability to communicate with almost all farmers and agri-businesses in the region.

It is recommended that communication is carried out primarily through text/WhatsApp, using social media and/or email. This communication should carry clear benefits on a regular basis and include funding opportunities, study trips, interest stories and specific information around training.

In order to do this effectively, it is vital that council develops a communication plan through both the Food Heartland, SOAR and Farm-watch. To ensure continued uptake of the service, all information shared must be useful to the farmers.

### Development of strong working relationships with partner organisations

As stated previously, council should not create separate structures to deliver advice, training or support. There is the opportunity for development and expansion under the umbrella of Food Heartland to be the central component of an ABC driving force to make advice and support easily accessible for farmers, agri-food, agri-tech and agribusinesses in the farming and agri community.

This will involve signposting of key stakeholders, support schemes, assistance with accessing the required resource, leveraging of other organisations to run events or training specifically for farmers and agribusinesses in the borough. Collaboration and good relations with a wide range of partners, both internal and external to the council is essential and many of which were identified earlier in the strategy in section 1.6.

- AFBI (inc research/pilot farms)
- Agri Food Quest Competence Centre
- AgriSearch (inc Beacon Farm Network)
- CAFRE
- Council - across departments eg. Planning, Environmental Health, SOAR, Food Heartland, Economic Development, Community Planning, Community Development, Tannaghmore Farm etc.
- DAERA
- Department for Infrastructure (Roads and Rivers)
- Enterprise Ireland
- Farm Safety Partnership
- Invest NI

- Northern Ireland Environment Agency (NIEA)
- Queen's University Belfast
- Royal Society for the Protection of Birds
- Rural Community Groups
- Rural Support
- Southern Regional College - Food Technology
- Trading standards
- Ulster Farmers Union
- Ulster University
- Utilities (including BT Openreach, NI Water Service, Northern Ireland Electricity, Virgin Media)
- Yellow wellies
- Young Farmers Clubs of Ulster

To a large extent, the degree of involvement with these organisations will be determined by the priority which is assigned to the different development requirements, and it will be up to the team to determine this.

The effectiveness of this engagement should not be determined simply by how many meetings were held or how many communications were sent out, but by outcomes such as the uptake of advice, successful completion of training, entrants into the Food Heartland Awards etc.. The setting of the correct targets and the appointment of highly qualified staff should result in the design of systems which work and which are continually adapted to better meet the needs of the industry.

This can only be done effectively if resources are allocated to engage with the correct partners and maintain ongoing good relations. This can be facilitated by the council providing a certain amount of match funding to enable events and training to take place within the borough.

The provision of a Centre of Excellence could also be highly beneficial with a focus on high proficiency, qualified staff a must.

#### Health, wellbeing and safety

As outlined previously, farmers generally prioritise other work over their own health, wellbeing and safety, with 79% of respondents to the Farmers Survey stating they had worked when feeling sick, 90% having worked when over tired and 38% taken a risk or shortcut to save time.

Council should engage with Rural Support and Southern Area Health Trust to raise awareness of health and wellbeing support and help lines available to the borough. Rural Support have ongoing programmes which are available across Northern Ireland. Council should engage internally across departments such as Community Development, Community Planning, Environmental Health, SOAR and PSCP to take a 'one council approach' in supporting the farming community.

In terms of safety, council through Food Heartland could support stakeholders such as Farm Safety Partnership by raising awareness of safety on farms and collaborative work with key campaigns such as 'Farm Safety Week', 'Think Safe' and 'Your Farms Greatest Asset'.





## 2.2 Recommendations

Supporting the agriculture industry into the future requires a careful plan, divided into short, medium and long term development needs. These development needs can be broken down into three categories, focusing on people or skills development, technology development or updating, and structural change. It is essential that council does not duplicate the structures, support and resources provided by other stakeholders. Council should complement and promote stakeholders' resource offering in the borough to increase their uptake, whilst providing its own specific support in collaboration with stakeholders to bridge the needs of the agriculture industry in the borough. Much of what is recommended is around facilitation and creation of opportunities for joint working and leveraging of other organisations.

There are many organisations which would be willing to work with the council in supporting and developing the primary agricultural sector. This could best be facilitated through an enhanced Food Heartland. With investment in well qualified and skilled staff, Food Heartland could have an outward facing role (towards agriculture and the agri-food sector) and an inward facing educational role towards decision makers within the council. This should be enhanced by the appointment of 'Agriculture Champions' from within the industry who will provide a strong voice and will also bring credibility to what will be delivered.

### Recommendation 1: Expand and evolve Food Heartland

To date, Food Heartland has focused solely on support for the many exceptional food producers within the borough.

