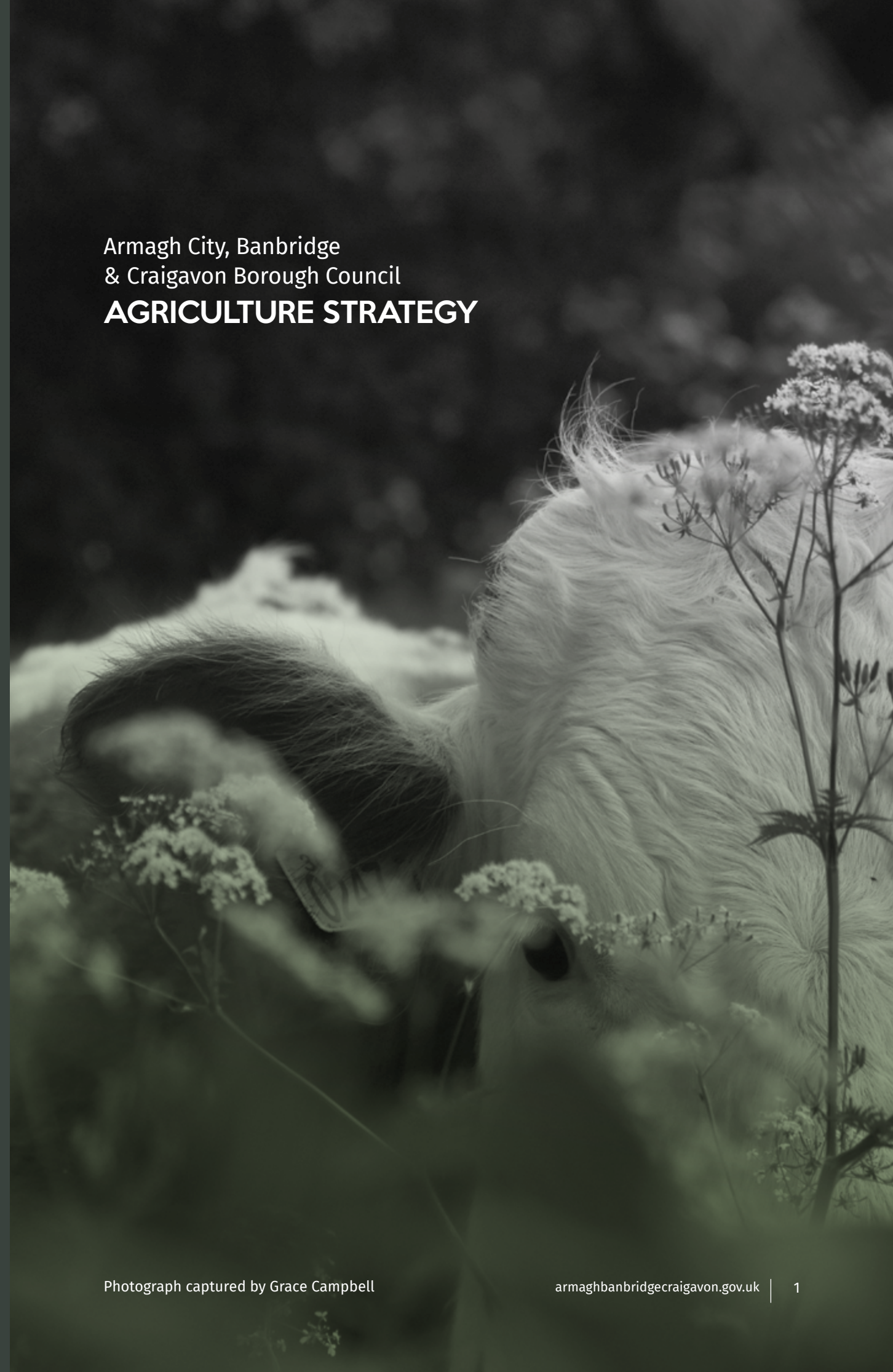


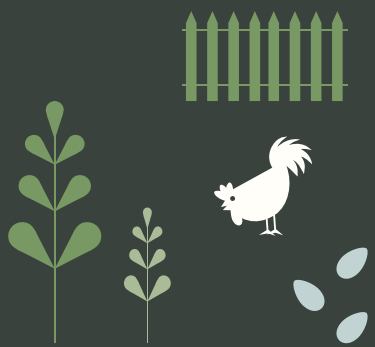
ARMAGH CITY,
BANBRIDGE &
CRAIGAVON
BOROUGH COUNCIL



Armagh City, Banbridge
& Craigavon Borough Council
AGRICULTURE STRATEGY



Photograph captured by Grace Campbell



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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.



