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# Achievements 2025

Progress with innovation, sustainability and technical performance in the agrifood sector



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## Fostering **RESPECT**

**We foster a culture of respect where we listen and take action to help everyone, prioritise inclusion, recognise the strength in our differences and promote positive well-being**



Being respectful to each other, clients, students, collaborators, stakeholders, and the public at large is a given.



Being valued, supported and empowered.



Having empathy, and ensuring everyone is being actively listened to.



Fostering trust and collaboration, building strong relationships and enhancing our performance.



Promoting health and well-being, and encouraging people to disconnect.



## Striving for **EXCELLENCE**

**We endeavor to consistently deliver excellence & value for money**



Delivering high standard quality independent services.



Encouraging creativity, innovation and continuous improvement.



Adopting a culture of support and working together.



Recognising the value and contribution of others.



Challenging ourselves and others to excel.



## Acting with **INTEGRITY**

**We deliver our work with integrity for the common good, and we are accountable for our actions and decisions**



Being transparent, accountable, conscientious and answerable for our decisions.



Being ethical and fostering an environment of transparency and trust.



Providing a safe space for everybody to constructively express their thoughts and concerns within and outside the organisation.



Questioning, challenging and evaluating our actions to provide robust solutions that positively impact society.



Promoting the common good for the welfare and benefit of all.

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# Foreword

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**PROFESSOR FRANK O'MARA,  
TEAGASC DIRECTOR.**

Achievements 2025 sets out progress with innovation, sustainability and technical performance in the agrifood sector. It also includes estimates of farm incomes as outlined in the Teagasc Outlook 2026 conference in December.

Prices for farm produce and inputs are obviously critical to farm incomes. Good technical performance is also important as it contributes to competitiveness and resilience, and is crucial for profitability and sustainability. Therefore, it is important to review the past year to see where progress is, or is not, being made.

Weather plays a significant role in agricultural productivity and must be kept in mind when interpreting the data. Many of the indicators published here are based on unique Teagasc datasets such as the National Farm Survey (NFS), PastureBase Ireland and NMP online. Many more are based on datasets of organisations such as the CSO, ICBF, DAFM and the EPA, and we are grateful for these data.

The NFS is a rich source of insights on technical performance as well as family farm income, and detailed data for 2025 will be available later in the year in the 2025 NFS Report, the NFS Sustainability Report and the NFS Enterprise Factsheets.

Teagasc research, education and advisory support is focused on supporting farmers to improve the performance indicators included in this report, and while we acknowledge our Teagasc knowledge transfer and research colleagues, we recognise that many other organisations and individuals also play important roles in this regard.

We are grateful for the funding provided mainly by the DAFM, and also funding agencies such as Taighde Éireann - Research Ireland, Enterprise Ireland, the Environmental Protection Agency and, the Horizon Europe programme. Together with funding from farmers via the dairy and pig levies and funding from industry partners, this allows us to do our work.

Finally, I would like to thank our farmer and industry stakeholders for their ongoing support and loyalty, we greatly appreciate it.

# Executive Summary

## Introduction

Favourable weather and positive market price developments provided the basis for a good year in 2025 across much of Irish agriculture. Good weather and higher fertiliser use contributed to grass production increase to 13.2 t DM/ha (11.8 t DM/ha in 2024) across farms with data in PastureBase Ireland. Growing conditions and good weather at sowing and harvesting also led to good crop yields, but falls in prices compared to 2024 led to disappointing incomes on tillage farms. There were also some improvements in soil fertility across soil samples analysed through Teagasc which contribute to improved productivity.

## Climate change and water quality

Agricultural greenhouse gas emissions have declined annually since 2022, reaching a cumulative 4.6% reduction in 2024, relative to the 2018 baseline. Provisional EPA estimates indicate a further 0.6% decrease to the end of Q3 2025. This is mainly driven by lower cattle numbers which were partly offset by increased nitrogen fertiliser use and a decline in the proportion of nitrogen fertiliser that was applied in protected urea products.

The latest EPA Water Quality in Ireland 2019-2024 report showed a further slight decline in surface water quality. However, the report also highlights that in priority areas for action (PAAs) where the ASSAP has been working, the mean phosphorus concentrations in rivers are consistently below (i.e. better quality than) the good status environmental quality standard of 0.035 mg/l. Furthermore, P concentrations are on average 22% lower in PAAs than non PAAs. The Teagasc led Better Farming for Water Campaign, the ASSAP and the Farming for Water EIP are important components of the ongoing work to reduce agriculture's impact on water quality in the coming years.

## Dairy

Milk production increased by 5% in 2025 mainly driven by excellent grass growth and grazing conditions, despite dairy cow numbers falling by 1.5%. After rising each year since 2009, cow numbers have now fallen slightly for the last two years. Milk fat and protein reached 4.36% and 3.61%, respectively, continuing progress driven through genetics and the Economic Breeding Index which is increasing at a rate of €5 annually.

Of particular note is the change in calf crop from the dairy herd, with 63% of dairy births registered to a beef sire in 2025 (57% in 2024 and 47% in 2020). This is driven by increased use of sexed semen and dairy beef straws by dairy farmers, and as a result the average commercial beef value (CBV) has increased to €77. Increased financial returns from stock (calves and cull cows), and strong milk prices for most of the year contributed to the rise in dairy farm incomes to an estimated €137,000.

Costs of production in terms of cent/litre remain high, and reducing this will be a focus on farms for 2026, given current milk prices. Dairy farmers continue to invest in technology to reduce labour and increase performance and applications and claims under TAMS 3 indicate strong interest in automation of calf feeding, and health and fertility monitoring.

National Farm Survey data for 2024 indicated the carbon footprint of milk remained similar to 2023 whereas N balance per ha increased due to higher N fertiliser use, trends which are likely to have continued in 2025.

## Beef

Incomes increased substantially in 2025 on both suckler and dairy beef farms, marking a significant improvement on previous years. This was driven by much improved prices, but the volume of output from the sector declined.

Prime cattle slaughterings fell by approximately 100,000 head or 8% in 2025; however, this was partially offset by a 5 kg or 1.5% increase in average carcass weight. The average age at slaughter remained unchanged at 26.5 months. Suckler cow numbers continued to decline with a reduction of 29,000 (approximately 3%) in suckler calf registrations in 2025 compared to 2024.

The proportion of prime beef cattle slaughterings originating from the dairy herd continued its upward trend in 2025. Dairy-bred animals accounted for 62% of prime cattle slaughterings, reflecting the ongoing structural shift in beef supply following the abolition of milk quotas.

Favourable weather conditions throughout the year supported improved grass growth rates on beef farms which increased from 10.1 to 10.75 t DM/ha (beef farms in Pasturebase Ireland), and this contributed to the heavier average carcass weights. There was little change in any of the genetics and breeding indicators (calves/cow per year, calving interval, Suckler cow replacement index and percentage of heifers calving between 22 and 26 months).

National Farm Survey data for 2024 indicated the carbon footprint of beef improved while N balance per ha increased due to higher nitrogen fertiliser use compared to 2023 data.

## Sheep

Family Farm Income on sheep farms is estimated to have increased significantly in 2025 to €36,500, mainly driven by increased prices for lamb. Favourable spring weather and good mid-season grass growth along the western seaboard where most sheep farming is practised. This resulted in increased grass growth and allowed for less weather-related challenges at lambing time. However ewe numbers fell by 2.8% (2024 data) and throughput of lambs through Irish meat processors decreased significantly by 17% in 2025.

National Farm Survey data for 2024 indicated the carbon footprint of sheepmeat was similar to 2023 while N balance per ha increased due to higher nitrogen fertiliser use.

## Pigs

After the unprecedented economic crisis in 2022, the Irish pig sector has shown a strong recovery with the number of pigs produced per sow per year (27.8 in 2024) and FCE (2.37 kg feed/kg liveweight gain in 2024 vs 2.42 in 2023, from weaning to sale) in 2024 back to pre-crisis figures.

The focus by farmers, Teagasc and other stakeholders on both efficiency as well as growth has resulted in the highest ever herd feed conversion figures with sows producing 2.55 tonnes of meat from 8.85 tonnes of feed in 2024. Pigs born alive per litter is a metric which has also shown a steady increase in recent years and it increased to 15.33 in 2024 compared to 14.94 in 2023.

The reduction in pigmeat prices towards the end of 2025 have impacted on profitability in the sector. The lower pig meat prices expected for 2026, and the limitation of sows to keep increasing piglets born alive, indicate that the focus in coming years should be on further improving efficiency.

## Tillage

2025 saw a recovery in Irish cereal production, driven by increased winter cereal area and notably stronger winter wheat yields. Total cereal output is estimated at 2.23 Mt, above the five year average of 2.10 Mt. Total tillage area remained stable in 2025: cereal area increased by 4.6% from 2024 but the area of spring beans and winter oilseed rape declined in 2025.

Dry weather at crucial times during the season was a significant factor in cereal production recovering in 2025. However, lower grain prices compared to 2024 meant that income on tillage farms (at €47,200) is estimated to have only modestly improved compared to 2024. Associated livestock enterprises on tillage farms were largely responsible for this modest increase.

Cover crop area rose from an estimated 30,000 ha in 2023–24 to about 52,000 ha in 2025.

Specialist tillage farms report direct emissions intensity of roughly 0.64 t CO<sub>2</sub>e/ha and low nitrogen and phosphorus balances.

## **Horticulture**

2025 was largely a positive growing year for all horticultural sectors due to improved weather compared to 2024. However, there was a strong negative impact of Storm Éowyn with 153 growers suffering crop losses or structural damage.