It is proposed that the Food Heartland should grow to include the provision of additional full-time officers who have agriculture appropriate skillsets, who understand the challenges in the area and have the drive to provide and implement solutions within a cohesive team who work together to meet the objectives.

The Food Heartland evolution will also require the establishment of a broad stakeholder forum with the key bodies to have an understanding of the agriculture industry and should include representatives from DAERA, AFBI, UFU, Young Farmers Club (YFC), Rural Support, SRC, CAFRE, PSCP, tourism bodies and Southern Area Health Trust. This should be paired with a wider agri-engagement forum which can be used for engagement and regular communication with its members.

The evolution of the Food Heartland may include:

- Relaunch of the Food Heartland brand to include agriculture, including redesign of imagery and materials.
- Redevelopment of the Food Heartland framework to reflect the added priorities and responsibilities required to support the wider agriculture industry.
- Collaboration with colleges, businesses and stakeholders to help placement students and graduates find work in the agriculture industry.
- Collaboration with other food networks, environmental networks, agri-tech and food innovation centres/hubs across UK and Ireland to share best practise learning.
- Development and delivery of support programmes that are inclusive of Farm Business ID holders and agri-related businesses to include training delivery identified in Recommendation 3.
- Development of a marketing strategy/action plan to promote and raise awareness of Food Heartland to the rest of the region and beyond. Increasing the Food Heartland online and social media audience.
- Development of working relationships with key partners to multiply effectiveness.
- Engagement with education providers, schools and young farmers to instil and develop an understanding of agriculture and food at an early age.

- Renewal of the 'Food Heartland Awards' to include farming categories such as:
  - Best business change
  - Best environmental enhancement
  - Best innovation/technology adaptation
  - Best use of data
  - Biggest increase in productivity.
- Supporting and raising awareness of the health, safety and wellbeing amongst Food Heartland farmers and businesses.
- The creation of networking opportunities to strengthen bonds between farmers, growers and producers across all enterprises enabling opportunities for local produce to be showcased to local producers.
- The introduction of beekeepers to the farming community in the borough and identification of opportunities to introduce more pollinators into the countryside.
- The raising of awareness of Protected Geographical Indication (PGI) products in the borough.
- The sourcing of external funding opportunities to deliver programmes.

### Recommendation 2: Develop a method of communicating regularly and clearly with every agriculture and agri-food businesses in the borough

In order for council to develop and support the agriculture industry in the borough, a communication plan should be developed to improve engagement with the farming community and agriculture sector, including a series of planned events, workshops and focus groups. The communication plan should be structured to take into account key campaigns delivered by other stakeholders and should be formed in conjunction with other specialist organisations and departments.

The success of communication and engagement is dependent on attendance and engagement by farmers and agriculture/agri-food businesses. In the absence of a comprehensive data base to reach farmers in the borough this will be a challenge to overcome.

**It is recommended that council:**

- Considers the role of a digital and social media officer to support consistent messaging and communication.
- Collect contact details for all farm businesses in the borough and updates their agri-food business database subject to General Data Protection Regulation (GDPR).
- Develop a communication plan to publicise events, programmes which support the agriculture industry and raise awareness of both council and stakeholder initiatives.
- Develop regular channels of communication including texts, WhatsApp, email social media, email etc.

### Recommendation 3: Develop a plan to facilitate skills development in agriculture and agri-businesses

Changing practices in the farming industry will require new technology and practice. The line between farmer and analyst will become increasingly blurred and a traditional skillset will no longer be enough.

Council has the opportunity to support and collaborate with other stakeholders such as SRC, Rural Support, CAFRE, UFU and its Economic Development team to enable and encourage the uptake of skills training through the running of courses and development in areas such as business management, technology and data, environmental management, marketing skills, robotics operation and management, and health, wellbeing and safety. Delivery of knowledge exchange and demonstration or training events should be carried out in conjunction with specialist organisations.

Stakeholders have developed well structured programmes which council should continue to raise the awareness of and increase attendance from the borough. Council could look at regular facilitation and hosting of webinars, training events, demonstration days, short courses, seminars and farm visits, bringing highly specialist individuals and organisations to deliver focused information to farmers in the borough and reaching out to non-members and hard to reach farms. Education and training should be determined by gathering information on what is practically achievable on-farm at present and be linked to what the clear needs are.

It is recommended that the council, through Food Heartland and stakeholders, recognises the needs of the industry and develops a plan to support, promote and address education, training and information requirements within the borough. Council may provide its own specific support in collaboration with stakeholders to bridge the needs of the agriculture industry in the borough.

