



Department of
**Agriculture,
Fisheries and Food**
An Roinn
**Talmhaíochta,
Iascaigh agus Bia**

Food Harvest **2020** Milestones for Success



Foreword

I am delighted to be introducing the first annual progress report of Food Harvest 2020, prepared by my Department in collaboration with Enterprise Ireland, the Environmental Protection Agency, Bord Bia, Teagasc and Bord Iascaigh Mhara.

Since becoming Minister for Agriculture, Food and the Marine, I have wholeheartedly embraced the Food Harvest 2020 strategy and I am totally committed to ensuring it is a success. Over the last 12 months it has evolved from being a high level strategy into a shared blueprint for everyone involved in the sector. The strategy was written by a committee, chaired by Dr. Sean Brady, which was representative of all parts of the sector, big and small and its implementation is dependent on everybody involved with food in Ireland.

I have been very impressed that 91% of the 215 initiatives have commenced. However, I am conscious that it is only the start of the journey and I am determined to build on this good start. I am very aware that many of the steps needed to be achieved by 2013 and 2015 are primarily commercial decisions for industry but I hope that the industry will work with me and the State Agencies to meet, and indeed exceed, the ambitious targets. I intend to continue to set and measure quarterly targets and to personally chair the high level implementation committee.

These are challenging times for our country. Difficult decisions, arising primarily from increased competition for limited national funding and competing priorities, must be made. However we are involved in one of the few sectors that can realistically lead Ireland's economic recovery. It is a unique opportunity that we need to embrace and succeed. I know that the Irish agri-food sector has extraordinary potential for growth and I firmly believe that Food Harvest 2020 is the correct approach to realising its potential.

Finally, I would like to thank all of you who have worked so hard to ensure we got off to a good start and I would encourage each of you to build on this start and push on to exceed the targets set out in the plan. I look forward to personally working with many of you over the next 12 months as we seek to take the industry forward to the next level.

Simon Coveney, TD
Minister for Agriculture, Food and the Marine.

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1 Executive Summary



Context

It is now one year since the publication of the Food Harvest 2020 Report, a strategic plan drawn up by a committee of industry representatives for the development of the sector over the coming decade. The report, which set ambitious future growth and development targets, inspired renewed confidence in the future of the whole agriculture, food, drinks, fisheries and forestry (agri-food) industry. The key message of 'smart green growth' encapsulated a vision of dynamic future growth based on innovative and sustainable development and this resonated well with producers and the wider food industry.

Much has happened over the intervening year and this is now an opportune time to review the progress that has been achieved to date and to set out some strategic future **milestones for success**.

The vision contained in the Food Harvest 2020 report was one of enormous opportunity for a dynamic, consumer focused, forward looking agri-food industry. The overall goal was by 2020, to increase the value of primary output by 33%, the value-added by over 40% and exports by 42%. In order to achieve these ambitious targets Food Harvest 2020 set out 215 specific recommendations. These necessitated a coordinated response from government and state agencies and a strong commitment by private stakeholders to drive progress across a range of areas and ensure that the groundwork was in place to sustain future growth.

A High Level Implementation Committee (HLIC) was established to coordinate the state response and has met regularly in the last year under the chairmanship of the Minister for Agriculture, Food and the Marine. This has served to focus attention on key areas and to identify critical challenges to be confronted and resolved before success can be achieved.

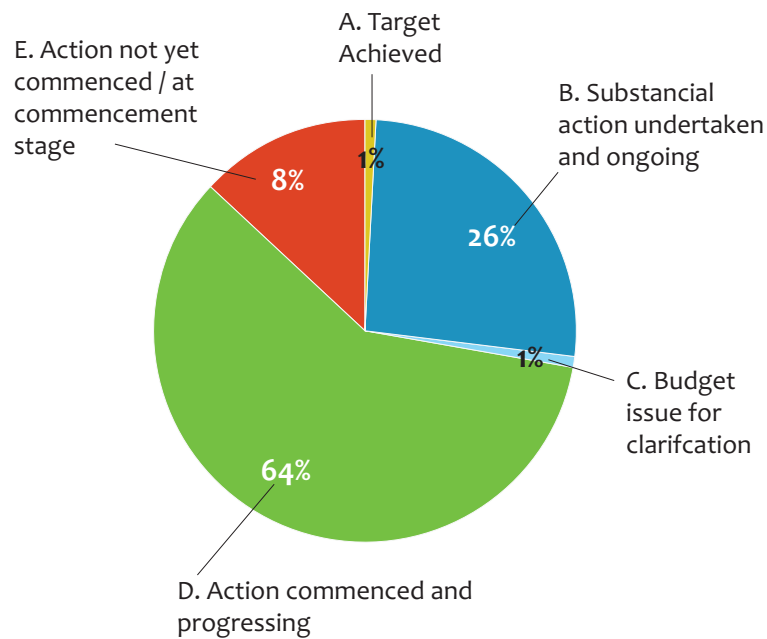
Despite the challenging global environment and prolonged recession in many of our export markets, the last year has been a good one for the sector and has seen an upturn in agri-food exports which have grown by over 11% in 2010. This strong growth has continued in 2011 with exports for the first five months estimated to have increased by €400 million or 13% with prospects for the remainder of 2011 broadly positive.