Labour cost and availability continue to be the major challenge for the sector, rising by 7.3% in 2025 and accounting for 42.6% of total costs. As a result, there is growing automation within the sector, with 16 robots now in use in the mushroom sector and an estimated 650 ha of field vegetables planted by automatic planters.

Progress is also being made in the reduction of peat use, with 7% of mushrooms now produced in peat free systems. The organic vegetable sector is showing annual growth of c. 10%, with sales reaching €53.6m in 2024.

## **Forestry**

Ireland's forest sector now has 24,000 private forest owners who accessed grants since 1980 to establish their forest, and 82% of these are farmers. In 2025, the area of new forest planted was 2,527 ha, an increase of almost 1,000 ha on the 2024 figure, but further progression of forest planting rates towards national planting targets in 2026 remains a key sectoral challenge.

The other key event for forestry during 2025 was Storm Éowyn, which caused wind damage to over 26,000 ha of forest and resulted in major logistical and financial challenges for forest owners. Downward pressure was reported on timber prices based on storm related impacts.

# PROGRESS ON CLIMATE



# Climate

Agricultural greenhouse gas emissions have declined annually since 2022, reaching a cumulative 4.6% reduction in 2024, relative to the 2018 baseline. Provisional EPA estimates indicate a further 0.6% decrease to the end of Q3 2025, mainly driven by lower cattle numbers and partly offset by increased nitrogen fertiliser use.

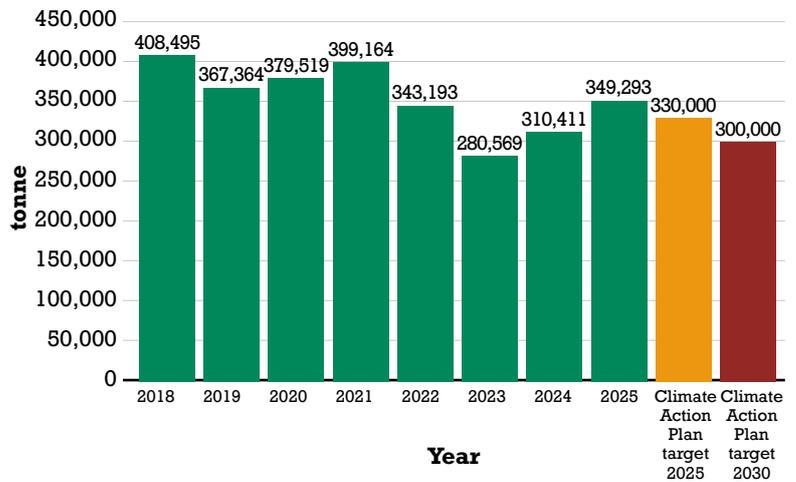
Input-use trends during 2025 were mixed: total nitrogen fertiliser sales increased, while the share of protected urea declined for the first time. Sales of phosphorus and potassium fertilisers rose, supporting soil fertility and productivity, although lime sales dropped by almost 90,000 tonnes to 930,000 tonnes, its lowest level in five years.

Other MACC measures:

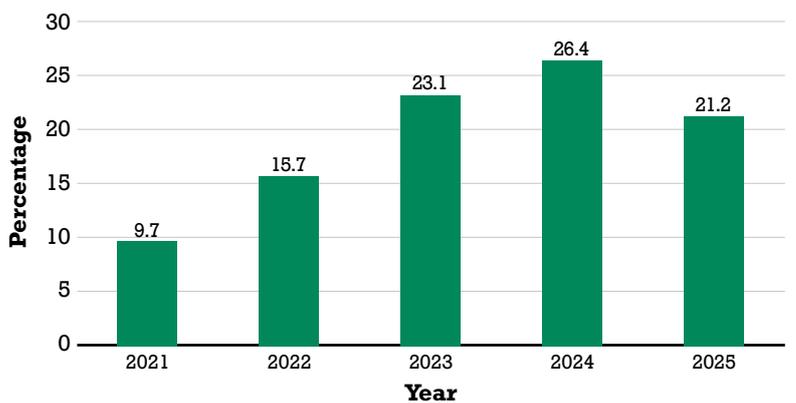
- 5.5% of total land area farmed organically (Target 10%);
- Forestry planting increased in 2025 to 2,500 hectares (target 8,000 hectares/year);
- Reducing the age at finishing of beef animals has stalled, with no improvements seen in 2025.

Advisory engagement with farmers continued to expand. By the end of 2025, 58,000 farmers had access to AgNav, nearly 20,000 registered in the Signpost Advisory Programme and over 17,000 had a sustainability plan. The Signpost demonstration farmers showed strong uptake of Teagasc MACC measures, including increased usage of protected urea, reduced reliance of fertiliser nitrogen, achievement of age at finishing targets, and integration of cover crops and straw incorporation into tillage rotations.

**Fertiliser N sales since 2018 and MACC Targets** (DAFM)



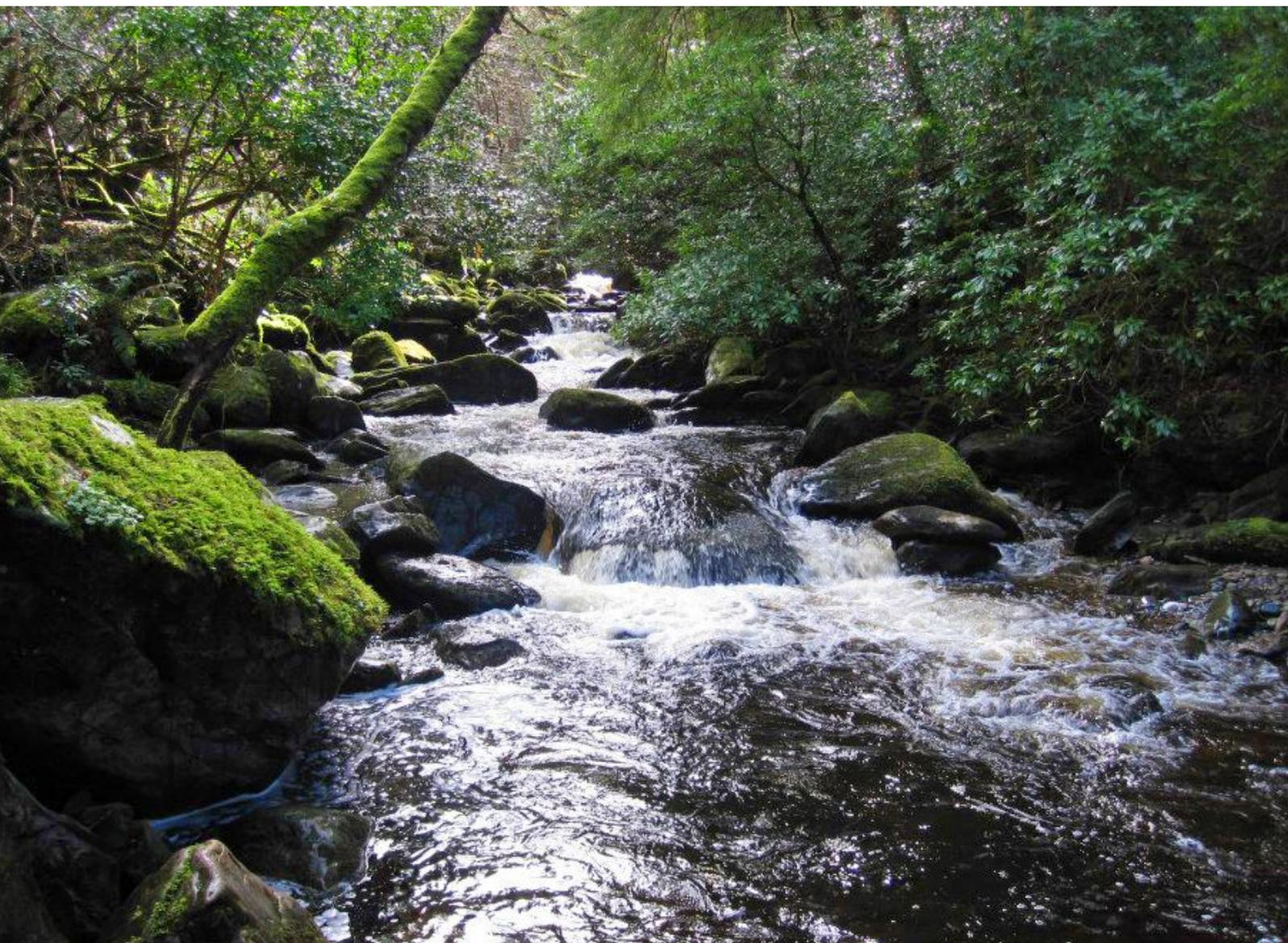
**Protected urea as % of nitrogen sales** (DAFM)



**Fertiliser report 2025 v 2024** (DAFM)

<b>Total chemical N Use</b> 349,293 tonnes (+12.5%)	<b>Protected Urea</b> % of straight N as protected urea 21.2%	6.3% of total N in fertiliser compounds as Protected Urea
<b>Urea &amp; Protected Urea</b> 45.7% of straight N market (Ordinary urea and Protected urea)	<b>Total Phosphorus</b> 32,556 tonnes (+13.3%)	
<b>Total Potassium</b> 100,501 tonnes (+14.1%)	<b>Compound Fertiliser use</b> increases by 14.4%	
<b>National lime</b> requirement is 1.85m tonnes in 2026 (MACC)	<b>Lime</b> 930,000 tonnes (DAFM)	

# PROGRESS ON WATER QUALITY



# Water quality

Teagasc established a new Water Quality Knowledge Transfer department in 2025. The department is responsible for leading Teagasc's activities across advisory programmes to support the farmers to implement actions to improve water quality.

