WICKLOW/CARLOW/WEXFORD REGIONAL ANNUAL REVIEW 2021

84.000ha

HECTARES OF TILLAGE

SIGNPOST FARMS

DAIRY 3 BEEF

SHEEP 3 TILLAGE

Farmer Clients

Welcome to th

Welcome to the first edition of the Wicklow/Carlow/Wexford Annual Regional Review. This Review outlines the main features of agriculture and land use in the Region and summarises the resources and activities of our advisory and education services in 2021. As reported in the Teagasc Rural Economy Summary Review of 2021 average margins on dairy, sheep and tillage farms, were up substantially compared to 2020 despite rising costs, due to higher prices for farm outputs. Average beef margins were up slightly



while pig margins were down significantly. Overall it was estimated that farm income would be up approximately 20% in 2021 compared to 2020. Against a backdrop of already increasing prices, unfortunately, the situation for farming in 2022 is very uncertain given the instability created by the war in Ukraine.

I would like to acknowledge the hard work of staff in the Region and thank our clients and all our stakeholders for their ongoing support. In particular I wish to acknowledge the support of Glanbia Ireland and Boortmalt, both partners with Teagasc in joint programmes operating across the region and all the other stakeholders – farm organisations, local agri-businesses, local authorities, government departments, state bodies and others too numerous to mention.

I hope this document gives some insight into farming and Teagasc advisory and education work in Wicklow, Carlow and Wexford and helps promote continued and closer engagement between Teagasc and the agricultural sector in the Region.

> Ger Shortle Wicklow/Carlow/Wexford Regional Manager



4,050

131,513 316,000 DAIRY COWS BREEDING EWES

> 62,634 SUCKLER COWS

SIGNPOST

8,509

FARMS

Total

Farms

Average Farm Size

Average Age

of farmers



TEAGASC WICKLOW/CARLOW/ WEXFORD OFFICES

The map below shows our five Advisory Offices: Oak Park, Tinahely, Gorey, Enniscorthy and Johnstown Castle. We also operate regular clinics for clients in Rathnew and New Ross. Also shown are the locations of the 9 Signpost farms in the Region



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Co Carlow.

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9183555

TINAHELY

Coolruss.

Tinahely,

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CKLOW/CARLOW/WEXFORD REGIONAL ANNUAL REVIEW 2021

Farming in the Region -Census of Agriculture 2020 and ICBF Data 2021

The census of agriculture 2020 indicates that since the previous census of 2010, the number of farms in the Region has fallen from 8,622 to 8,509, a decrease of 1.3%.

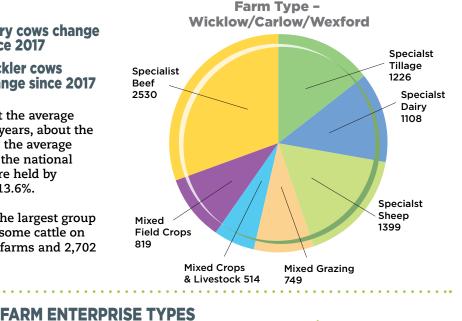
Cattle numbers have changed significantly and ICBF data for the five years from 2017 to 2021 shows that total cattle numbers fell by 3.5% in the Region, whereas nationally they increased by 10.3%. Suckler cows fell 18% compared to a fall of 12% nationally while dairy cows increased by 19% versus a national increase of 12%, highlighting the rapid expansion of milk production in the region. CSO census figures for 2017 versus 2020 show a drop of 12% in breeding ewe numbers for the region compared to no change nationally over that time.

Average
Age56.6 Yrs19%Dairy cows change
since 2017Average
farm Size41.5.Ha-18%Suckler cows
change since 2017

The 2020 Agricultural Census shows that the average age of farm holders in the region is 56.6 years, about the same as the national average of 57 while the average size of farm at 41.5ha is 24% larger than the national average, which is 33.4ha. 13% of farms are held by women, close to the national average of 13.6%.