The advice, training and support delivered at these events should be holistic and include collaboration from relevant and qualified organisations for best results and impact and may include but not limited to:

- Benchmarking and using data to measure.
- Creation of a register of experts and delivery of clinics in their areas of expertise e.g. data collection, emerging technologies.
- Delivery of environmental management skills, new processes, implementation of nature based solutions, nutrient education and best practice.
- Delivery of information around physical, mental health and wellbeing support including safety.
- Delivery of planning advice and training to both farmers and members of the council planning team.
- Identification and highlighting of clear future career pathways in farming, agri-tech and agri-food to attract new entrants.
- Investigation of new trends in agriculture and agri-food.
- Provision of skills training such as business management, technical skills, marketing, food technology and digital skills.
- Provision of support for new entrants in farming enterprises.

#### **Recommendation 4: Appoint Agriculture Champions for the borough**

Council should appoint champions from within the industry who will influence farmers and agribusiness owners in the borough, promoting positive perceptions of farming, good practices, engaging in activities and programmes and raising awareness of agriculture in the borough. The champions must be passionate about the agriculture industry and the countryside.

The champions should focus on specific identified areas, potentially with each champion focusing on one thing only such as mental health, horticulture, environment and resilient farming. This could then be expanded to create linkages between farming regions in the UK, Republic of Ireland or Europe promoting strong knowledge transfer and enabling farmers from the borough to learn from what others are doing well.

This should also include a specific champion to promote women in farming and raise awareness of their contribution to the industry. This may include a regional review of the role of women in agriculture alongside setting up a panel of women farmers who have a passion for agriculture and would like to make a difference in our borough, collaborating with stakeholders such as UFU and Women in Business NI and learning from the Scottish model outlined earlier in the report. Any such initiative must be about positive action.

#### **Recommendation 5: Develop an Agriculture Centre for advice, training, demonstration and research**

During the course of this study, it was clearly identified that there was a need for the provision of training opportunities and advice for the local agriculture and agri-food sector. Ideally, this would be provided through a training hub or centre both physical and online platform.

It is recommended that a facility is developed at a suitable location in the borough. This new facility may consist of two components:

- Front of house - customer facing training facility, business unit with mental health provision
  - Back of house - advanced practice and product development and demonstration supported by industry experts and key stakeholders such as DAERA, AFBI, CAFRE, Queen's University Belfast, University of Ulster, utilising external funding.
- The centre has the potential to:
- Address the borough's training and business needs set out.
  - Be a place for farmers and agribusinesses to network, engage, and share their experiences and best practise.
  - Be a place to demonstrate new technologies and new products of benefit to the industry for example drone training and data systems.
  - Contribute to the ecosystem of agri research networks in UK and Ireland.
  - Deliver accelerate programmes and inspire innovation in the agri industry.
  - Enable collaboration with other food networks, environmental networks, agri-tech and food innovation centres/hubs across UK and Ireland to share best practice learnings and to focus on complementary research.
  - Facilitate and signpost existing support and advice to other key stakeholder groups, offering referrals.
  - Innovation research in agri food and agri tech.
  - Meet agriculture-training needs, develop farm business skills, assist knowledge transfer and practical implementation support for environmental practices to enable farms and business to reduce carbon.
  - Provide a base for the Food Heartland resources.
  - Provide a location for seminars, talks, clinics on relevant topics/trends by leading experts and the holding of workshops with planners.
  - Provide discreet mental health and wellbeing support and advice for the agriculture sector and advice on farm safety.
  - Transfer knowledge about farm diversification opportunities and discuss potential projects with case officers under the new SOAR/Rural Development Framework.

#### **Recommendation 6: Facilitate structural upgrading**

There is a real importance to the council either implementing or lobbying for improved structural upgrades. It has already been emphasised earlier in this strategy, the importance of good rural broadband, the upgrading of the electricity network to utilise all renewable energy we produce as well as to permit the electrification of heavy machinery. The provision of slurry tank management units will also be a priority in the future, especially as it lines up with 'output 2' in DAERA's Future Agriculture Framework.

### Recommendation 7: ABC rural strategy

There is an opportunity for council to look at wider rural development in the borough. This will build on the Agricultural Strategy to reach out to all rural dwellers including open countryside and consider how best council can address rural issues (social, economic and environmental) taking an inclusive and all-encompassing approach whilst considering the themes of the ABC Community Plan. This could be easily delivered by SOAR as preparatory work for the borough ahead of the findings from the Rural Policy Framework Consultation on future programmes.

### Recommendation 8: Further studies in agriculture sectors

The Agriculture industry is very broad, and this strategy will not provide all the answers. There are two important sectors that have not been explored fully in this report: the Equine Sector and Agri Food Tourism. Their contribution to the industry is very much interlinked and council may wish to further research their social, economic and environmental contributions, challenges and opportunities for development and growth in the borough.