Parallel with this very positive performance on the export market, conditions domestically have been difficult, with a weak market and reduced exchequer support. Nevertheless, Food Harvest 2020 presents a once in a lifetime opportunity for a real step change in the sector. Continued success requires strong determination, major collaborative effort and full buy in at all levels within the industry. The HLIC will continue to drive a joined-up effort from all the relevant state agencies, albeit with reduced resources, but the primary role in achieving the vision set out in Food Harvest 2020 rests with the private sector. Ultimately it is the innovation, entrepreneurial skill and commitment of our farmers, fishermen and food companies that will drive success in the sector.

Summary Progress

As illustrated in the chart beneath, action has commenced on 91% of the Food Harvest 2020 recommendations. Full details on each of the 215 recommendations are contained in the Annex

http://www.agriculture.gov.ie/media/migration/press/July_21_2011.pdf



Substantial progress has been achieved on over a quarter of the recommendations and the outputs achieved are illustrated by the initiatives across.

Section 2: Presents examples of ‘smart’ ‘green’ initiatives progressed since the publication of Food Harvest 2020.

Section 3: Sets out the key actions for the coming year as well as targets to be achieved by 2013 and 2015. These ‘Milestones for Success’ will enable us to benchmark our progress in future years and ensure that we remain on track to deliver in full on the promise contained in Food Harvest 2020.

Commercial Focus

Food for Health Ireland (FHI), a multi-million euro project, has produced 4 new functional components from milk, illustrating the commercial synergies that can arise when dairy industry know-how is combined with expertise from State Agencies (EI, Teagasc) and academia (UCD, UCC, UL).

Demonstrating Green Credentials

Bord Bia, in partnership with The Carbon Trust and Teagasc, secured accreditation for its beef carbon footprint model. This is now part of the Beef and Lamb Quality Assurance Scheme (BLQAS), making it the first such scheme to include environmental criteria. Plans are in train to extend this model to other products and to include additional environmental benchmarks on water and biodiversity. This is an important practical step towards the Brand Ireland objective.

Leadership Capability

The EI leadership for Growth (L4G) programme, funded by DAFM, is challenging and changing the mindset and capability of Irish CEOs and their senior management teams. Programme outputs include greater strategic clarity and a stronger sense of confidence and ambition.

Knowledge Transfer

The Greenfield Dairy Farm uses a commercial farm to provide a national blueprint for low-cost milk production. Its online service, augmented by farm walks, gives real-time data on its management plans, milk yields, financial data, animal health status and other critical issues. Over the past year, up to 3,000 farmers have participated in these walks with a large number of visitors to the website.

2 Progress achieved one year- on

Working Collaboratively


-  **Food for Health Ireland** is a State-industry-3rd level technology project to discover and commercialise functional ingredients of milk.
- The Teagasc/ UCC Alliance is creating a single portal for their combined research and innovation supports to food companies.
- Bord Bia has progressed the establishment of eight co-opetition * projects.
- Teagasc and meat processing companies are conducting research projects on dairy beef production (in view of its likely expansion) and on optimal bull beef production systems.
- Major dairy companies and Teagasc have agreed new joint farm development programmes to address the challenges of *Food Harvest 2020*.
- The 2010 DAFM Research Call, worth €10m, across the FIRM, Stimulus and COFORD programmes, reflected FH2020 priorities.
- Bord Bia collaborated with a number of agencies to showcase Irish food to best advantage during the recent Royal visit to Dublin and Cork.

Innovation in Operation

Acting SMART


-  **BIM's Seafood Development Centre** supported 180 companies, launched new products (organic mussels and a range of seafood based microwaveable meals) and achieved a 20% price premium.
- Over 200 Innovation Vouchers allowed companies explore commercial ideas and innovative techniques with 3rd level institutions.
- Teagasc's new Technology Support for SMEs provided science-based innovation support, including new product development (NPD) & testing, for over 300 food business clients.
- Bord Bia's has populated its website with  **foresight4food** case studies to illustrate practical, consumer-focused innovation in action, while 30 companies availed of its consumer research to support NPD in the last year.
- DAFM's expanded online service facilitated the extension of ICT skills at farm and industry level, simplified processes and reduced error levels. The 2011 online applications showed increases in Single Payment (25%), Forestry (53%) and calf registrations (45%).