The Better Farming for Water 8-Actions for Change campaign continued to ramp up during 2025. The commitment to appoint 6 Catchment Coordinators was delivered and they led the progression of the campaign by establishing a dedicated Catchment Implementation Oversight Committee for each of the 8 priority catchments identified for targeted action by the campaign. Using catchment science principles, they have also led the development of bespoke catchment action plans.

While the latest EPA Water Quality in Ireland 2019-2024 report showed a further slight decline in surface water quality, the report did highlight that in priority areas for action (PAAs) where ASSAP have been working mean phosphorus concentrations in rivers are consistently below the good status environmental quality standard of 0.035 mg/l. Furthermore, P concentrations are on average 22% lower in PAAs than non PAAs.

The focus for ASSAP advisors in 2025 was to submit applications for farmers to the Farming for Water EIP. The EIP provides funding to farmers to implement measures to reduce the loss of diffuse nitrogen, phosphorus, sediment and pesticides to water. Teagasc advisors contributed to the success of the EIP in 2025 assisting 1814 farmers to apply for financial support across drystock and tillage farms in eligible catchments.

# Farming for Water EIP

## Total Applications Received since opening of EIP



## Teagasc applications in 2025



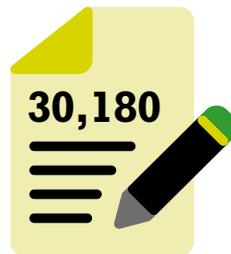
## Total value of payments made



## Number of applicants paid



## Number of measures applied for under EIP



## Percentage of measures implemented



## Surface Water Ecological Status (monitored rivers, lakes, estuaries and coastal waters)

(EPA)



# SOIL FERTILITY



# Technical Performance - Soil Fertility

In 2025, Teagasc analysed 39,033 soil samples, 89% of which came from grassland systems. The overall sample number declined by 44% compared with 2024, with reductions across dairy (↓13.5%), drystock (↓62%), and tillage (↓20%). The findings presented in this report are provisional and may be subject to change on further analysis.

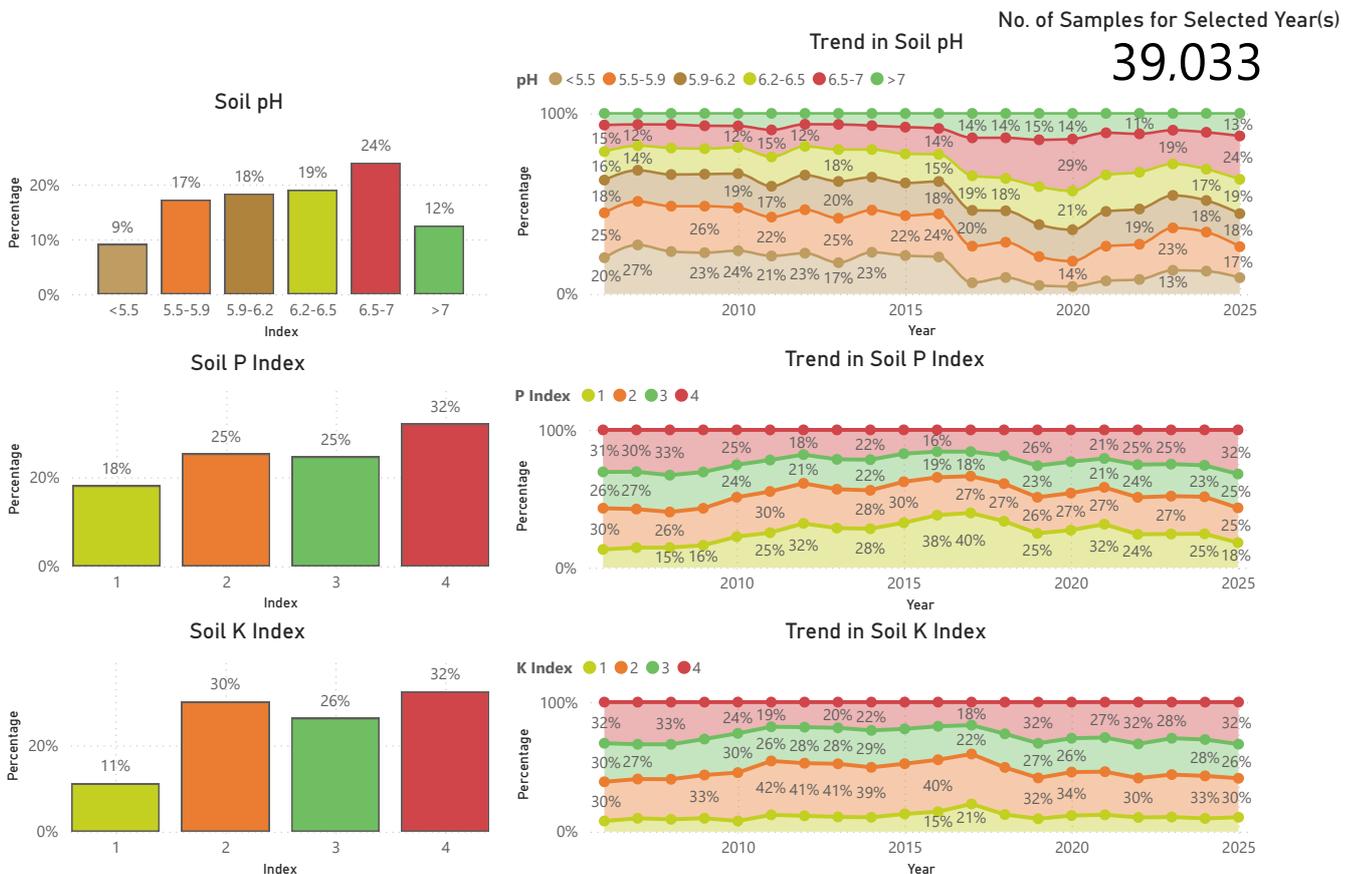
Overall soil fertility showed modest improvement. Soils with a pH greater than 6.2, while also having phosphorus (P) and potassium (K) in the medium to sufficient range (Index 3 or 4) increased to 25% (↑5% on 2024). Soil acidity declined, with 44% of soils below pH 6.2, down from 52% in 2024. Suboptimal phosphorus levels (Index 1 and 2) fell to 43% (↓9%), while suboptimal potassium declined slightly to 41% (↓2%).

Dairy systems performed strongest, with 34% of soils meeting good fertility criteria and continued incremental gains in pH and P and K status. Drystock and tillage systems improved more modestly, with a substantial proportion of soils remaining at low P and K indices.

Overall, the results indicate gradual improvement, likely reflecting increased lime use, higher concentrate feeding, and improved organic manure management. Importantly, the positive trends suggest that the temporary decline in P and K fertiliser use, following the 2022 increase in fertiliser price, has not resulted in a lasting deterioration of baseline soil fertility. However, a significant proportion of soils remain acidic or nutrient-deficient, highlighting the need for sustained, targeted nutrient management.

## Soil Analysis Status and Trends

(Teagasc)



# GENERATIONAL RENEWAL



# Generational Renewal

Generational renewal is a challenge facing the agriculture sector in Ireland. Official statistics highlight the progressive aging of the farm holder population, the declining proportion of farm holders that are less than 40 years of age and the low proportion of farms with a succession plan.

In September 2025 the report of the Commission on Generational Renewal in Farming was published by the Minister for Agriculture, Food and the Marine Martin Heydon TD. The Commission's report drew heavily on research and analysis by Teagasc researchers and advisory specialists and made 31 recommendations to Government relating to inter alia CAP Supports; pensions; taxation; access to finance; access to land; collaborative arrangements; advisory services; education and training; gender balance; and the overall attractiveness of the sector.

In 2025 thousands of farm families, with the assistance of Teagasc Specialists and advisors, initiated discussions on farm succession via attendance at Teagasc's Transferring the Family Farm clinics and engaged with different collaborative farming models such as Registered Farm Partnerships. Teagasc in conjunction with dairy cooperatives in the West Cork region piloted bespoke succession planning workshops with farmer milk suppliers and their cooperatives.

Teagasc's Generational Renewal Week in September 2025 showcased the opportunities for young people in agriculture and how farm families can navigate their own farm succession journeys.