Further collaboration is needed between council, DAERA, Tourism NI and Tourism Ireland to ascertain the potential of agri tourism in rural areas in a sustainable way.

### Recommendation 9: Agri-food development

As mentioned earlier, advancements in technology will play a key role in the agriculture industry and an important role in new product development in terms of introducing new product lines but also increasing productivity and profits. The borough is rich in artisan and large-scale food production, an area that has potential to grow and requires support to add value.

The Agribusiness/Food Survey identified an aspiration to grow and a need for spaces or units to enable businesses to expand their offering and for some it is important to have a place to nest. Food incubation spaces support the transformation of innovative concepts through to product development, with opportunity for the tenants or users to network and share knowledge. Incubation units are important to support new business start-ups, scale-ups, product transformation and business growth in the borough.

There is an opportunity for council to collaborate with stakeholders such as Invest NI and local enterprise agencies to bridge the gap in support for SME food and drink businesses and agribusinesses who require investment support in order to develop and grow. Council could collaborate and support SRC and CAFRE to explore and provide innovative growth support solutions, services and programmes in order to develop the agri-food businesses offering.

The agri-food sector will also be supported through initiatives and skills training referenced across the other recommendations.

### Recommendation 10: Promote the health and wellbeing of farmers and rural dwellers

Aligning to council's Community Plan outcome 'Healthy Community - people are making positive lifestyle choices. They are more resilient and better equipped to cope with life's challenges.' Council and Community Planning partners can help support to promote physical and mental health and wellbeing of farmers and rural dwellers, by raising awareness and signposting of programmes delivered by key stakeholders such as Rural Support, Southern Health and Social Care Trust, Yellow Wellies, Rural Networks, Public Health Agency, 'Take 5', UFU, Agri Aware and initiatives from council's Health Inequalities Team and ABC Loneliness Network.

Opportunities that could make a difference to health and wellbeing in the rural areas may include:

- Community Development led interventions.
- Developed and enhanced community trails and greenways.
- Outreach engagement and activity programmes.
- Promotion of healthy eating and the raising of awareness of where food comes from.
- Raising the awareness of social farming facilities and equine assisted therapy and learning.
- Sports clubs which champion increasing physical activity in their communities.

There is a need for a more joined up approach between statutory, community and voluntary sectors especially in relation to the access to funding ensuring that it reaches those most in need and perceived barriers are removed such as complexity of applications. Supporting the development of existing rural community assets as places where people can meet, interact, access services and enhance their health and wellbeing is also crucial and many rural communities' assets (church, village and sports halls) are underutilised.





Implementation plan

# 2.3 Implementation plan

Council should study the findings of this strategy to fully understand factors and influences on the agriculture industry, recognising that highly productive farming and environmentally enhanced farming and agribusiness is possible, but challenging for the industry. It is imperative that council recognise that engagement, support and training around environmental practices, targets and measuring is necessary for farming and agribusinesses to operate productively in a challenging landscape and realise the need for enhanced mental health and wellbeing provision specifically geared towards those in the agriculture sector both farms and agribusinesses.

The initial next step for council is to develop an action/activity plan to enable the delivery of the recommendations in this strategy. Below is a broad implementation plan, however the action plan will shape and provide clear direction.

## Immediate (6 - 12 months)

- Appoint 'Agriculture Champions' as per recommendation four.
- Collaborate and begin to raise the awareness of stakeholder agri and rural support programmes which are available to the borough, to support the industry immediately.
- Collaborate and research potential support and skills based programmes for the borough as per recommendation three.
- Collaborate with stakeholders to promote health and wellbeing.
- Define Food Heartland new priorities and responsibilities, commence its expansion and evolution as per recommendation one, securing funds for its growth from council and/or external funds for programme delivery.
- Deliver the Food Heartland Action Plan.
- Develop a communication plan to engage with farmers and agribusinesses, develop online agriculture resource hub and signposting as per recommendation two.
- Establish an ABC Agriculture Network.
- Increase the Food Heartland online and social media presence.
- Prioritise and scope the delivery of other strategies as per recommendations seven and eight.