Smarter Farming

- The Dairy Expansion Activation Group has completed 16% of the 54 projects in the dairy roadmap while detailed action plans have recently been developed for the beef and horticulture sectors.
- The number of participants in dairy discussion groups has increased by 3,000 to over 6,000, resulting in an average economic return of around €200 per hectare.
- Teagasc and ICBF launched genomic selection for dairy cattle breeding with potential to deliver an 8:1 benefit-cost ratio. Ireland was the 2nd country in the world to introduce this programme and currently over 45% of AI inseminations are based on genomically selected sires.
- Sectoral roadmaps, with detailed farm metrics and milestones, have been developed by Teagasc for Dairy, Beef, Pigs, Sheep, Environment, Tillage, Forestry and Horticulture to deliver the FH2020 targets.
- Teagasc 100  **BETTER farms** demonstrate best practice in commercial farming situations while the 24 farms in the agribusiness, joint programme showed a 40% increase in dairy milk solid production between 2005 and 2010.

*Business strategy where firms compete in some areas and co-operate in others to reduce costs, improve quality, supply a large customer, etc.

Developing Leadership and Entrepreneurship

- Under the EI Leadership programme L4G, 27 leading food CEOs and their senior management teams are using this international programme to transform their management and leadership skills.
- Bord Bia Marketing Fellowship. The 2010/2011 programme has 25 business graduates involved with 80 companies and 100 assignments. The previous programme delivered contracts worth €2.5m.
-  **Bord Bia's new Vantage** web site incorporates a 'starting your own food business' section.
- A Food Entrepreneurs Network (FEN) has been initiated by Bord Bia which will now start linking new or small food companies with a panel of more experienced entrepreneurs.
- A dairy herd management degree course is being run by Teagasc/UCD to develop the business, technical and entrepreneurial skills needed to manage large commercial businesses.
- A record 1,170 students enrolled in a wide range of Teagasc educational programmes in Autumn 2010, bringing the total student complement to over 3,000.

Knowing our Consumers

Acting SMART

-  **Periscope**, Bord Bia's consumer research conducted in 10 global markets on attitudes to food, health, consumption and environment has facilitated Irish companies to target new markets.
- Bord Bia has continued to update its global Consumer Lifestyle Trends project which taps into a network of 46 cities in 28 countries to identify and capitalise on trends.
- Research has been conducted on the application of dairy products to sports nutrition.
- Extensive consumer research has been conducted in 6 countries to test a range of Brand Ireland propositions.
- Bord Bia, Failte Ireland, & Tourism Ireland are jointly developing consumer orientated messages and themes to market Irish food tourism.
- Consumer suggestions for improving both farmers markets and the Good Practice Banner were outlined to operators at regional workshops.

Achieving Competitiveness


- The 3 LEAN competitiveness programmes (Lean Start, Lean Plus, Lean Transform) have been rolled out to 26 food exporting companies. These programmes are operated by EI and funded by DAFM.
- Lean Transform is directed at the 42 large companies which account for 72% of exports. Initial savings of on average of 5.85% of sales have been reported from the 6 companies which have completed the programme.
- Lean Start and Lean Plus programmes, tailored for the smaller exporting companies have demonstrated annualised cost savings of up to 9%.
- Data from the 100 farms participating in the Teagasc BETTER Farm Programme shows that:
 - dairy income increased per litre and per farm, and milk solids production increased by 40% from 2005 to 2010,
 - gross margins for suckler farms in the BETTER Programme, increased by 46% over the period 2008-2010, whilst they reduced by 7% for the average suckler farm.
- The number of users of the online Teagasc Profit Monitors increased from 2,000 to 3,500, enhancing the competitiveness and sustainability of participating farms.

Green Initiatives

Promoting Sustainability

Thinking GREEN

- Bord Bia has incorporated an objective assessment of sustainability on 32,000 beef farms into its Beef Quality Assurance Scheme (BQAS), believed to be the first of its kind. This resulted from close collaboration with Teagasc who developed the carbon model that led to accreditation by The Carbon Trust of a carbon footprint calculation for Irish beef production.
- DAFM, in collaboration with the Department of Environment, Community and Local Government and the EPA, secured an extension of the Nitrates derogation to 2013, on foot of the satisfactory outcome of the 1st Nitrate Action Programme (NAP) and agreement on an enhanced 2nd NAP.
- Industry stakeholders have adopted strategies to boost the eco credentials of over 4,000 milk suppliers in facilitate the extension of the carbon model to the dairy sector in 2012.
- Ireland remains a leading producer of organic farmed salmon while over 70% of Irish pelagic fish are certified by the Marine Stewardship Council indicating fully sustainable stocks.
- Teagasc has produced the first high resolution national land cover and habitat map of Ireland.
- Teagasc has recently commissioned the first biomass-fuelled CHP plant in the country.