In 2020 specialist cattle farms made up the largest group at 2,530 and 5,372 or 63% of farms have some cattle on them. There were 1,226 specialist tillage farms and 2,702 farms or 32% had some tillage. Nationally only 5% of farms have some tillage and the farms in this region make up 43% of all such farms in the country. This indicates clearly that mixed farming continues to be a significant activity in the region compared to elsewhere in Ireland.

Census data shows that the area of all tillage crops in the Region increased from 82,000ha to 88,000ha in 2020. During this period cereals increased by 4% while other tillage crops increased by 19%. In 2021 the tillage area dropped back to 84,000ha.The number of specialist tillage farms in the region has increased between 2010 and 2020 from 1,167 to 1,226 or 55, whereas nationally such farms have declined by 5%. This underlines the importance of the tillage sector for the region.











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Dairy Enterprise

There were 1,271 dairy farms in this region in 2020 according to the Census of Agriculture or 7% of the 17,495 dairy farms in the country. 2021 ICBF data shows that there were 131,513 dairy cows on these farms giving an average herd size of 103 cows compared to a herd size of 83 nationally.

ICFB data from 2017 shows that total dairy cow numbers in the region increased 19% in the five years up to 2021. The national increase in the same period was 12%, so growth in the dairy sector was considerably stronger than for the rest of the country.





Hannah, John and Niamh Doyle, Ballindaggin, Enniscorthy, new entrants to dairying.

2021 was a good year for dairying. The national average dairy farm income is estimated at €94,000, a 28% increase on the 2020 average. This increase was underpinned by a number of factors including generally good grass growing conditions, increased milk yield per cow and an increase in the price paid for milk. However, some increases in production costs were also observed including feed and fertiliser costs, which increased by 16% and 10% respectively.

> Farm Walk on Pollard's Farm Ballywilliam, New Ross

Farm Walk on Shane Ryan's, New Ross









We would like to acknowledge the valuable information provided by and co-operation of:

• Census of Agriculture 2020 CSO Office

> Teagasc National Farm Survey
> DAFM
> ICBF

Derogation Course in Johnstown Castle

Beef Enterprise

This is an important enterprise in the Region with 30% of farms being specialist beef farms and over half of farmers in the Region having some beef. There were 3,418 suckler farmers in the region in 2020 with 62,634 suckler cows at the end of 2021.

There are nine Drystock advisors and three Soils and Environment advisors providing an advisory service to beef farmers in the Region.

Nationally 2021 was a year of rising beef and mart prices but also increasing costs. Weanling and store prices rose by an average of 8% and 9% per Kg respectively with beef carcass prices 12% higher than in 2020. Total costs rose by an average of 8% due especially to increases in feed (+20%), fertiliser (+7%) and energy costs (+16%).



Michael Carrol, Bagenalstown with Drystock Advisors Marianne Mulhall and Eoin Woulfe

Gross Margin per hectare on cattle rearing farms rose by 5% with a very small increase in net margin per hectare. Gross margin per hectare on cattle finishing farms rose by 10% with a modest increase in net margin per ha (+ ϵ 72). Total numbers of cattle slaughtered dropped by approximately 90,000 head in 2021 and live exports reduced by over 12,000 head. The number of calves born to the suckler herd dropped by 1% compared to 2020.



62,634 SUCKLER COWS AND 3,418 FARMS 4,500+ FARMS WITH A BEEF DISCUSSION CROUPS 12 DRY STOCK ADVISORS 1 DAIRY BEEF SOO FARM 2 FUTURE BEEF FARMS

> Farm Walk at Paddy O'Briens Ramsgrange, Wexford

Richard and Tim Sheil Bunclody.

Sheep Enterprise

Sheep production is a very significant enterprise in the Region. According to the 2020 Census of Agriculture, there were 316,000 breeding ewes in the region on 3,087 farms – that is 36% of farms.

About 45% of these farms, or 1,399, were specialist sheep farms, while the rest had another main enterprise.

Irish lamb prices are estimated to have increased by 30% in 2021 compared to 2020, according to National Farm Survey (NFS) data, with record high prices being maintained right throughout the year. However, total costs also increased by around 20% resulting in an estimated 26% average increase in gross margin on mid-season lowland sheep systems.