## Proportion of Farms with a Succession Plan

	2020	2023
Farms with a Succession Plan	46.1	46.5

Source: [CSO Census of Agriculture 2020](#), [CSO Farm Structure Survey 2023](#)

## Average age of Farm Holder by Farm System

	Dairy	Cattle Rearing	Cattle Other	Sheep	Tillage
2023	54.1	61.1	58.6	59.1	55.4
2024	55	61.1	59.7	59.6	56.7

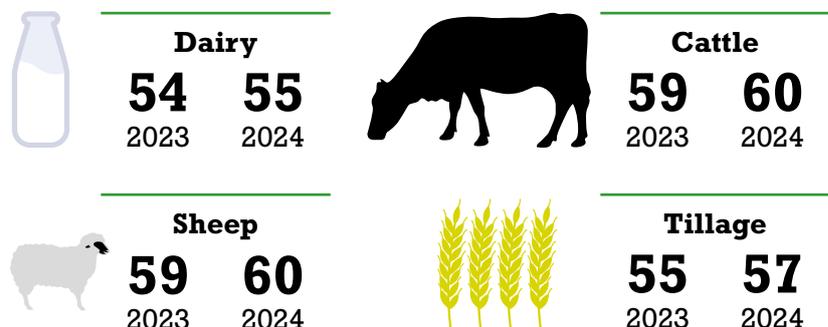
Source: [Teagasc National Farm Survey \(2025\)](#)

Numbers Attending Transferring the Family Farm Events		Registered Farm Partnerships	
2024	2025	2024	2025
1,240	1,310	3,836	4,220

Source: [Teagasc and DAFM](#)

## Farmer Age Profile

(Teagasc NFS)



## Succession

(Teagasc)

### Number attending Transferring the Family Farm events



## Registered Farm Partnerships

(DAFM)



# GRASS GROWTH



# PastureBase Ireland Material – Advancing the Agri-Food Sector in 2025

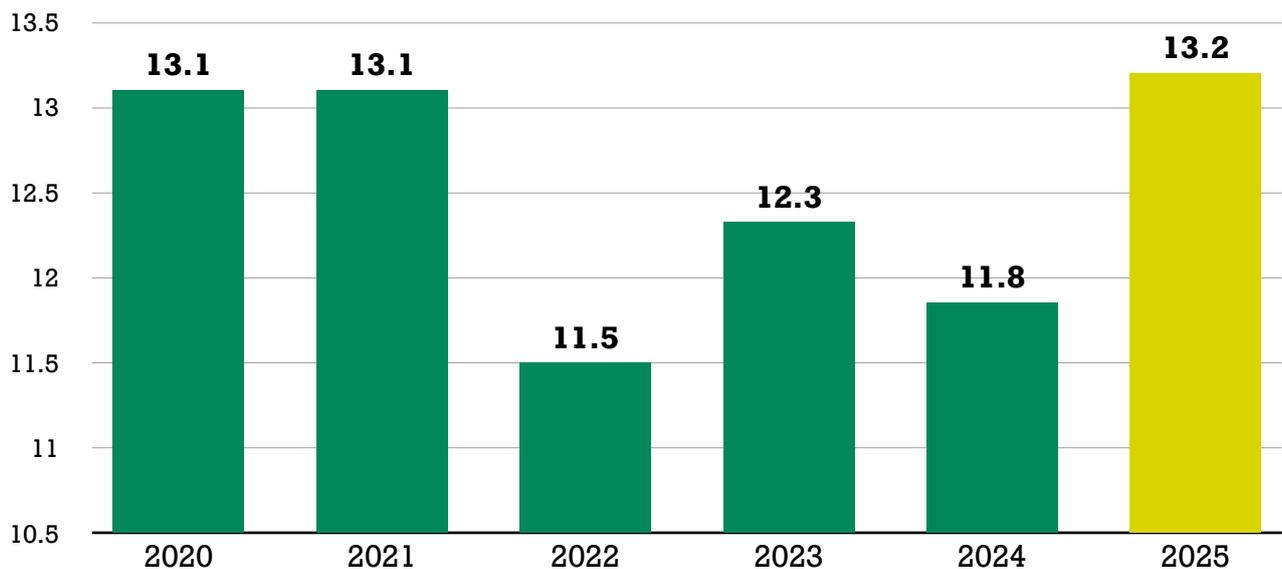
## GRASS GROWTH

Overall, 2025 was a good grass growing year with 13.2 T DM/ha grown on average across the country. After a reduction in 2023 and 2024 it is reassuring to see a return to previous growth rates in 2021 and 2022. Some counties were affected by low moisture availability in the summer, particularly the south and southeast of the country however, autumn growth allowed most farms to catch up on grass growth.

PastureBase Ireland has developed into a crucial measurement and reporting tool for farmers. While grass measurement is still the main focus of PastureBase the uptake of extra decision support tools is apparent. In 2025 over 272,500 nutrient applications were recorded across the grazing season. At peak milk supply over 2,000 farmers had milk data coming into their PastureBase account directly from their milk supplier. Other tools such as the rotation planners and grass budget are being used on farm to extend the grazing season. The fodder available budget is providing a simple way for farmers to monitor the amount of fodder available, making them more resilient to any grass shortages over the grazing season. PastureBase also provides useful reporting tools for farmers to analyse and improve on their year-to-year performance on annual tonnage, nutrient applications and nitrogen use efficiency.

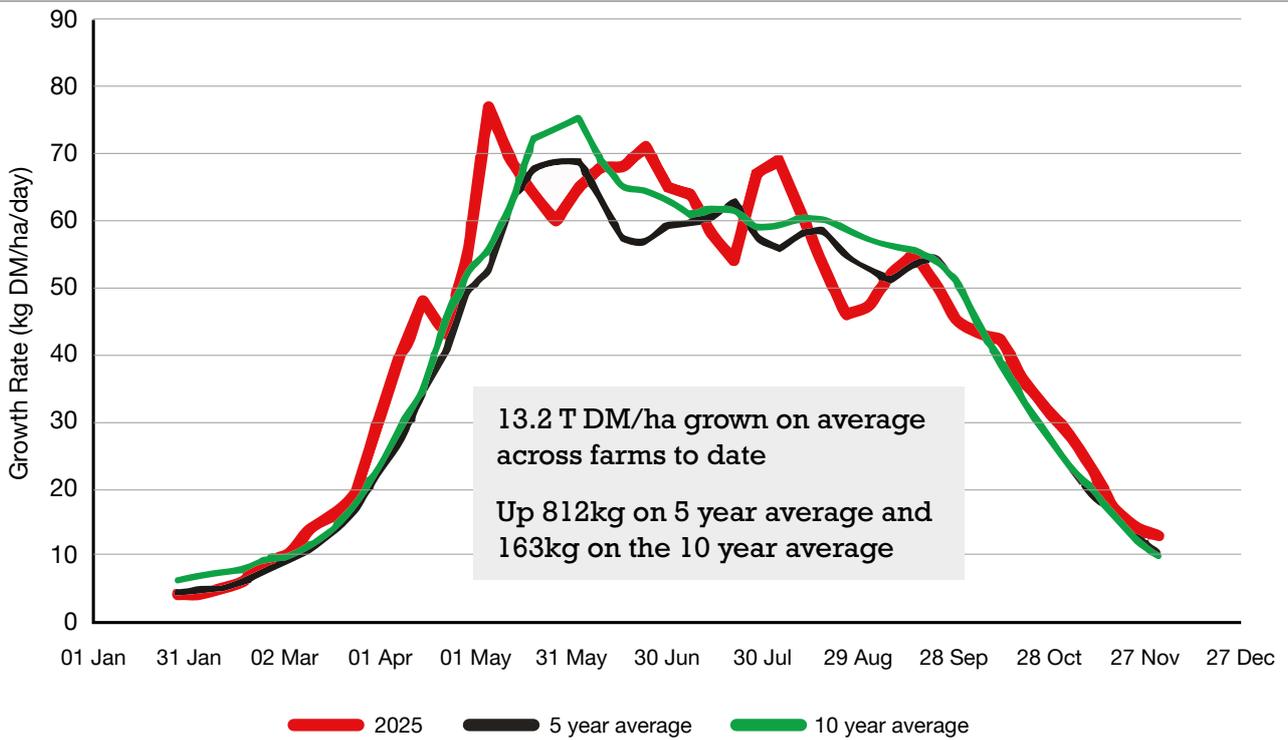
Annual average grass growth on PastureBase Ireland 2020 - 2025

( PastureBase)



**PastureBase Ireland Growth Curve**

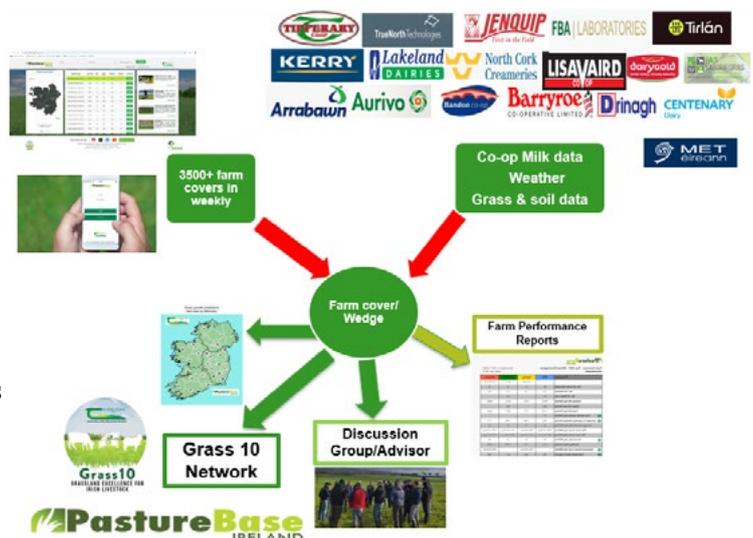
( PastureBase)



	2025	2024	
<b>Spring</b>	<b>2.2 T DM/ha</b>	1.8 T DM/ha	Far better ground conditions in spring 2025 compared to 2024
<b>Summer</b>	<b>6.0 T DM/ha</b>	5.3 T DM/ha	Some areas of low moisture availability in the south and southeast of the country but overall good growth
<b>Autumn</b>	<b>5.0 T DM/ha</b>	4.7 T DM/ha	A favourable autumn allowed counties affected by lower growth rates to catch up on grass growth

- 7,000 farms on PBI
- >150,000 grass covers uploaded in 2025
  - » 38% of these covers are uploaded through the offline mobile application
- 272,508 fertiliser applications uploaded to PastureBase Ireland in 2025
  - » 149,112 from the offline mobile application
  - » 123,396 from the website
- Extra features/decision support tools: MoSt Grass Growth Prediction Model, farm mapping, Nitrogen Use Efficiency % calculator, fodder available budget, grass budget

Farm milk sales data was supplied to PastureBase Ireland by dairy processors Arrabawn, Aurivo, Bandon, Barryroe, Centenary, Dairygold, Drinagh, Kerry, Lakeland, Limerick Liquid Milk Producers, Lisavaird, North Cork and Tirlan for farmers who opted in on PastureBase. Additional farm data was supplied by Met Eireann, FBA laboratories, JENQUIP and True North Technologies (17 data sources – Tipperary Co Op now supply through ArraTipp).