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.

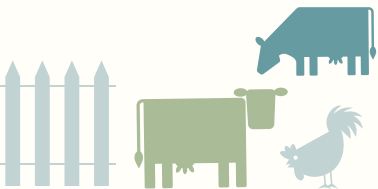
The council already operates some strong facilities and initiatives such as Food Heartland, a well-established programme which promotes the food sector in the region. Tannaghmore Rare Breeds Animal Farm is another asset, with knowledgeable staff who are already training the farmers of tomorrow through 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.



Emerging from exploring the key themes outlined in the main document, 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

Long version of this strategy

For a more comprehensive look into findings of the ABC Council Agriculture Strategy including appendices, please contact agri@armaghbanbridgecraigavon.gov.uk to obtain a copy of the strategy in full.

Armagh City, Banbridge and 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-19 pandemic, changes in planning policy and associated environmental issues, fluctuating market prices, weather events, diseases, and perhaps most significantly for the 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.

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.



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">• Community Planning, Community Development including Policy and Diversity Officer• Environmental Health• Food Heartland• Mid South West Regional Growth Deal• Planning• Policing Community and Safety Partnership (PCSP)• Southern Organisation for Action in Rural Areas (SOAR)• Tannaghmore Rare Breeds Animal Farm, Biodiversity Team and Sustainable Farming Projects
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



1.1 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 agribusinesses 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, who already demonstrate 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 farmers' 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% of farmers were impacted by anxiety and depression to some degree respectively.

According to our 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 the 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 1,404¹ 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, this enables 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.

¹ DAERA "Migrant Labour in Northern Ireland Agriculture" 2018



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.

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.

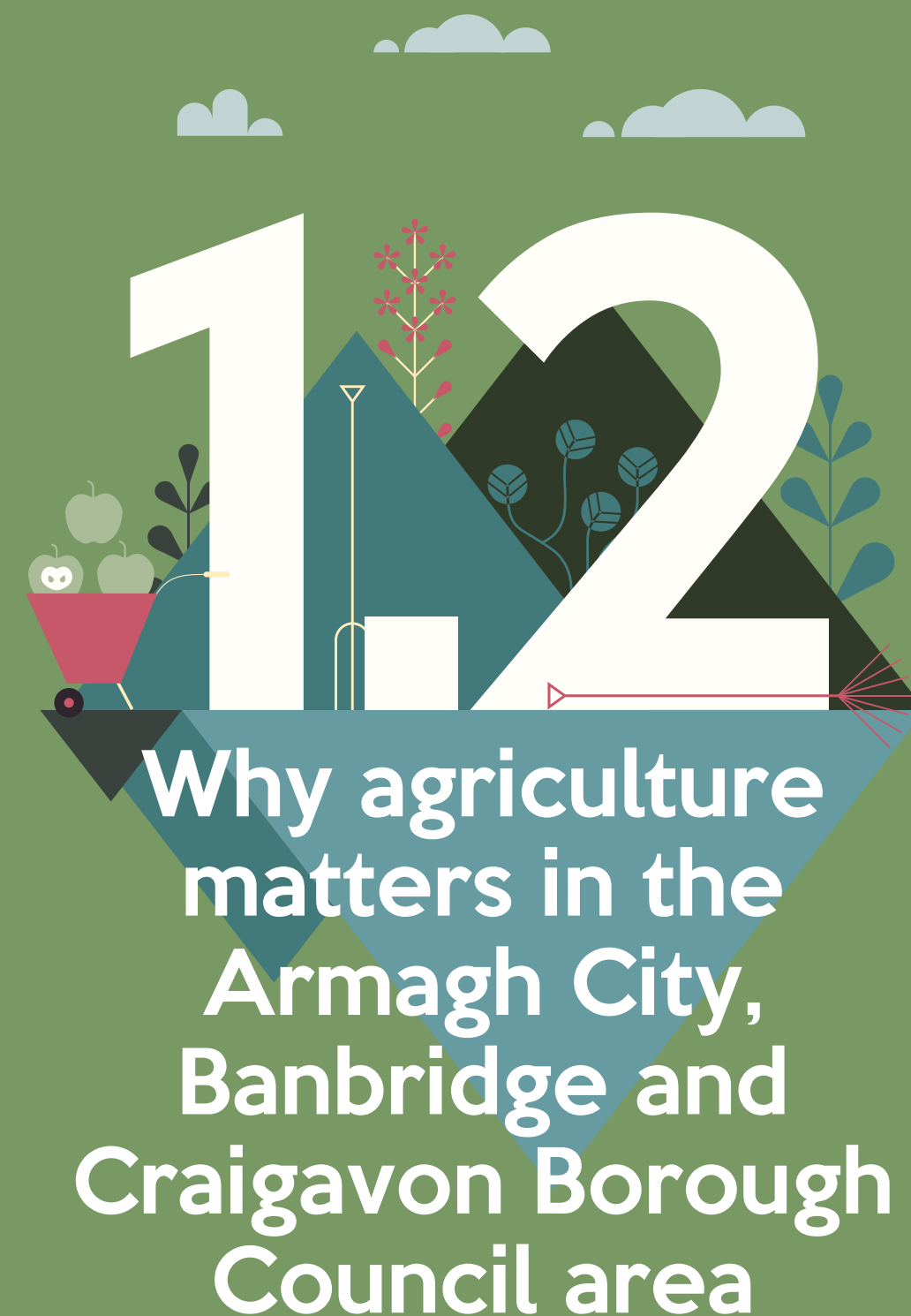
There is an opportunity for council to build relationships across the primary agriculture industry, particularly at farm business level and to raise recognition that farmers are operating in a business environment. Council have an opportunity to provide advice and information workshops e.g. in terms 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 our 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.