Denis Brennan Ballyhogue







Drystock Advisor James Doran and Partick Kehoe, Bunclody

The cost of concentrates increased by 40% in 2021 accounting for the largest part of the cost increase. The indications are that lamb prices are set to remain strong, albeit with a modest price decrease of an estimated 5% below the record 2021 levels.



Tillage Enterprises

The region leads the country in tillage production. The 2020 Agricultural Census recorded 2,702 farms in the region with tillage enterprises and 1,226 specialist tillage farms. In 2021, there were 84,000ha of tillage in the region making up 26% of the national total.

This was down slightly on the 2020 figure of 88,000ha, representing a drop of 4.5%, however the national area declined by over 8.1%.

The 2020 Agricultural Census shows that barley is the main tillage crop in the region making up 61% of the tillage area that year. Malting barley is a very important crop in this region, with half of the national tonnage produced here. Currently approximately 12,500ha of malting barley is grown each year or 23% of the total barley area in the region.

The area of wheat and oats grown is much smaller than the barley area, but still very significant, at 9.5% and 7.1% of the region's tillage area respectively. There are a wide range of other crops that make up the remainder of the tillage area, of these maize has the largest area at 1% with fodder beet, oil seed rape and potatoes each having about 0.5%. Tillage Advisor, Ciaran Hickey



6% OF NATIONAL TILLAGE AREA 702 FARMS WITH TILLAGE

ENTERPRISE

O PRODUCTION

TLLLAGE ADVISORS

SPECIALIST TILLAGE FARMS

Forestry

In the region, the total forestry cover, including both privately owned and Coillte owned, accounts for 11% of the land area or 59,285 Ha in 2017 (all figures for 2017*). 775 farmers in the region received a total of €3,945,942 in forest premium payments in 2017. The total volume of timber harvested in the region is estimated at 512,000m³ overbark of which 162,000m³ was harvested by private forest owners.

The value of timber sold by private owners in the region in 2017 is estimated to be in the region of $\in 6,708,000$. 324 hectares were planted in the regionin 2017 and 23% of all species planted during that year were broadleaves. Total employment in the forestry sector in the region is estimated at 1,150 people.

Wicklow is by far the county with the largest forestry sector in the region with over 60% of the forestry area and an estimated 760 people employed in the sector. Wicklow had 85% of the private sales value for the region in 2017 but only 36% of the premium payments indicating the greater maturity of private forestry plantations in the county compared to those in Wexford and Carlow.

The region is home to many major forest sector industries providing much employment. Sawmills such as Murray's in Ballon, Co Carlow and Woodfab in Aughrim, Wicklow provide a market for much of the timber harvested in the region. Two major forest nurseries are also in the region, the Coillte nursery in Ballintemple, Carlow and None So Hardy nurseries with locations in Shillelagh and Ballymurn, near Enniscorthy.



The forest owners in the region are further served by many foresters based in the area along with forest owner groups who facilitate owners to meet to exchange ideas and coordinate timber sales. For example, the Irish Wood producers work to coordinate forest management in the region adding value to low value forestry thinnings by creating local supply chains of wood chip into heat demanders in the region.

During 2021, the Teagasc Forestry Development Department was very active and continued to provide advisory, training and educational support to new and existing forest owners through one-to-one advice and events such as workshops, live broadcasts,

timber marketing and wood use webinars, forest owner group support, on-site events and forestry input to agricultural education courses. An extensive range of events planned for 2022 can be viewed on the forestry section of the Teagasc website.

WICKLOW 18% FOREST COVER



WEXFORD **6.2%** FOREST COVER

Horticulture

Horticulture is a significant activity in the region with 695ha of horticultural crops on BPS applications in 2021. The demand for horticultural produce including food and plant material has never been higher. Horticulture is one of the most carbon efficient sectors and expanding the sector could contribute towards achieving carbon neutrality by 2050.