# FARM PRICES AND INCOMES IN 2025



Teagasc estimates that farm incomes in 2025 increased strongly relative to 2024 on the back of strong increases in output prices particularly for beef cattle. Lower prices for fuel and stable feed prices partially offset the impact of increased fertiliser prices on input expenditure, which was only modestly higher in 2025 than in 2024. Most farm systems are estimated to have seen improvements in income in 2025 with incomes on tillage farms supported by improved margins on subsidiary livestock enterprises. Pig margins over feed are estimated to have decreased relative to 2024 due to falling pig prices.

In 2025 cattle, sheep and milk prices increased while pig and cereals prices on average declined.

In 2025 cattle prices increased strongly over levels observed in 2024. Finished cattle prices reached record levels and prices for prime cattle are estimated to have been over 40% higher than in 2024, while prices for younger cattle (stores and weanlings) increased by 70% on average over price levels in 2024.

Prices for lambs on average in 2025 are estimated to have increased by 6% relative to prices received in 2024, while milk prices are estimated to have been 3% higher than in 2024.

In 2025 both pig and cereal prices declined relative to 2024 with harvest prices for wheat and barley estimated to have declined by 10% relative to 2024 with pig prices on average 6% lower than in 2024.

In 2025 fertiliser prices are estimated to have increased by between 3% and 9%, while fuel prices declined by 2% to 3%. Feed prices are estimated to have been on average unchanged

relative to 2025. While feed use and fertiliser both increased in 2025 overall expenditure on inputs on most farm systems only increased modestly.

With strong increases in output prices and modest changes in input expenditure, income on cattle farming systems are estimated to have increased strongly in 2025. Family Farm Income on cattle rearing farms is estimated to have increased by over 100% to circa €30,000 per farm while average family farm income on cattle other (finishing) farms is estimated to have increased by 26% to €23,000.

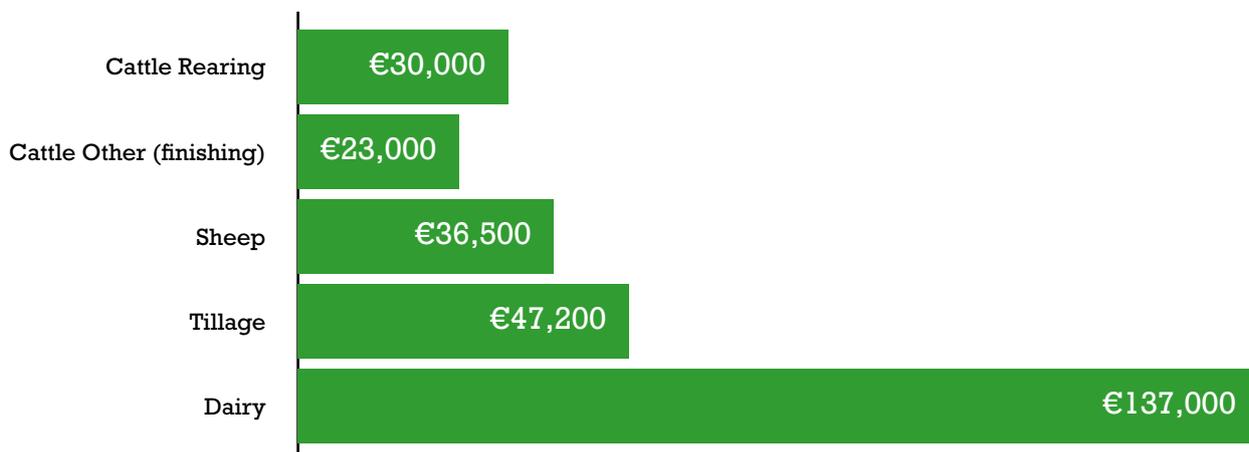
Average income on sheep farms is estimated to have increased by 33% in 2025 to €36,500 per farm. Income on the average tillage farm is estimated to have increased by 14% to €47,200. This positive income estimate in a year with lower cereal prices reflects increased yields for crops but also strong increases in the margins earned by cattle enterprises on the average tillage farm.

On dairy farms incomes also increased in 2025, with modest increases in the milk price in 2025, increased milk deliveries and stable costs per litre reflected in improvements in net margin per litre of +22% and improvements in family farm income in 2025. The average dairy farm is estimated to have earned a family farm income of €137,000 in 2025 a 26% increase on the income level achieved in 2024.

With the drop in pig prices in 2025 exceeding the estimated decline in pig feed prices, margins over feed declined. The average margin over feed earned by Irish pig farmers is estimated to have declined by 8% to €0.79 per kg deadweight.

## 2025 Family Farm Income (Est)

(Teagasc Outlook 2026)



# SECTOR PERFORMANCE REPORTS

# DAIRY

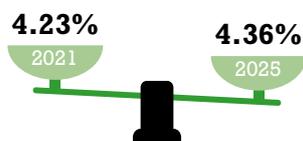


# Technical Performance - Dairy 2025

Dairy farm incomes performed strongly in 2025, through a combination of strong milk prices in Q1-Q3, improved pasture growth, relatively stable input costs, and increased milk solids output. Cow numbers declined by approximately 1.5% however milk solids content increased by 5% nationally driven by higher fat and protein kg per cow. This was driven by a recovery in annual pasture production and utilisation (+1.0t DM and +0.8t DM respectively), while concentrate supplementation per cow remained unchanged. In terms of total production costs, dairy farms spent more on fertiliser, reseeding, and capital projects, while feed costs reduced due to the unit cost of feed. The majority of dairy farms ended 2025 with adequate forage feed reserves in place. Dairy farmers also saw increased financial returns from stock sales due to high beef prices;

this has helped to drive further progress in use of higher beef merit (DBI/CBV) AI sires. Dairy AI usage also increased (sexed and conventional) by approximately 14%. Applications and claims under TAMS 3 indicate strong interest in automation of calf feeding, and health and fertility monitoring. In terms of environmental sustainability, the carbon footprint of milk remained similar, whereas N balance per ha is projected to increase due to higher N fertiliser use. Despite the positive performance for the sector overall, a sharp decline in milk price through Q4 and into early 2026 means income is projected to fall significantly for 2026; the main focus will therefore be on cost control while maintaining gains in grass utilisation. Achieving improvements in water quality management will need to be prioritised also.

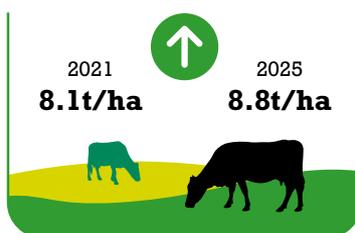
## Milk Solids (CSO)      Milk Fat (CSO)      Milk Protein (CSO)



## Cost/Kg of milk solids (Teagasc NFS)



## Pasture Utilisation (PastureBase)

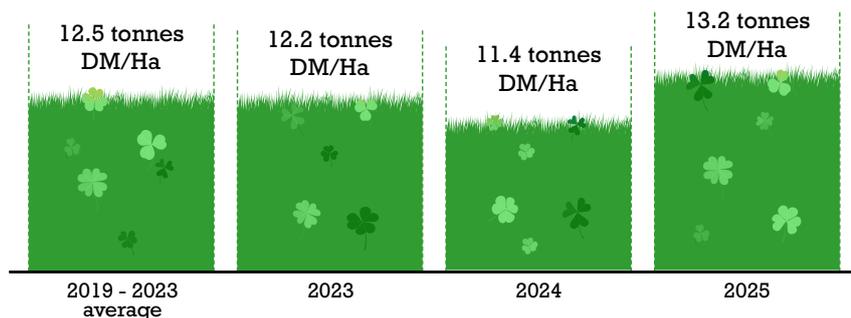


## Calving interval (days) (ICBF)



## Grass Growth

( PastureBase)



## Calf Mortality Rates (ICBF)



### Carbon Footprint

(Teagasc Sustainability Report 2024)



### Economic Breeding Index (EBI)

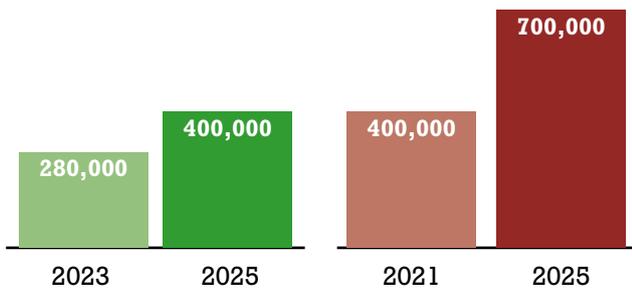
(NFS)



<sup>^</sup>Inclusive of a 97 reduction due to base change (gain is therefore €5 annually).