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.

It is described in the long version of this strategy, 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 sector within Armagh City, Banbridge and Craigavon Borough Council

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 NI 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 NI² in terms of enterprise mix and as a proportion of NI 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%

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

ABC Council leads in six farming enterprises including horticulture, cattle/sheep (lowland), mixed farming, cereal, general cropping and other farming. It is second in pigs and poultry and third in dairy.

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 (see breakdown below).

Table 2
NI agricultural incomes in 2020³

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

Farming income by enterprise in the borough

In 2020, there were a total of 3,431⁴ 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 3 shows the actual profitability of each sector.

3 DAERA ‘Northern Ireland Agricultural Incomes in 2020’
4 DAERA ‘Agricultural Census 2020’

Table 3

Farm business incomes in Northern Ireland⁵ 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 ⁶	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 NI 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.

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.

⁵ DAERA 'Farm Incomes in Northern Ireland 2019/20'

⁶ Combined Lowland & LFA figures from DAERA 'Agricultural Census 2020'

Table 4

Farm enterprises in MSW Region vs the rest of NI⁷

	% 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 5

Breakdown of farm enterprises in MSW Region⁷

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.

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.

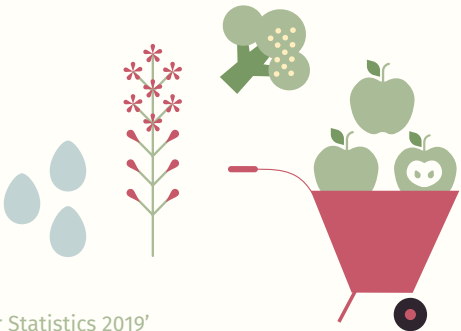
Beef and sheep meat and, milk and milk products are the largest sub sectors in terms of gross turnover. However, their combined share of total gross turnover decreased by 1.1% from 2018, which bodes well for the MSW Region as it holds a large proportion of these enterprises.

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

⁷ NB: Percentages calculated from figures taken from DAERA 'Agricultural Census 2020'

Table 6
Gross turnover, by subsector, 2018 and 2019⁸

	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
Total sector	5172.3	5365.2	3.7