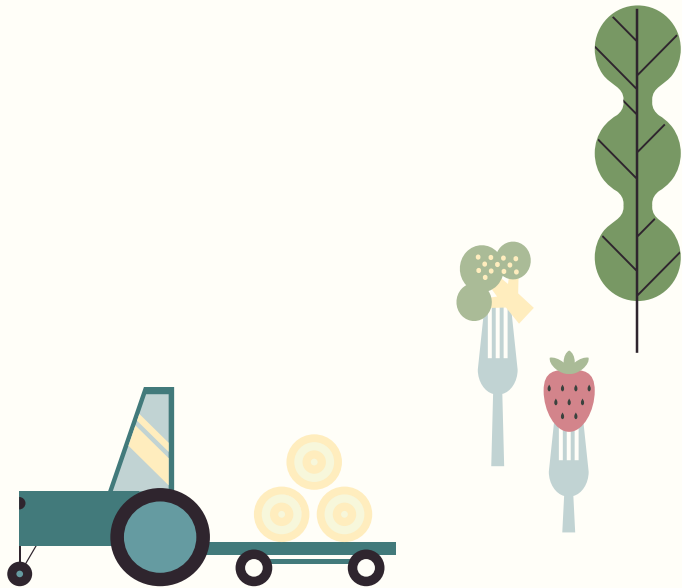
## Short term (1 - 2 years)

- Conduct further research into the development of facilities and growth spaces for businesses as outlined in recommendations five and nine.
- Conduct workshops between council departments e.g. SOAR, Planning, DAERA and agri stakeholders to better understand farm diversification, planning barriers and new farming practices/ requirements that lie ahead.
- Continue to develop an ABC rural strategy as outlined in recommendation seven.
- Continued expansion and evolution of Food Heartland as per recommendation one.
- Develop a programme of activities, seeking out experts in agriculture, technology and environmental practices as per recommendation three.
- Provide targeted and specific business and technological (not technical) training and support as per recommendation three.
- Research, collaborate and lobby for structural upgrading to support the industry as per recommendation six.

## Medium term (3 - 5 years)

- Council should develop a physical space as outlined in recommendations five and nine for the provision of support, innovation, growth and development of the agriculture industry.

Please note: All information contained within this report was correct at the time of publication.





## About Birnie Consultancy

Birnie Consultancy is a solutions driven agri-food consultancy working with farmers, primary and secondary processors, supermarkets, levy bodies, advisory organisations, charities, research institutions and governments across the UK and Europe. We design and manage commercial and research projects, write, and implement strategies, deliver in-depth technical analysis and reporting, manage farmer groups, deliver knowledge exchange, manage funding applications as well as delivering design. Our approach to working with clients is solutions-focused and highly consultative - we pride ourselves on working closely and well with our clients. Our agri-food experts drive growth and transformation by enabling and driving excellence in organisations.

We bring our expertise to organisations across the whole food chain, nationally and internationally, to drive business performance and operational improvements while helping our clients build on their capabilities, productivity, profitability, enabling them to access different markets, boost their competitiveness and add customer value while building on delivering sustainability.

More information about the company can be found online at [🌐 birnieconsultancy.com](https://www.birnieconsultancy.com).