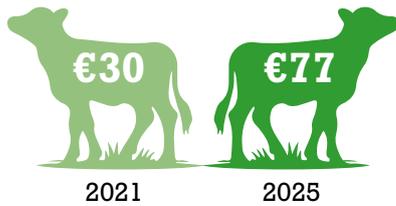
### Sexed Semen Straws (ICBF)

### Dairy Beef Straws (ICBF)



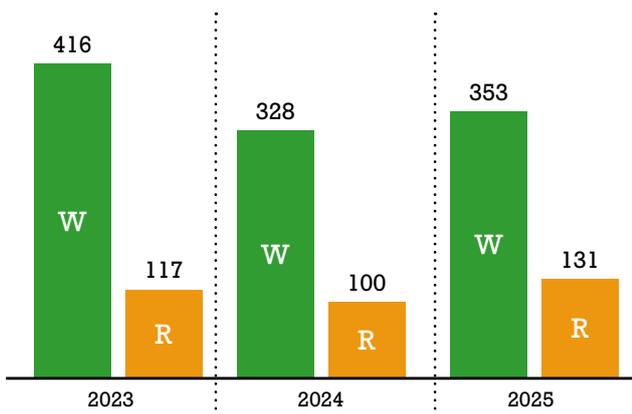
### Commercial Beef Value

(ICBF)

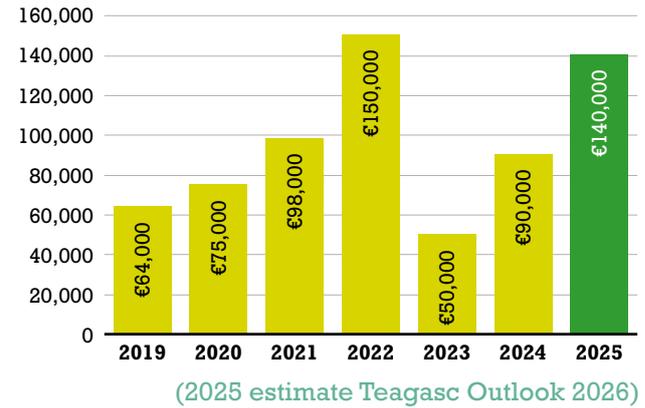


### Total Clover usage (tonnes of seed)

(Industry)

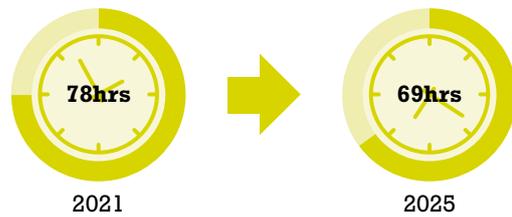


### Family Farm Income € (2019-2024 Teagasc NFS)

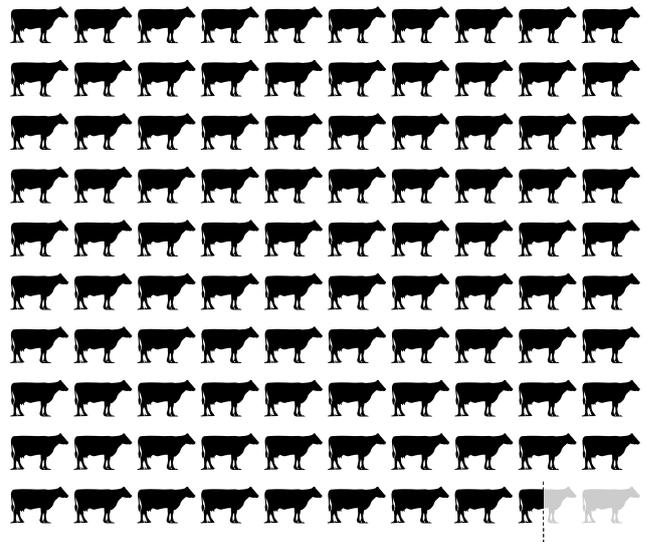


### Hours worked

(Teagasc)



### Total Milk production/no. of dairy cows (CSO)



### Dairy Cow Numbers Down 1.5% (AIM's data)

The average AIM's data for 2025 shows over a ca. 1.6% drop in cow numbers albeit with cow numbers in December 2025 higher than December 2024.

### Milk production increased by 4.8%

The following data is extracted from the Teagasc Profit Monitor system for a matched sample of 749 dairy farms across the 2024 and 2025 production years that had submitted financial and physical performance data for analysis by 30th January 2026.

The farms that complete a Teagasc Profit Monitor work closely with their Teagasc advisors to collate the required input data and then review

the Profit Monitor analysis on each farm to plan forward for the new production year.

The Teagasc Profit Monitor data is not indicative of national trends across all farms nationally as the farms that participate are self-selecting. Teagasc National Farm Survey data is the preferred data source to pick up on national trends.

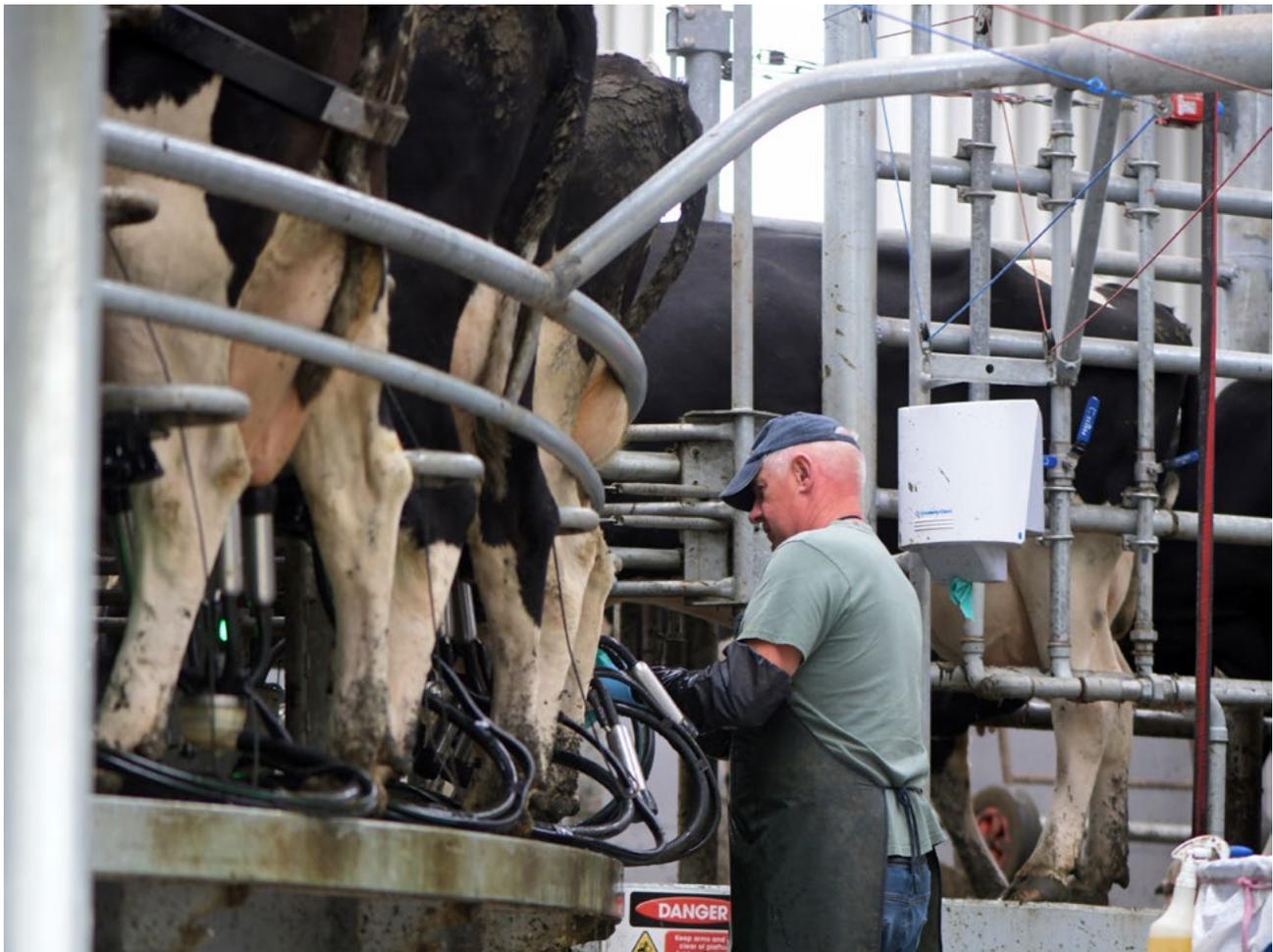
		2025	2024	2025 V 2024	
<b>Selected costs for Teagasc Dairy ProfitMonitor clients.</b> (Full economic costs for national figures must be derived from NFS data.)				<b>Change</b>	<b>% Change</b>
<b>No. Of Farms</b>		<b>749</b>	<b>749</b>		
Owned Land Ha -Dairy	Ha	57	57	0	+ 0%
Leased Land Ha-Dairy	Ha	41	38	+ 3	+ 9%
Total Land Ha - Dairy	Ha	98	95	+ 3	+ 3%
Litres Milk Produced Per Cow	Litres	5999	5674	+ 325	+ 6%
Kgs MS per cow	kg MS	515	481	+ 34	+ 7%
Purchased Concentrate Feed	c/ litre	7.41	8.16	- 0.76	- 9%
Fertiliser	c/ litre	3.34	3.05	+ 0.29	+ 10%
Contractor Services	c/ litre	3.90	3.74	+ 0.16	+ 4%
Seed, Spray & Soil Fertility Costs	c/ litre	0.63	0.51	+ 0.12	+ 23%
Hired Labour	c/ litre	2.65	2.46	+ 0.19	+ 8%
Debt Servicing Costs	c/ litre	0.85	0.97	-0.12	- 12%
Building & Machinery Depreciation	c/ litre	3.22	3.18	+0.04	+3%
Repairs and Maintenance	c/ litre	1.09	0.95	+ 0.14	+ 14%
Cash Flow Ratio (Whole Farm)	%	52	56	- 4	

Source: Teagasc Profit Monitor

Some trends in the above data

- Milk solids per cow up 7% (in line with a 5% national trend)
- Decrease in spend on purchased concentrate which could be a factor of slight unit cost decline as well as a likely decline in usage driven by improved productivity gains linked to improvements in pasture growth and utilisation. Teagasc PastureBase data confirms this trend.
- Fertiliser cost up 10% and reseedling cost up 23%, indicating further investment during 2025 in pasture productivity improvements to drive more milk production from home grown forage and reduce reliance on imported feed on these farms.