- A unique on-farm  **Agricultural Catchment Programme** is operated by Teagasc on behalf of DAFM to evaluate the efficacy of environmental controls and waste investment programmes at farm level.
- Bord Bia has run a media campaign to promote the positive benefits of including the “Sustainability Survey” in the Beef & Lamb Quality Assurance Scheme audits for the 32,000 members.
- Work on the development of our image as a low carbon, ‘green’ food producer has been undertaken by Bord Bia in preparation for the Brand Ireland concept.
- Ireland is a founder member of the Global Research Alliance on Greenhouse Gases which focuses on knowledge sharing and practical farm level greenhouse gas mitigation technologies. The Minister recently signed the Charter and participated in the formal launch of the Alliance in Rome.
- A recent EU study showed that using a full life cycle approach, Ireland’s extensive grass based systems produces the lowest GHG emissions in the EU for dairy animals and 5th lowest for beef.
- DAFM in cooperation with DECLG is working within the UN framework negotiations on climate change, and within the EU, for recognition of the unique challenge facing the agriculture sector in simultaneously meeting global targets on food production and on GHG emissions.

Capacity Building

Growth

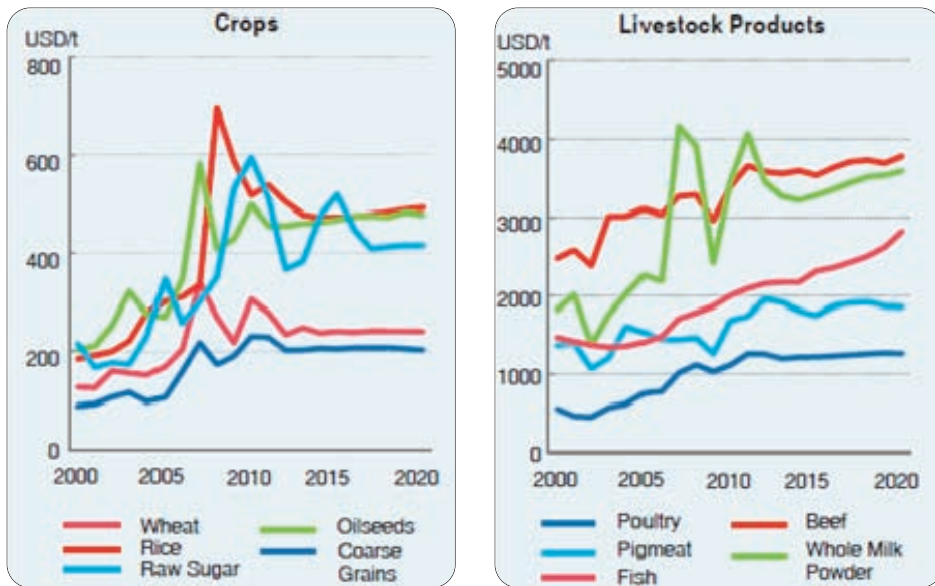
Achieving Growth

- Returns to date from Marketplace 2010 indicate that sales of €12.6 m were achieved from this event which specialises in pre-organised meetings between Irish companies and national and international buyers.
- Teagasc collaborated with industry partners to establish the **Greenfield Dairy Farm**. This project is designed to demonstrate profitable and sustainable dairy farming in the context of the anticipated milk expansion.
- Global sectoral teams have been established by EI in partnership with Bord Bia, Teagasc and BIM to drive export growth agendas in 7 value-added sectors (Pet Foods, Beverages, Frozen Foods, Specialised Bakery, Seafood, Dairy and Snacks / Confectionary). These cross agency teams are working to bring new thinking and greater collaboration in support of these key sub sectors.

- Agri-food exports reached €7.88 billion in 2010, an increase of 11% from 2009 with the prospects for the remainder of 2011 remaining broadly positive.
- With EI support and the collaboration of the Department and Teagasc, a leading global Infant milk producer announced a €50m investment programme at its manufacturing facility. The expansion will treble capacity to 100,000 tonnes annually with 98% of its output exported to over 60 countries.
- 158 jobs are to be created in the seafood sector by 2014, through the expansion of 18 seafood processing companies, investing €7.4m and approved for grant aid by BIM.
- A pilot jobs initiative has been launched in Killybegs, which the fisheries sector plays a significant part. It is anticipated that this will create 250 jobs by 2014.
- 2010 showed a continuation of the strong export performance of the drinks industry with overall drinks exports increasing by 8%, including whiskey at 23%, cream liquers 10% and beer 16%.

3 Milestones for Success

Price Forecasts for Major Commodities



FAO/OECD Outlook 2011-2020

Over the past year considerable momentum has been generated around Food Harvest 2020, as shown in Section 2 above.