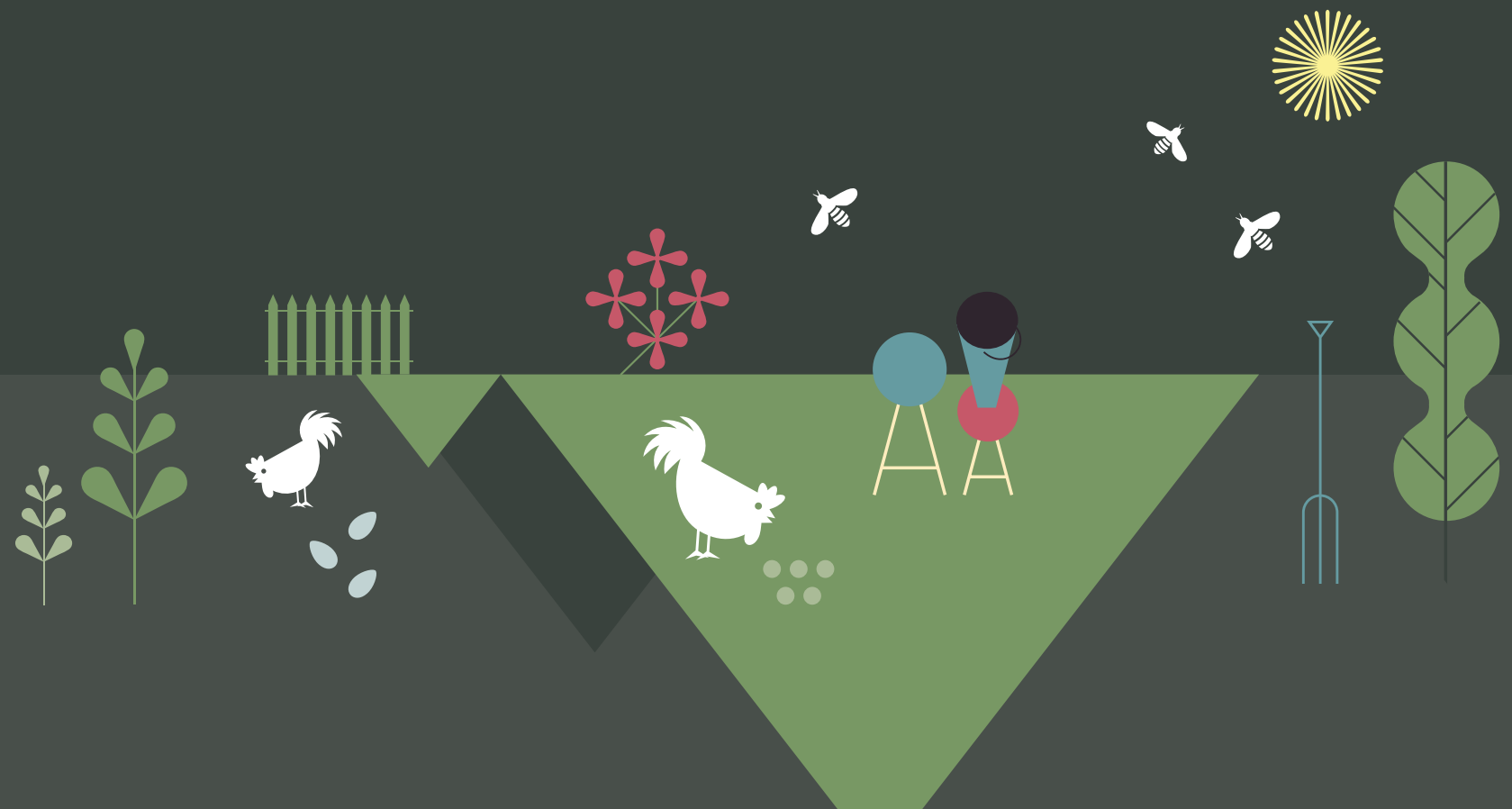
Dr. Jonathan Birnie  
Principal Consultant  
🌐 [jonathan@birnieconsultancy.com](mailto:jonathan@birnieconsultancy.com)



Ashley Hassin  
Communications Manager  
🌐 [ashley@birnieconsultancy.com](mailto:ashley@birnieconsultancy.com)



# Appendices



# Appendix One: Summary of Consultations

DATE	CONSULTATION GROUP
Ongoing	Engagement with DAERA, Agri-Food and Biosciences Institute (AFBI), Rural Support, Ulster Farmers’ Union (UFU), SRC, CAFRE, Invest NI, Agri-Food Quest at Queen’s University Belfast, and council departments (see below).
Ongoing	Conversations with agribusinesses and organisations including SlurryKat, Armagh Cider Company, NFU Mutual, Loughgall Beekeeping Association and AgriSearch.
January 2021	Internal council officers workshop
February 2021	Individual consultation sessions across departments and initiatives: <ul style="list-style-type: none"><li>• Community Planning, Community Development including Policy and Diversity Officer</li><li>• Environmental Health</li><li>• Food Heartland</li><li>• Mid South West Regional Growth Deal</li><li>• Planning</li><li>• Policing Community and Safety Partnership (PCSP)</li><li>• Southern Organisation for Action in Rural Areas (SOAR)</li><li>• Tannaghmore Rare Breeds Animal Farm, Biodiversity Team and Sustainable Farming Projects</li></ul>
February 2021	Elected Members presentation and workshop
February 2021	Presentation and discussion with Irish Central Border Area Network (ICBAN)
February 2021	Elected Members presentation and workshop
May 2021	Presentation at Economic Development and Regeneration Committee workshop
June to July 2021	Farmers Survey (Public)
July to August 2021	Agribusiness/Food Survey (Public)
September 2021	External stakeholder engagement and feedback session
September 2021	Agribusinesses engagement and feedback session
September 2021	Presentation to Economic Development and Regeneration Committee
September to October 2021	Draft Agricultural Strategy - Public Consultation and Policy Screening

# Appendix Two: Equine businesses identified in the borough

- Annaghmore Saddlery & Country Wear
- Brookland Stables
- Cullen Equine Solutions
- Dukes Livery Stables & XC Hire
- In Touch Equestrian
- Iveagh Branch of the Pony Club
- Lodge Equine Stables
- Mastin Moore Equestrian
- McCusker Stabling Ltd
- Meadows Equestrian Centre
- Millers Hill Riding School
- Mossvale Equestrian Centre
- Moy Riding School
- Oakwood Riding School
- Phils Farm
- Portmore Equestrian Centre
- Premier Saddlery Ltd
- Riding for the Disabled Association (RDA) Groups/Centres
- Sarah Dawson Racing
- Shanaghan Veterinary Services
- SVS Equine and Shanaghan Farm
- The Equine Touch Ireland
- Tri Equestrian NI
- Tullyloob Equine Ltd
- VM Equestrian Services