<b>Applications and Claims Received TAMS3</b>		Source: DAFM
Main Investment	Number of Claims Submitted	Value of Claims (Claimed Reference Costs)
Calf Rearing Equipment - Computerised calf feeder	684	€8,276,484
Health and fertility monitoring - Base station (including software) Collar/Tag/Bolus	1071	€15,145,161



# BEEF



# Technical Performance - Beef 2025

Incomes per hectare in the beef sector increased substantially in 2025, marking a significant improvement on previous years. This was driven primarily by a sharp increase in beef prices, while input costs remained broadly stable. The average R3 steer beef price in 2025 was €7.16 per kg deadweight, compared to €5.18 per kg in 2024, representing an increase of approximately 38%.

The strong uplift in beef prices reflected developments across major global beef markets, where declining production levels coincided with relatively resilient demand for much of the year. Higher finished cattle prices translated into significant increases in mart prices for weanlings and store cattle, delivering notable income gains for suckler-to-weanling producers. Net margins on single suckling farms are estimated to have increased by over €700 per hectare in 2025 relative to 2024.

Favourable weather conditions throughout the year supported improved grass growth rates on beef farms, while winter fodder reserves were generally reported to be adequate. Despite improved profitability, suckler calf registrations continued their downward trend, declining by almost 29,000 head in 2025 compared to the previous year.

Prime cattle slaughtering's fell by approximately 100,000 head in 2025; however, this was partially offset by a 5 kg increase in average carcass weight. The average age at slaughter remained unchanged at 26.5 months. Looking ahead to 2026, prime cattle slaughter numbers are expected to remain broadly in line with 2025 levels.

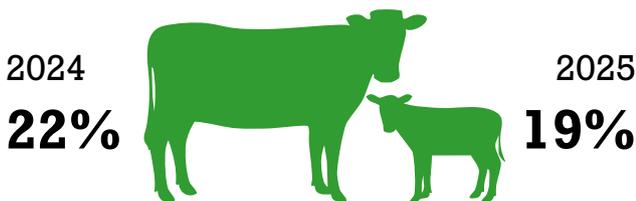
## Calves born to suckler cows/year (ICBF)



## Suckler cows calving interval (days) (ICBF)



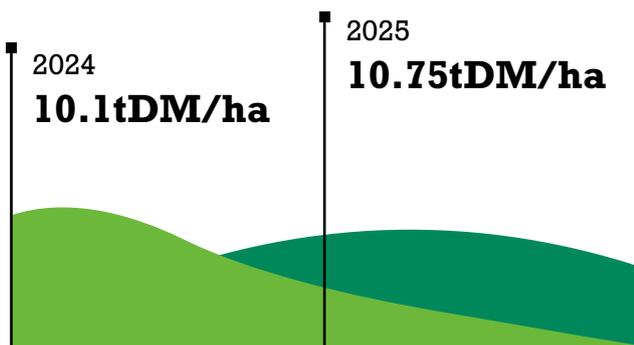
## Percentage of heifers calving between 22 and 26 months (ICBF)



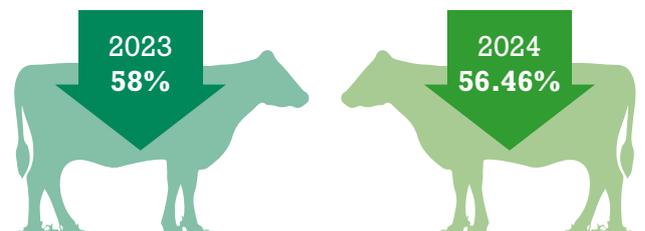
## Ave. Suckler cow replacement index (€) (ICBF)



## Grass production on beef farms (PastureBase)

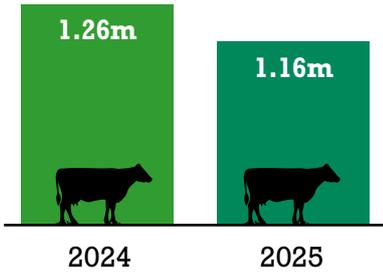


## Direct inputs as a % of outputs (Teagasc NFS)

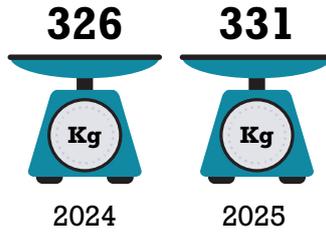


## Total Cattle Slaughter data

### Prime cattle slaughtered (DAFM)



### Ave. carcass weight (CSO) (Steers, Heifers, Young Bulls)



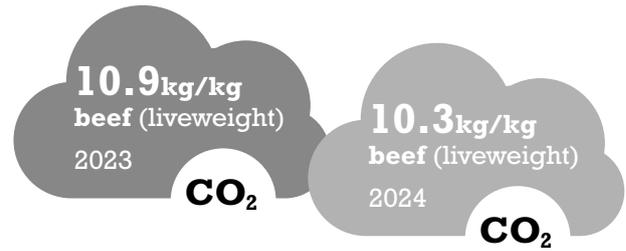
### Ave. age at slaughter (ICBF) (Steers, Heifers, Young Bulls)



### Nitrogen balance (Teagasc Sustainability Report)



### Carbon footprint (Teagasc Sustainability Report)



### Prime cattle slaughtered

(ICBF)

	2024		2025	
	Number	%	Number	%
Heifers	500,655	39.7%	470,592	40.4%
Steers	658,793	52.2%	594,177	51.1%
Young Bulls	102,273	8.1%	98,650	8.5%

### Beef price (R3) steer

(DAFM)



# DAIRY BEEF



# Dairy Calf-to-Beef Farm Performance in 2025

In 2025, incomes on dairy calf-to-beef farms increased substantially, driven primarily by higher beef prices and relatively stable input costs. While calf purchase prices were higher than in previous years, the full effect of the improved finished beef prices was not reflected in calf sale prices until later in the season. As a result, the majority of calves were purchased before higher beef prices translated into significantly increased calf values.

Favourable weather conditions throughout the year contributed positively to performance on dairy calf-to-beef farms. Improved grass growth and utilisation supported better animal performance, resulting in heavier average carcass weights at slaughter. These technical improvements further enhanced farm incomes in a year characterised by strong beef market conditions.

The proportion of prime beef cattle slaughtering's originating from the dairy herd continued its upward trend in 2025. Dairy-bred animals accounted for 62% of prime cattle slaughtering's, reflecting the ongoing structural

shift in beef supply following the abolition of milk quotas. In parallel, the proportion of dairy calves sired by beef bulls increased significantly, reaching 63% of all dairy herd births in 2025, compared to 47% in 2020. This increase is largely attributable to greater use of sexed semen in dairy herds, allowing more cows to be bred to beef sires.

Improving the average commercial beef value (CBV) of calves remains a key technical focus for both dairy and beef farmers. Data consistently show that higher CBV animals achieve heavier carcass weights at younger slaughter ages, leading to higher incomes per head and reduced greenhouse gas emissions. The increasing use of beef sires in dairy herds is contributing to a higher average CBV in dairy-bred calves.

Looking ahead to 2026, calf purchase cost represents the primary concern for dairy calf-to-beef farmers. While higher calf prices are likely to persist due to strong beef prices, excessively inflated purchase prices may negatively impact future returns per hectare.

## Profitability of DairyBeef 500 farmers (original cohort)

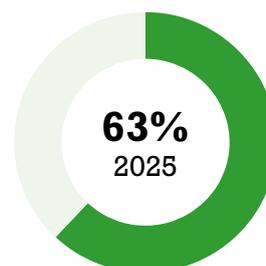
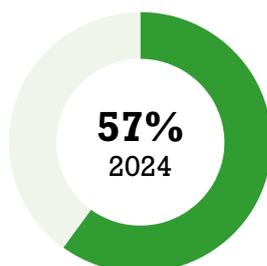
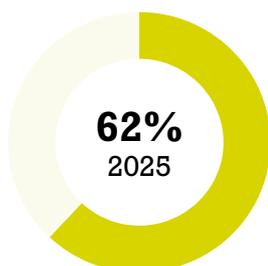
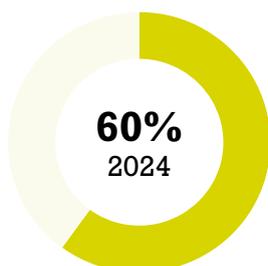
(Teagasc)

Year	St. Rate Lu/ha	Output €/Ha	Output kg/ha	Output kg/lu	Var Cost €/ha	Gross margin €/ha	Fixed Costs €/ha	Net Margin €/ha
2025	2.23	4532	1271	575	1914	2618	856	1776
2024	2.13	3285	1229	577	1771	1514	765	749
2023	2.27	3045	1195	524	1930	1114	718	396

## Proportion of slaughtered prime beef cattle derived from the dairy herd in 2024 versus 2025

## Proportion of dairy births registered to a beef sire in 2024 versus 2025

(ICBF)



# **SHEEP**





2025 was a good year for Irish sheep farming families with higher prices increasing Family Farm Income from €27,348 in 2024 to an estimated €36,500 in 2025. Favourable spring weather and good mid season grass growth along the western seaboard where most sheep farming is practiced resulted in increased grass growth. Grass yields have risen year on year from 7,950 kg DM/ha in 2023 to 8,000 kg DM/ha in 2024, with 2025 figures estimated to be approximately the same as 2024. Favourable weather conditions allowed for less weather related challenges at lambing time and better grass growth throughout the year.