A consistent policy vision has emerged on the value of the agri-food and fishing sector to the economy, as illustrated in, the Programme for Government, Food Harvest 2020, the Trade Tourism and Investment Strategy, the Food Tourism Implementation Framework Strategy, Delivering on the Potential of Irish Seafood and Pathways for Growth. A consistent theme of these documents is the central role which this indigenous sector must play in the national export-led recovery.

Just as important, is the renewed sense of confidence and optimism within the sector and the appreciable buy-in from industry leaders to the vision for smart green growth contained in Food Harvest 2020.

However it is essential to avoid complacency with regard to the challenges ahead and to recognise that favourable global market conditions have underpinned enhanced export performance over the past year. While the FAO-OECD Outlook indicates that the global agricultural outlook for the current decade is generally positive, continued price and currency volatility and higher input costs are likely to present considerable challenges.

The future growth of the sector will be influenced by developments in the global economy as well as by the outcome of CAP and international trade policy negotiations.

Within this global context, it is necessary to set out some strategic **milestones for success** to ensure that the FH 2020 targets are achieved. On the following pages, **the key enablers** necessary to sustain and drive progress are identified, as well as the **interim milestones** and **steps** needed to achieve success.

Key Enablers

Improving Competitiveness

While the general improvement in relative competitiveness since 2008, as reported by Forfas, has been encouraging, further progress is necessary, particularly on energy and waste costs. At farm and industry level, improved competitiveness across all market segments is vital through improved productivity, increased scale, enhanced skills and knowledge transfer.

Favourable Policy Environment

At EU level, the major challenges facing the Department are to negotiate an appropriate CAP policy and EU budget framework post 2013 for the delivery of Food Harvest 2020.

Greater Collaboration/Coopetition

There have been successful examples of improved collaboration or coopetition over the past year but greater collaborative engagement amongst key players would deliver substantial dividends. Greater openness to new ways of working together is needed, if the sector is to achieve its full development potential.

Confidence and Dynamism

A tangible sense of optimism and self belief has been evident throughout the sector over the past year. The high calibre of recent entrants at farm and industry level, is another particularly positive and welcome development. These provide a positive environment for further investment and expansion.

Driving Implementation

The High Level implementation Committee will continue to drive the State response to implementation of FH2020. It is now setting quarterly targets for State action and will seek regular reports of private sector action. It will also review and revise the strategy in the light of experience. In that context, it is examining the report of the Beef Activation Group including their proposal that the FH2020 output value target for beef should be raised. It will continue to serve as a clearing house for specific difficulties or more complex challenges that may arise.

Sustainability

To fully capitalise on available market opportunities, Irish food production must operate to the highest environmental standards and ensure that our sustainability credentials are verified by robust scientific evidence. The development of an effective Brand Ireland is dependant on these being achieved.

Targeting State Support

All available State funding will be targeted at priority areas to support the Food Harvest strategy. This will be particularly important in the context of significantly reduced exchequer resources over the next few years.

Industry Leadership

Continued leadership from industry players remains essential particularly around the challenges of major restructuring and reconfiguration of processing capacity. Increasing industry expenditure on R+D and product and process innovation will be critical to the achievement of the ambitious FH2020 growth targets. Central to the success of a Brand Ireland concept will be industry buy-in to a common brand proposition.

Key Actions for the coming year

The following key initiatives must be significantly progressed by July 2012.

Primary

- Maximise profitable dairy output at farm level, within quota limits, and ensure a managed and sustainable build-up of dairy cows and replacements in the lead up to 2015.
- Implement a national voluntary programme for BVD, Johnes disease and Mastitis/SCC control.
- Following the pilot CellCheck programme, complete a full national CellCheck roll out in 2012.
- Implement the new dairy farm management course and other growth-focused training programmes.
- At farm level, enhance efficiency and knowledge transfer by increasing participation in Discussion Groups to 8,000 and achieving 5,000 Profit Monitors.
- ICBF to further develop genomic selection for beef and dairy cattle as part of a new beef breeding scheme and the redevelopment of the dairy cattle breeding programme.
- Introduce a further scheme for new entrants to dairy farming, as recommended by the Dairy Expansion Activation Group.
- Implement a communication strategy to encourage technology uptake and improved productivity, within quota constraints, for dairy farmers.
- Include a tissue tag as part of the next bovine tag tender and upgrade the animal identification movement system to record them.
- Simplification of CAP measures will be pursued as part of the CAP reform negotiations.