# Appendix Three: ABC agribusiness stakeholder directory

## Agricultural Business

Agricultural Trading Merchants Ltd  
AgriHealth  
Annamore Saddlery & Country Wear  
Ball Bros  
Burkes Agri Supplies Ltd  
Clarendon Agricare  
Coburn's  
Countrywide Farm Health  
Diffin Farm Tools & Agri Supplies  
E & J Murray & Sons  
Eden Farm & Garden  
Eringold Enterprises  
Etra Feeders Ltd  
Fane Valley Stores  
Farm Chemicals Ltd  
Farmline Agricultural Supplies  
Germinal (NI branch)  
Go UK Ltd  
Greenfield Fertilisers  
JF McKenna Ltd  
Kings Mill farm supplies  
Len McCoy  
Liveryman  
McGeary Mushroom Compost Ltd  
Natural Farm Health  
Neotech Agri  
Old Mill Farm Supplies  
Premier Saddlery  
Provita Eurotech Ltd  
Reen Compost Ltd  
S Lappin  
S Muldoon Agricultural supplies  
Scully Grower Supplies  
Stanley Aiken  
T H Bullick  
The Country Store  
Trevor McAllister

UPU Industries Ltd  
Victor Foster Poultry Services Ltd

## Animal Services

Genus ABS (NI branch)  
Iveagh Vets  
Johnstons of Mountnorris  
Lagan Valley Vets  
Lurgan Veterinary Clinic  
MacRoberts Bros Hoof Trimming  
Mossvet Ltd  
Shanaghan Veterinary Services,  
SVS Equine and Shanaghan Farm  
The Willow Veterinary Clinic  
Tullyraine Equine Clinic

## Agri Equipment Manufacturers

Muldoon Transport Systems  
NC Engineering  
Newrock Engineering  
Plant Mec Ireland  
RAM Engineering/Slurry Spec NI  
RedRock  
SlurryKat

## Agri Equipment Suppliers

Ben Sergeant Tractors/ MF Tractor Spares  
Burkes of Cornascriebe  
David McGrath  
Derryhale Tractor, Machinery & Van Sales  
G.A. Allen  
George Milliken Tractors  
Gribben Tractors  
JMK Quads  
John A Weir & Sons  
Kieran Fegan Tractor Sales  
Oscar McCall  
Simms Bros

T.H. Jenkinson & Co  
Throughton & Bell  
*Note: some may also align to the  
agri-technology section*

## Agricultural Contractors

Cairns Contracting  
Crawley Contracts  
Frank & Mary Gollogly & Sons  
Glenview Farm Services  
Hillis Contracts  
Ivan Megaw & Son  
John Dan O'Hare  
Ken G Lundy  
N D & Sons Berry  
Neil McMullan  
Ronnie Anderson  
Scarva Contracts  
Wallace Contracts  
Wesley Livingstone

## Food & Drink

Adrian Boyd Scotch Eggs  
Amberline Preserves  
Annaghmore Mushrooms  
Apple Blossom Bakery  
Armagh Cider Company  
Avondale Foods  
Ballylisk of Armagh  
Ballymorán Meats  
Barnhill Orchards  
Benburb Mushrooms  
Big Cox Cider  
Brownlee Preserves  
Burren Balsamics  
Button Farm Mushroom  
C&J Meats  
Cakes and cookies  
Chapman Foods of Battlehill Ltd  
Clanconnel Brewing Company  
Cobden & Brown  
Cottage Desserts  
Cottage Pride by Brownlee Preserves  
Davison Cannery Ltd (Simply Puddings)  
Dunlarg Dexters

Duvillaun Fine Foods  
Elliott's Tradition  
Evron Foods Ltd  
Farm Gate Meats  
Farm Gate Meats  
Farringford Foods Co Ltd  
Flanagan's Butchers  
Forest Feasts  
Forthill Farm  
Fosters Chocolates  
Gilfresh Produce  
Grahams Bakery  
Granny's Fayre  
Hannahs Cake Craft  
Harnett's Oils  
Hendersons Fruit & Veg  
Hollah Preserving  
Holmes Bakery  
Hughes Craft Distillery  
Irwin Bakery  
Island Salads  
Ispini Charcuterie  
John R. Dowey & Son (Doweys)  
Just Desserts and Pastries  
Karri Kitchen  
Kestrel Foods/Forest Feast  
Kitchen Bakes  
L'Artisan Foods  
Long Meadow Cider  
M & W Farm Meats  
MacIvers Cider Company  
McCartney's of Moira  
McCormack Potato Ltd  
McCracken's Real Ale  
Meadow Farm Quality Foods Limited  
Natural Umber  
New Found Joy  
Northway Mushrooms  
Orchard Organics  
P McCann and Sons  
Pinkertons Pork Armagh  
Pomona Orchards  
Quails Fine Foods  
Ristretto