In descending order the more significant crops by area were:		
Crop	Area (Ha)	
Carrots	259	
Lettuce	92	
Brassicas*	82	
Orchard	47	
Parsnips	32	
Strawberries	30	
Pumpkins	29	
Onions	21	
Nursery	20	
Blackcurrants	19	
Hemp for food use	17	

*Cabbage, broccoli, brussels sprouts, cauliflowers.

New national and EU policy documents including the Programme for Government, Food Vision 2030, Ag Climatise, EU Farm to Fork and Biodiversity strategies set ambitious targets for reducing the impact of agriculture on the environment and highlight diversification as an option to mitigate climate change, potentially providing opportunities for horticulture. A key deliverable of Food Vision 2030 is to develop a roadmap for the horticulture sector in Ireland and Teagasc is contributing to its development.



The sector faces many challenges, particularly regarding increased input costs, poor labour availability and disruption to supply chains. Considerable volatility remains as primary producers try to plan and manage cash flows. In an environment where cost planning is difficult, risk is increasing very significantly for primary producers. To support the sector the Teagasc horticultural programme focusses on applied technology adoption and identifying the best practical applications of research knowledge in order to enhance the efficiencies and capabilities of growers and enterprises in this sector. Focus continues on labour-saving technologies, evolving production systems to limit the requirements for crop protection products, and increasing economic and environmental sustainability.



Pigs

The pig sector is the third most important agricultural enterprise in Ireland after milk and beef, accounting for 8% of Gross Agricultural Output and the region has a significant presence of pig farming with 7% of the breeding pigs in the country.

There are the equivalent of 10,200 sows in the region on commercial pig farms with more than 20 sows and 50 finisher pigs. These are on 20 farms out of a national total of 280 commercial pig farms in the country. The herd size in the region works out at 510 sows per farm, which is somewhat lower than the national average herd size of 700 sows

The sector enjoyed a buoyant period of profitability in 2019 and 2020, with export value reaching almost €1 billion in 2020. Unfortunately, higher feed ingredient prices and a lower international pigmeat demand reduced the sector's profitability in 2021. The annual average feed cost in 2021 was 118 cent per kg dead weight. That is 9 percent higher than the 2020 and 5-year average of 109 cent per kg dead weight. At 159 cent per kg dead weight, the 2021 Irish pig price was significantly lower than the 174 cent per kg average for 2020.The average Irish slaughter weight continued to trend upward in 2021, with an estimated average sale weight of 116 kg. This is an increase of 13 kg since 2010.

The key immediate challenge for pig producers is lack of profitability and there are significant health and welfare challenges facing the sector too.



20 PIG FARMS IN THE REGION 510 AVERAGE HERD SIZE 10,200 SOWS

AVERAGE FEED COST 2021 118C PER KG DEAD WEIGHT /5 YEAR AVERAGE IS 109C PER KG DEAD WEIGHT /2021 MARGIN OVER FEED WAS 41C PER KG DEAD WEIGHT

Sustainable Farming

Increasing the sustainability of farming is a priority for Teagasc in the Wickow/Carlow/Wexford Region. To be truly sustainable farms have to be economically viable, environmentally sound and provide a career and lifestyle that is attractive to future generations.

We are striving to address the need to make farming more sustainable under these three pillars - economic, environmental and social. This presents a very broad set of challenges for farmers and for their advisors and educators. Traditionally our advisory and education programmes addressed the economic and social challenges and increasingly they are addressing the environmental challenges too, through innovative programmes like Signpost and ASSAP and supporting environmental schemes.

Climate Change

Climate change is one of the biggest challenges facing farmers over the next decade. There is a lot of negative commentary about farming in the media as agriculture accounts for 36% of GHG emissions in Ireland. (Fig.1) Ambitious targets have been set for Irish Agriculture between now and 2030 to reduce GHG emissions by between 22-30%. Teagasc have designed a roadmap to help achieve this target but it requires immediate buy in from farmers. This is the purpose of the Signpost Programme - to identify and demonstrate to farmers locally, what measures farmers need to adopt now to help Irish Agriculture reach these targets.