Industry

- Development of dairy industry plans to increase processing capacity to meet increased milk supply.
- Complete a comprehensive strategic assessment of the environmental impacts arising from FH2020 so as to guide future policy and action.
- The meat inspection service will be further streamlined to provide a cost effective service consistent with regulatory requirement and consumer safety and confidence.
- Reach agreement with French vessel owners to land/process in Ireland the equivalent of 2 whitefish vessels per week.
- Achieve licensing of one or more large scale offshore finfish aquaculture sites, located outside Natura 2000 designations.
- Improve industry capability and knowledge dissemination by increased participation in skills programmes to achieve the following 2013 targets- Lean programmes (20 Large, 70 SME), L4G (50 CEO), Strategic Growth Programme (31), Marketing Fellows (28) and Food Graduate Export Programme (15).
- Significantly increase the rate of aquaculture license determinations in compliance with EU Environmental Directives.
- DAFM and DECLG will seek to ensure that Ireland's agriculture and forestry interests are advanced in the revised EU carbon accounting framework in 2012 and at the UNFCCC negotiations in December in 2011.
- 10 further co-opetition projects explored.
- DAFM funded Food Graduate Development Programme will be expanded to include agriculture and forestry.
- The regulatory requirements arising from national and EU legislation will be reviewed with industry stakeholders.

Key Actions for the coming year

Increase value-added

- Increase by €300m the value-added in dairy, beverages, frozen foods, seafood, pet food, specialised bakery and snacks/confectionary.
- Pursue new strategic investments from international companies in the dairy/infant nutritional sector.
- Launch the IDB Dairy Innovation Centre in collaboration with Teagasc to generate a pipeline of branded milk-based consumer products.
- Develop a new research programme in collaboration with the meat industry to increase the value of waste streams in the sector.
- Teagasc will integrate a facility for Dehydration Technology into its existing research programme on 'Smart' dairy ingredients that have built-in functionality for food applications worldwide.

Market expansion

- Attain an agri-food export target of €8,500m
- Pursue euro zone diversification in frozen foods and specialised bakery sector to achieve growth target of €15 million in these markets.
- Facilitate industry to foster new buyer relationships and achieve a €15m. sales target in the first year through Marketplace 2012.
- Launch a new strategic programme designed to expand penetration of the German market, utilising a Brand Ireland approach, for Irish beef.
- Develop an awareness programme to raise the profile of Ireland in the Chinese market as a safe, sustainable and nutritious source of dairy foods.
- Implement a private label development programme focused on increasing sales of Irish food and drink to the Continental EU retail sector.

Innovation

- Actively pursue the establishment of 2 new industry-led research centres.
- Develop and roll out an industry-led carbon model for the dairy sector, based on the Bord Bia/Teagasc beef carbon footprint model.
- Build on Ireland's success in obtaining funding under EU Research Framework Programme (FP).
- Awards will be made under the DAFM research call on FH 2020 priorities.
- Ensure that research on the agri-food and bio-economy sectors feature in the National Research Prioritisation Plan for Investment in Government Research.
- The Agri-Research Expert Advisory (AREA) Group will develop a Strategic Research Agenda for agricultural production based research.
- The Food Research Expert Advisory (FREA) Group will finalise the National Food Research and Innovation Plan.
- Teagasc and UCD will launch a new Alliance in Agricultural Research, Education and Innovation.
- Teagasc will research the eating quality of bull beef to ensure maximum return from this expanding sector.



Interim milestones

Primary Output

2015 Milestone

Increase value of primary output by €700m

2013 Milestone

Increase value of primary output by € 300m

Restoration of Annex 1 habitats/species to favourable conservation status

Measurable improvements in GHG emissions per unit of output for beef

Reduced prevalence of herds with BVD persistently infected animals (PIs)

Animal breeding programmes to contribute to increased annual genetic gain from €15 to €18 in dairy EBI and €5 to €10 in beef SBV

10,000 farmer participating in discussion groups

5,000 profit monitors completed annually

Achieve milk solids of 359kg per cow

5,000 Profit Monitors completed annually

Expand the BETTER Farm Sheep Programme to 10 sheep flocks

Expand the Beef BETTER Farm Programme to non-suckling systems

Two-year specialised farm manager training option delivered

9,000 farmers participating in discussion groups

New sheep demonstration farm established

Key Enablers

- Improving Competitiveness, Knowledge Transfer and Restructuring,
- Confidence and Dynamism,
- Targeted State Support.

Agreed Vision

Stakeholder Buy-in

Global Growth Potential

Coordinated State Response



Value-added sector (exc. Seafood)

2013 Milestone
Increase value-added by €500m

2015 Milestone
Increase value-added by €1bn

Dairy industry investment in milk powder facilities

New cheeses developed through Teagasc/IDB partnership

New FDI investment commitments by the infant formula sector

Progress 2 industry led research centres

Launch new Irish drinks products in the US following consumer testing

PAS 2050 accreditation achieved for major primary products

New research facility for Dehydration Technology and Smart Ingredients completed

Increase value of waste streams in meat industry

Significant progress made in new cheeses and other food products through Teagasc/IDB partnership

Build greater capacity in product development in the drinks industry

New Smart ingredients output from Teagasc Dehydration and Smart Ingredient facility

Stream of new products with functional properties from FHI and other initiatives

Key Enablers

- Improving Competitiveness,
- Industry Leadership,
- Targeted State Support.