8 DAERA ‘Northern Ireland Food and Drinks Processing Sector Statistics 2019’

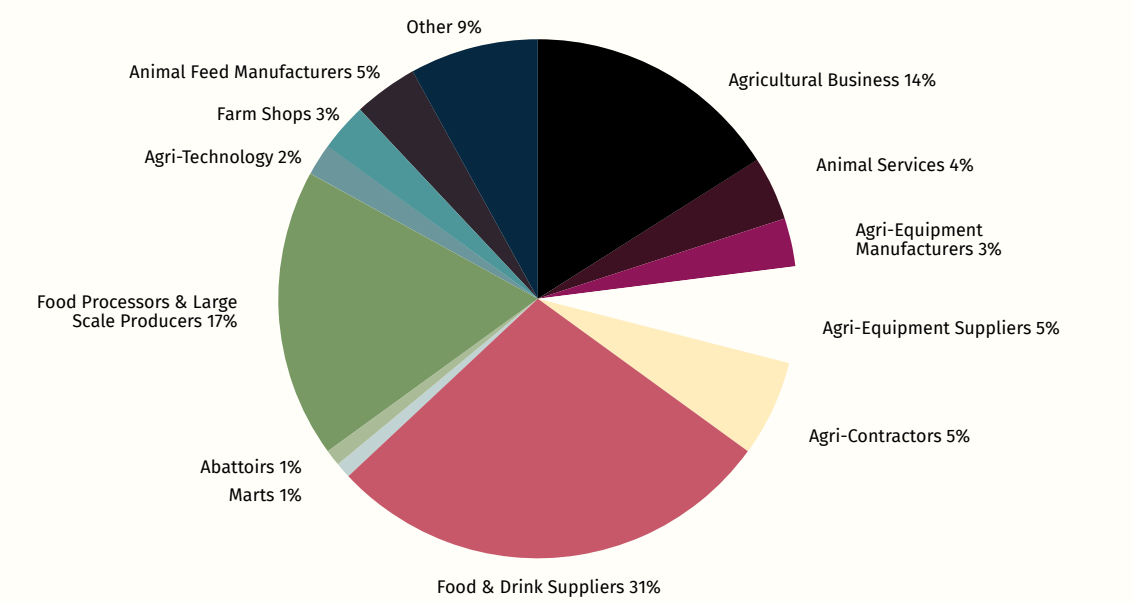


1.4 An overview of agribusinesses in the borough

In addition to the farms in the borough, a scoping exercise-identified over 265 businesses 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. 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 1 (below) shows the percentages of the different businesses which are dependent on, or significantly impacted by primary agriculture.

Figure 1 - Agribusinesses in the borough



The businesses and description are shown in table 7 overleaf.

Table 7

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.



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



1.5 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.

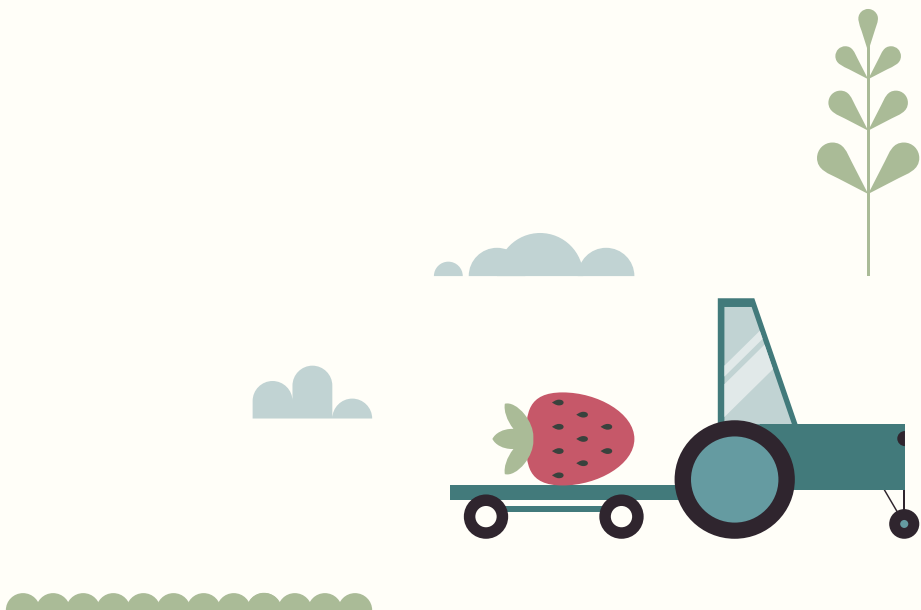
- Farming is not treated as a business by some farmers leading to an unviable business unit.
- Farming tends to be considered as one entity, whereas it usually has multiple enterprises.
- Low level of knowledge about practices which can protect and enhance the environment.
- Low levels of joint working, 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 years⁹.
- 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

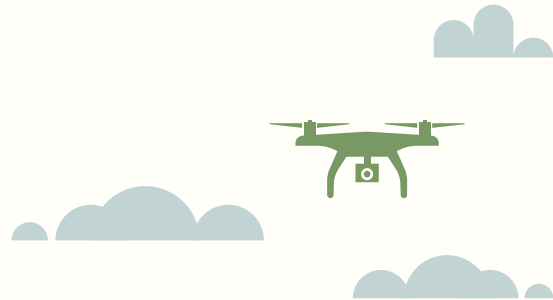
- Capital investment intervention opportunities to support agri-tech/food as part of the MSW Regional Growth Deal
- Collection and use of data for management.
- Delivery or facilitation, identifying potential ideas and support for businesses and making them easier to access including marketing, social 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).
- Education for the consumer to understand where food comes from, cooking skills etc.

⁹ Northern Ireland Statistics and Research Agency (NISRA) 'Northern Ireland Food and Drinks Processing Report 2019'

- 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.