Rooney Fine Foods  
Simply Irresistible  
T Knox Butchers & Deli  
T Loney & Sons  
The Classic Mineral Water Company  
The Krazi Baker  
The Yellow Door  
Troughton's Premium Mixers  
W.J. Holmes & Son Family Butchers  
Wasabi Crop Ltd  
Weir's Organic Raw Milk  
White's Oats  
William Sprott  
Wilson's Country Ltd  
Windsor Bakery  
Woodlab Distillery Ltd  
WR Crawford

**Marts**

Markethill Livestock & Farm Sales  
Keady Livestock Mart

**Abattoirs**

Prime Stock Meats (Hewitt Meats)  
ABP Lurgan

**Food Processors & Large Producers**

ABP Food Group (NI branch)  
Anne Dunlop  
Armagh Potato Company Ltd  
Avondale Foods  
Bawnbua Foods  
C & J Meats  
Craic Foods Ltd  
Dairy Fresh Foods Ltd  
Davisons Quality Foods  
Denny Henry & Sons  
Discount Commodity Supplies  
Evron Foods  
Farmers Pork Company  
FarmLay Eggs  
Farringford Foods Ltd  
Gilfresh Produce  
Glanbia Cheese Ltd  
Hannan Meats

Hewitt Meats  
Hungry House Sandwiches  
Irwin Bakery  
James A S Finlay Holdings Ltd  
JE Howe  
Kerry Foods (Portadown branch)  
Lakeland Dairy NI  
Lind Ingredients & Spices  
Linwoods  
M.R Foods Wholesale Ltd  
Mackle Apple  
Mackle Snacks  
MacNeice Fruit Ltd  
McCabe's  
McCormack Potato Ltd  
Morris Davison  
Moy Park  
Old Park Foods  
Orchard Fresh Foods  
PPM Food Services  
Robert Clarke Eggs  
Tayto  
UMI Foods  
United Wines  
Universal Meat Company  
Wallace Greer

**Agri Technology**

AJ Power  
Farm compare  
Genus  
Kingspan Water & Energy  
O B E Waste & Agri  
Ubloquity

**Farm Shops**

Chapmans Farm Fresh  
Fegan's Farm Shop  
Forthill Farm Shop  
Greenmount Farm Shop  
Meadow Farm Foods  
Moyallan Farm Shop  
Seagoe Farm Shop  
The Olde Mill Garden Centre & Farm Shop

**Feed Firms**

A-One Feed Supplements Ltd  
Ballinaskeagh Grains Ltd  
Beattie's Pet Foods  
Biomeconnect  
Frazer Animal Feeds  
Freeburn Farm Feeds  
J Bell  
J Donaldson  
Masons Animal Feeds  
Morton's  
Tully Herron Farm Feeds  
W K Powell

**Other**

A I Trading UK Ltd  
AB Refrigeration & Air Conditioning Ltd  
Bunzyl McLaughlin (NI branch)  
Checkweigh Scales  
Cross Group NI (NI branch)  
Domestic Sheepskins  
Elmfield Estate  
Food Equipment Services NI  
G & S Services  
Glaze & Roll Catering  
Indi Woods  
Lisnabrogue Lodge Glamping Pods  
Massey Catering  
McClelland Little Farms  
McGrath Bakery Services  
McShane Packaging  
Orchard County Enterprises  
Ramsey's Fine Foods  
Shanaghan Farm  
South Lough Neagh Regeneration Association  
T.Loney & Sons  
The Red Bus Company  
Van Sales & Frozen Foods







# INTERESTED IN AGRICULTURAL DEVELOPMENT

in the Armagh City,  
Banbridge and  
Craigavon Borough  
Council area?

## We want to talk to you

Please contact the **Community  
and Growth Directorate** at  
Armagh City, Banbridge and  
Craigavon Borough Council

 0300 0300 900

 [info@armaghbanbridgecraigavon.gov.uk](mailto:info@armaghbanbridgecraigavon.gov.uk)

 [armaghbanbridgecraigavon.gov.uk](http://armaghbanbridgecraigavon.gov.uk)

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