Agreed Vision

Stakeholder Buy-in

Global Growth Potential

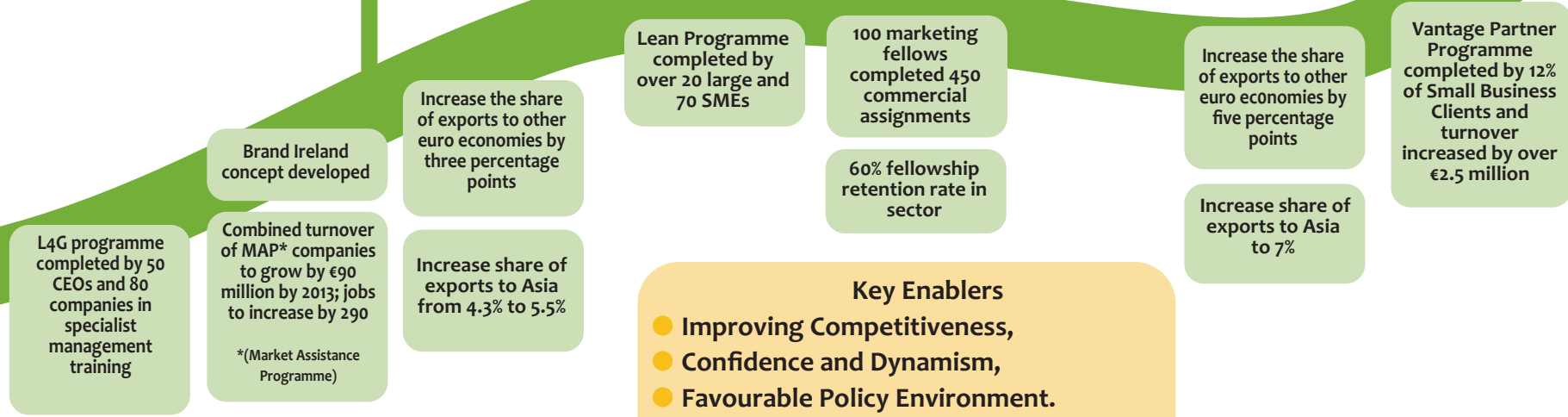
Coordinated State Response



EXPORTS

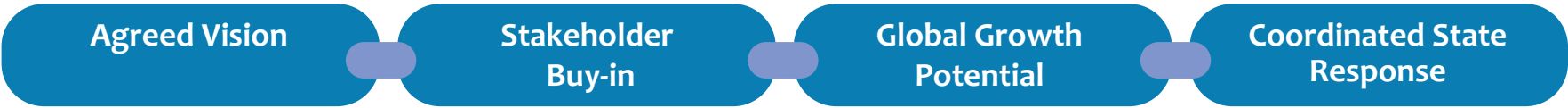
2013 Milestone
Achieve export target of €9bn