2.1 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:

- The relaunch of the Food Heartland brand to include agriculture, including redesign of imagery and 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 agribusinesses

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 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.



Photograph captured by Emma Liggett

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 in the long version of this 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:

- a. Front of house - customer facing training facility, business unit with mental health provision
- b. 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 and discussed in the long version of this strategy.
- 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 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.



2.2 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.

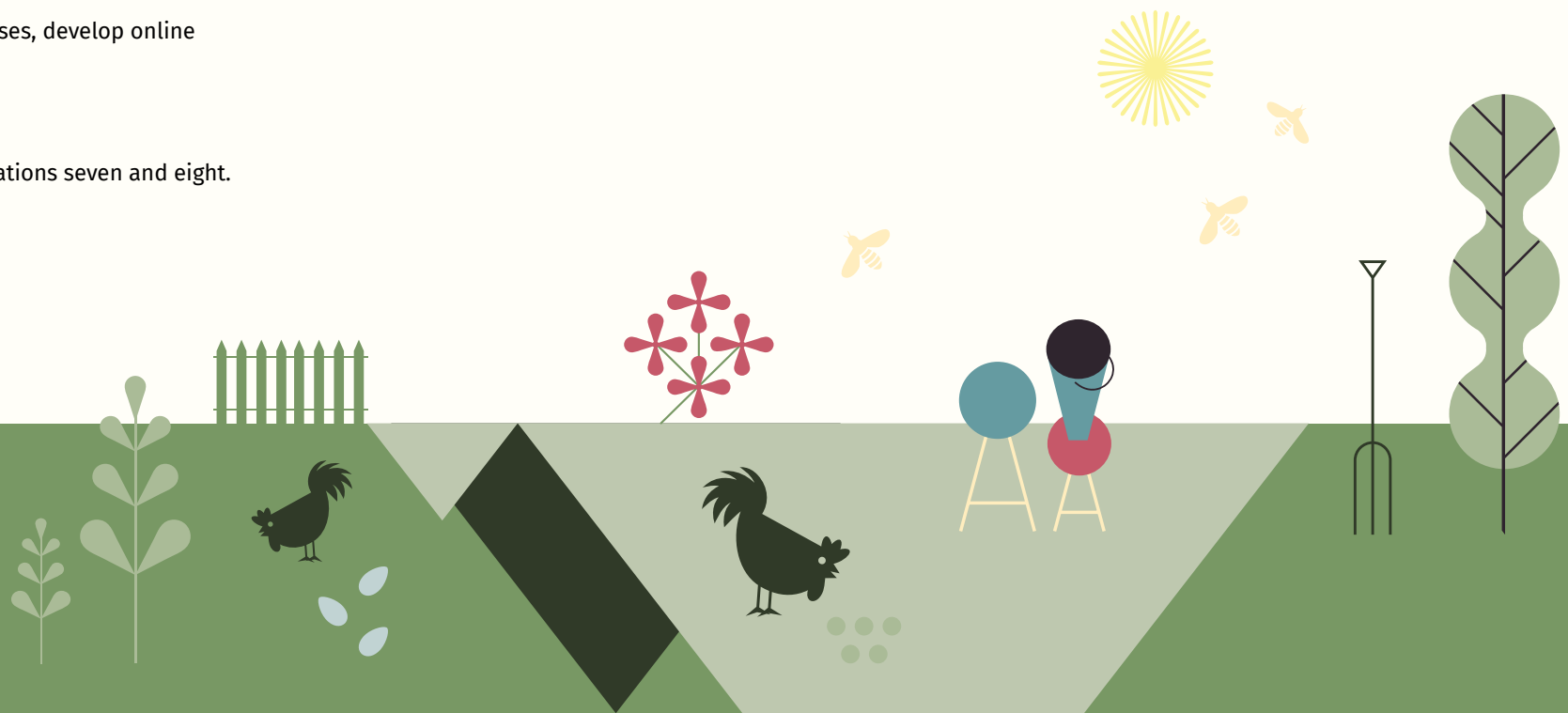
Short term (1 - 2 years)

- 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.

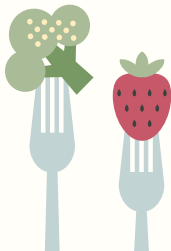
More information about the company can be found online at [🌐 birnieconsultancy.com](https://www.birnieconsultancy.com).



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



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





INTERESTED IN AGRICULTURAL DEVELOPMENT

in the Armagh City,
Banbridge and
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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

 armaghbanbridgecraigavon.gov.uk

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