The Signpost Programme

The Signpost programme is a multi-annual campaign to lead climate action by all Irish farmers, and achieve early progress in reducing gaseous emissions from Irish agriculture while also improving water quality, maintaining and in some cases improving biodiversity, reducing costs and creating more profitable and sustainable farming enterprises

It will also act as a test bed for on-farm carbon sequestration measurements so that this can, in time, be taken into account by the EPA in the national Greenhouse Gas inventory. It is a collaborative programme, led by Teagasc and includes all relevant industry partners and state bodies. Each Signpost Farm is supported by a local advisor as well as the national Signpost team.

national Signpost team.

There are currently nine Signpost Farms in the region:

John Crowley Crosswinds Farm Ltd Ferns, Enniscorthy	Conventional Tillage
Don Somers, Munroe, Enniscorthy, Co Wexford	Conventional Tillage
Gavin Tully Clonhenritte, Camolin, Enniscorthy	Organic Tillage
Sam Pierce	Suckler Beef
Parklands House Bannow, Co Wexford	with sheep/tillage
John Pringle Sunny Hill Farm, Aughrim, Co Wicklow	Suckler Beef
Shane Cranny Myshal, Co Carlow	Dairy Calf-to-beef
Brian Keane Davidstown, Enniscorthy, Co Wexford	Sheep
Shay Ryan Rochestown, New Ross,Co Wexford	Dairy
Kevin Murphy Corriganeagh, Gorey, Wexford	Dairy

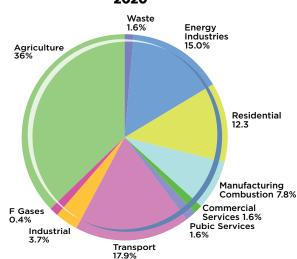


Figure 1: Profile of GHG Emissions 2020

Water Quality

Maintaining and improving water quality is a national priority and a collaborative programme has been developed to achieve this. ASSAP, the Agricultural Sustainability Support and Advisory Programme, provides free and confidential advice under this programme.

There are two dedicated ASSAP agricultural advisors in this region, working from the Teagasc offices in Johnstown Castle and Oak Park. They work mainly in the Priority Areas for Action (PAAs) which have been selected for a campaign aimed at improving water quality. There are currently 15 PAAs in the region. Risks to water in the PAAs come from different sectors farming, domestic, industrial, municipal and forestry. The main farming risks are from nitrates, phosphorus, sediment, pesticides and microbial contamination. The main risk to water, in this region, is from nitrates, given the free-draining soil and the relatively intensive farming. However, phosphorus loss to water, on heavier soils, can be a risk too, as well as management and application of manures, effluents, fertilisers and pesticides. The ASSAP advisors' job is to help farmers to reduce the risk to water and to raise awareness about the importance of minimising risk to water.





Education

There is a strong tradition of locally delivered education courses in Wicklow, Carlow and Wexford and each autumn a new Part-time Green Cert Course for adults starts in the region.

The class size is approximately 25 and students' progress through Levels 5 and 6 to achieve the Green Cert. In 2020, an innovative blended and shortened version of the course was introduced. This course is delivered over 18 months compared to the traditional three years. Classes alternate between online and local education centres every second week during the academic year with practical sessions in Kildalton Agricultural College and on-farm session on local Benchmark Farms.

Benefits of Green Cert

- · An excellent training for a life in farming
- Relief on Inheritance Tax and Gift Tax
- Higher grant rates on machinery and buildings
- Stamp Duty Relief on land transfers
- Young Farmers Scheme extra payments
- Entitlement allocations from the National Reserve



Scheme and Payments

The total value of schemes and payments to the region in 2021 was €129,630,840.

Basic Payments Scheme (BPS) payments made up 76.6% of this (€99.4m) while Areas of Natural Constraint (ANC) payments came to 7.4% (€9.6m). Under environmental schemes GLAS and REAP payments combined were worth 5.9% of all payments to the region (€7.7m).