2015 Milestone
Achieve export target of €10bn

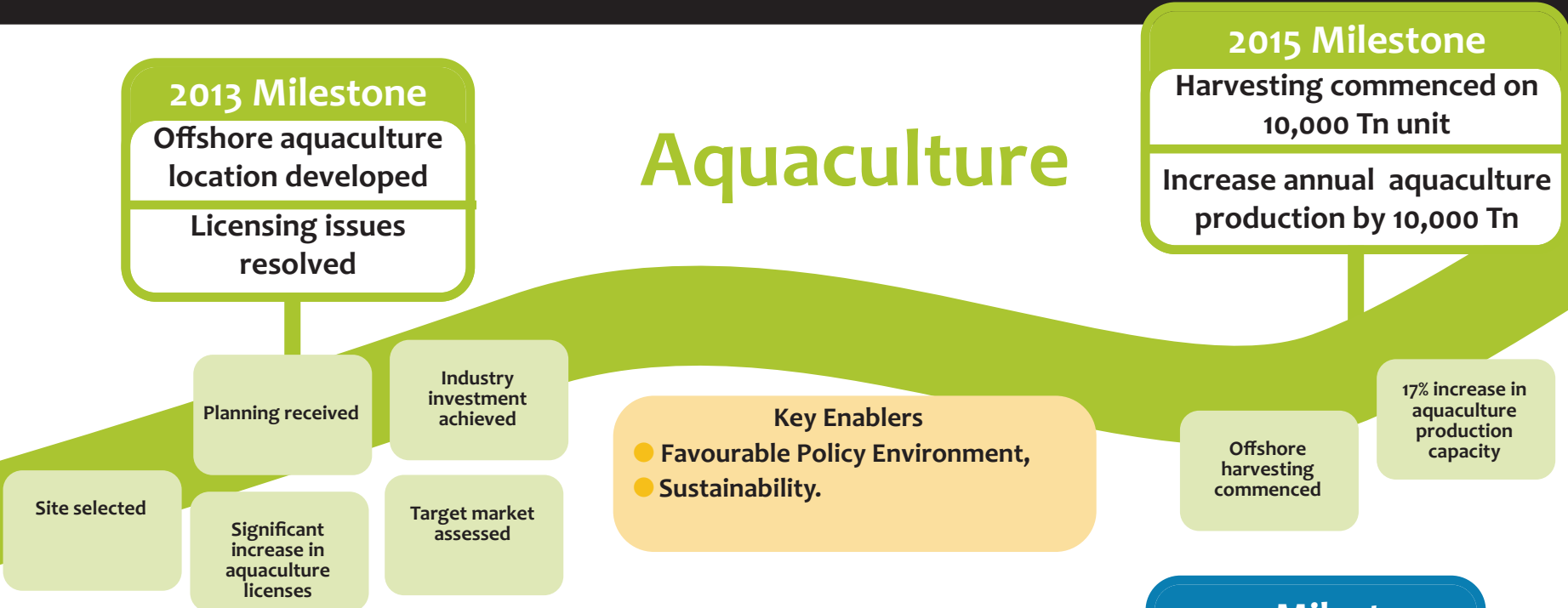


Key Enablers

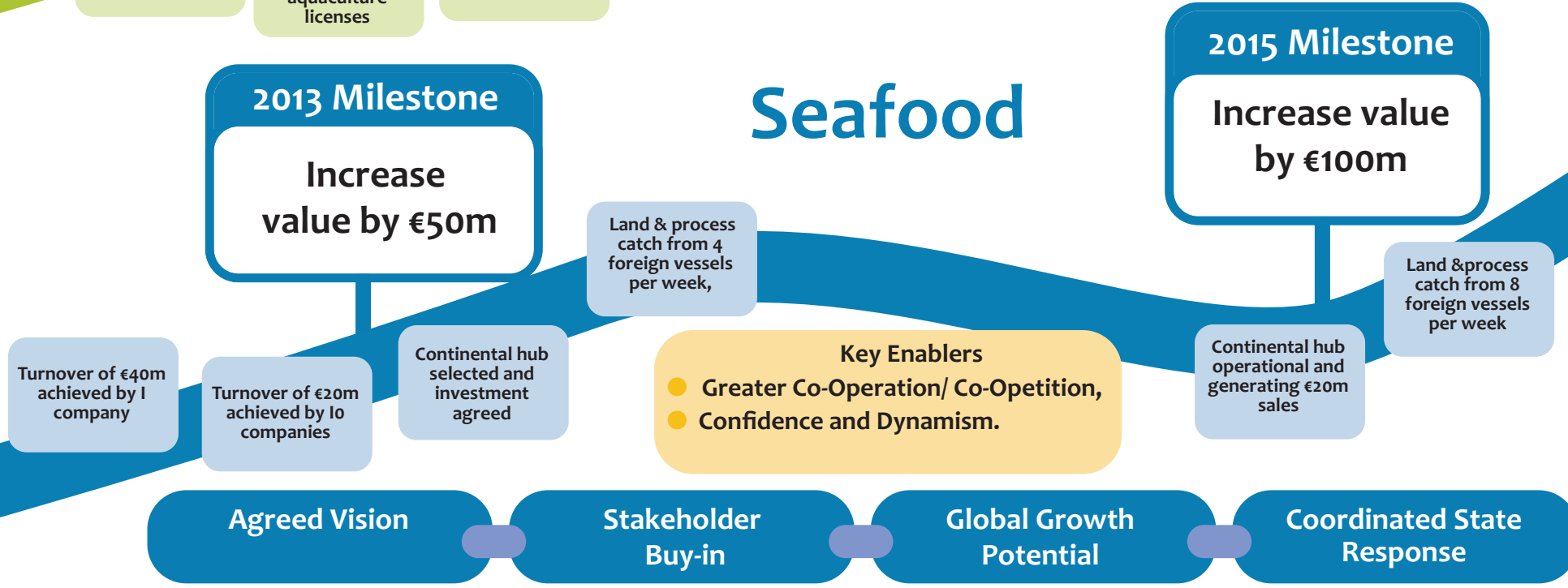
- Improving Competitiveness,
- Confidence and Dynamism,
- Favourable Policy Environment.



Aquaculture



Seafood



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