Overall, the region received 7.7% of the total national payments under all schemes and 8.7% of BPS payments. Payments to the region as a proportion of national payments varied greatly with approximately 30% of the national figure for Protein Aid and Straw Incorporation Measure payments compared with 4% of ANC and 2.5% of REAP payments. These figures reflect the nature of farming in the region with the high proportion of tillage and a traditionally high level of intensity.

Farm Management

The Farm Management Department of Teagasc supports advisors and education officers in delivering specific services for their clients mainly focussing on:

- Financial Efficiency of the farm business using the Teagasc Profit Monitor analysis.
- Farm Succession
- Restructuring/Consolidation for Capital Gains Tax Reliefs
- Certification of Business Plans for Government Tax reliefs
- Basic Payment Applications
- Farm Planning
- Collaborative Farming support and promotion on collaborative farming methods
- TAMS Applications (Targeted Agricultural Modernisation Scheme)

Rural Development

Options

Alternative Enterprise Events and Options courses are regularly offered in the Region. An options advisor is available to help clients investigate the range of enterprises that may provide opportunities to further develop their farm.

Equine

The equine advisory team provides support across breeding/production, husbandry, sustainability and income generation, all of which were covered in the Let's Talk Equine Webinar series on the first Tuesday of the month. The specialist team is also now supported by an equine contact advisor in the region.

Organic Farming

At present in Ireland, there is approximately 90,000 hectares under organic production, which represents 2% of the agricultural area. The current Programme for Government has a target to align Ireland's organic land area with that of the current EU average of 7.5% approx. There are currently 1,968 organic farmers participating in the DAFM Organic Farming Scheme (OFS) of which 104 are in Wicklow, Carlow and Wexford, that is, approximately 5% of all organic producers. They farm 5,510 ha or 6% of the national organic area. Funding for the 2022 Organic Farming Scheme (OFS) is \in 21 million up from the \in 16 million 2021 allocation, allowing for the opening of the OFS for new entrants in 2022.

The region has the only specialist tillage-only organic Signpost Farm in the country which is also a DAFM Organic Demonstration Farm (see Signpost Farms section) and has an advisor dealing with organic advice and training supported by the national organic specialist team.

ORGANIC FARMING IRELAND AGRICULTURAL 104 (11.5%) ORGANIC FARMS



Media and Social Media...

The region has a strong and regular presence in local radio and newspapers as well as social media.

There are regular articles throughout the year in local and national newspapers and regular contributions to local radio farming programmes. The Regional Media Team update our Facebook, Twitter and Instagram accounts regularly and most advisors manage WhatsApp groups with their clients.

Online meetings and webinars became an essential element of our communication efforts with clients and the general farming public during Covid and they remain a very useful channel for getting our messages out to farmers. Short videos are another format that developed rapidly in response to Covid restrictions and all our advisors are now using them as part of their communications output.

Communication Content

Articles Videos **Radio Interviews** Webinars **Social Media Posts** 3/Month 3/month 2/Month 8/vear daily

Communication Media

Regional Webpage Social Media Local Radio Local Press Puca Whatsapp

Updated Weekly Dailv Weekly Fortnightly 1-2 Texts per Week **Regular updates**







ARTICLES IN LOCAL AND NATIONAL **NEWSPAPERS** & MAGAZINES





The benefits of being a Teagasc client

Clients have access to Teagasc advisors by phone, arranged on-farm visits, discussion groups etc. Teagasc regional offices are also in regular



contact with clients via text and other media about deadlines and other urgent messages.

Teagasc clients receive technical newsletters, tailored to their enterprise mix, ten times per year through the post. In addition the Teagasc magazine Today's Farm is also delivered to clients six times per year.

The advice provided by Teagasc regional staff is underpinned by four research programmes

- Crops, Environment and Land Use
- Food
- Rural Economy and Development
- Animal and Grassland Research and Innovation

The Teagasc annual research portfolio comprises some 300 research projects, carried out by 500 scientific and technical staff in our research centres throughout Ireland. In addition to the education officers in each region Teagasc education offers a wide range of agricultural, horticultural, equine and other courses at four Teagasc colleges and works closely with three private colleges.

How do you become a **Teagasc client?**

Contact your local Teagasc office