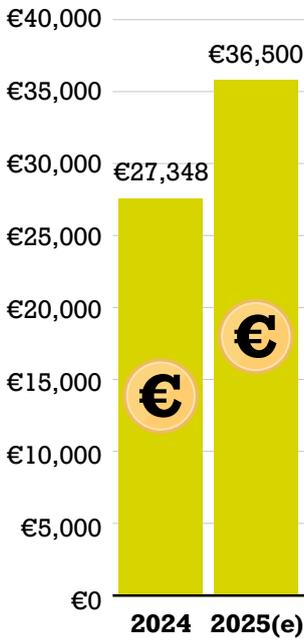
Direct inputs as a percentage of outputs show improvement, dropping from 50% in 2023 to 42% in 2024, suggesting better efficiency, higher product prices and a reduction in the cost of inputs such as fertiliser although this was largely offset by increased fertiliser use.

Despite this improved profitability the throughput of lambs through Irish meat processors to decrease by 17%, from 2,229,148 in 2024 to 1,854,724 in 2025. Consequently the value of sheep meat exports also declined by approximately 10%, from €400 million in 2024 to €360 million in 2025. This significant drop in lamb numbers available for slaughter can not be explained by a modest reduction in the size of the breeding flock or reduced imports of Northern Irish lamb and may be an indication that some farmers are not breeding all of their ewes.

From an environmental perspective, the carbon footprint measured as CO<sub>2</sub> per kg liveweight and nitrogen balance are being monitored and are increasing slightly as a result of increased fertiliser nitrogen use.

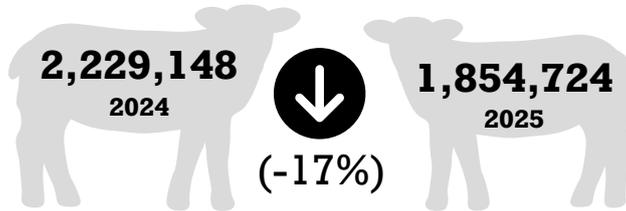
# Technical Performance - Sheep 2025

## Family Farm Income (NFS Outlook 2026)

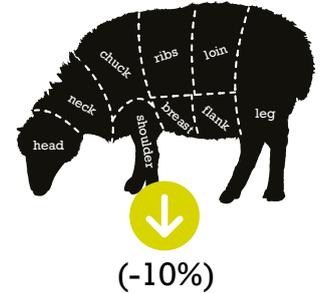


## Throughput of lambs (through Irish meat processors)

(Bord Bia)

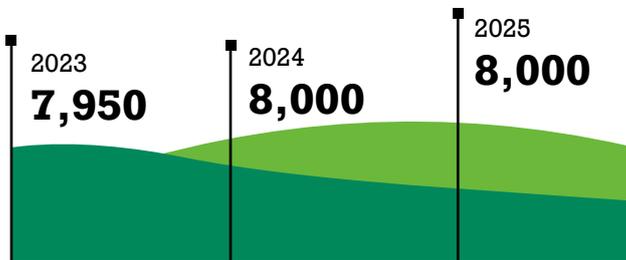


## Value of sheepmeat exports (Bord Bia)

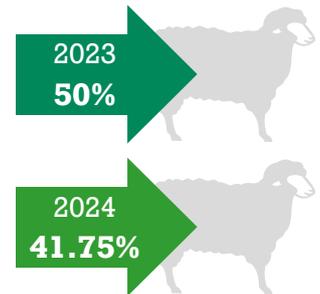


2024 2025  
**€400m €360m**

## Grass production (Kg DM/ha) (PBI Teagasc Better Farms)



## Direct Inputs as % of Outputs (Teagasc NFS)



## C-Footprint

The Teagasc NFS Sustainability Report for 2024 (released in 2025) stated that absolute greenhouse gas (GHG) emissions declined on the average sheep farm compared to previous years. This decline was primarily attributed to lower livestock numbers (reduced stocking rates).

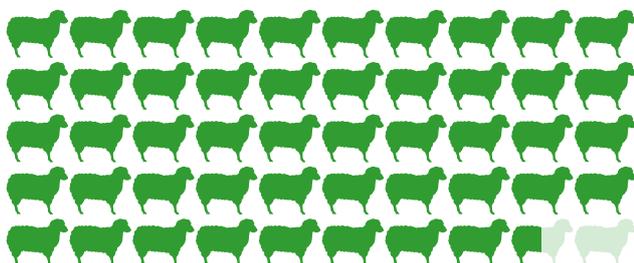
## N Balance (Teagasc Sustainability Report 2024)



## Certified Organic (DAFM)



## Drop in ewe numbers end 2024 (CSO)



# PIGS





After the unprecedented economic crisis in 2022, the Irish pig sector has shown a strong recovery with the number of pigs produced per sow per year and FCE in 2024 back to pre-crisis figures. The focus by farmers, Teagasc and other stakeholders on efficiency and not only growth has resulted in the best yet herd feed conversion figures with sows producing 2.55 tonnes of meat from 8.85 tonnes of feed in 2024.

The lower pig meat prices expected for 2026, the reduction in kill-out weights by some slaughterhouses, and the limitation of sows to keep increasing piglets born alive, indicate that the focus in coming years should be on improving efficiency even more and based on excellent husbandry, regular data analysis and strategic decision making.

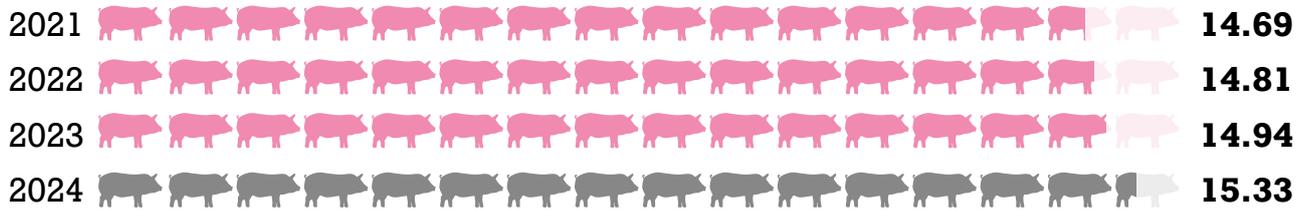
Looking at other countries and the figures presented here for 2024, further reductions on FCE should be possible and improvements in sow management should result in more litters per sow per year. This changes will result in a more sustainable Irish pig sector."

**Sources: Teagasc Profit Monitor**

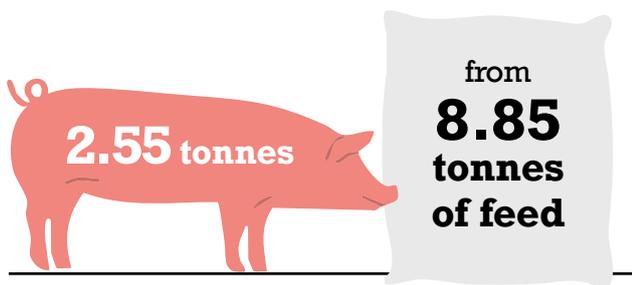
# Technical Performance - Pigs 2025

## Pigs born alive/litter

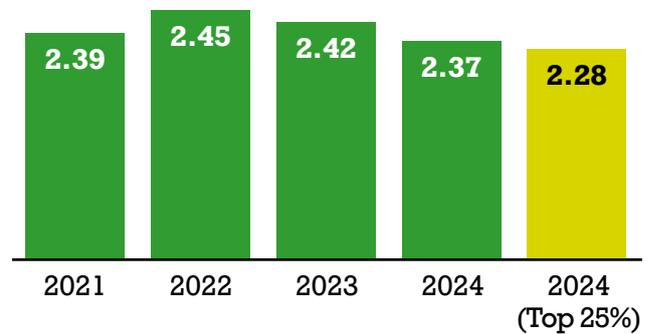
(Teagasc Profit Monitor)



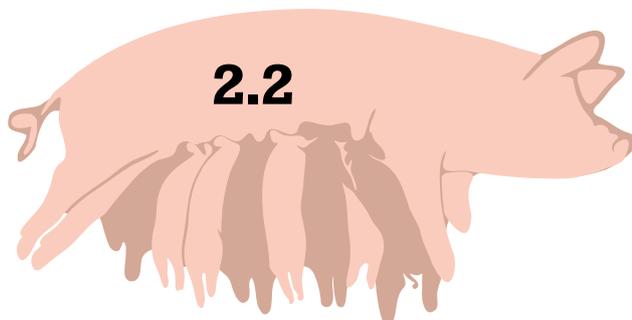
## Tonnes of Pigmeat/Sow/Year



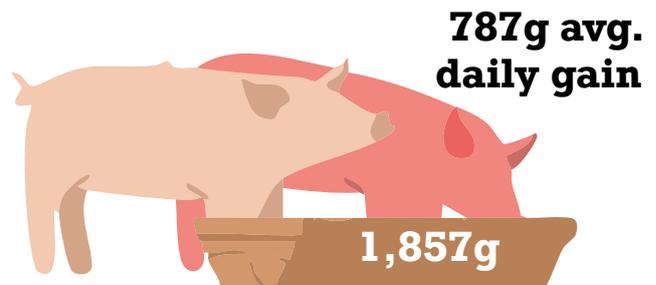
## FCE (weaning to sale)



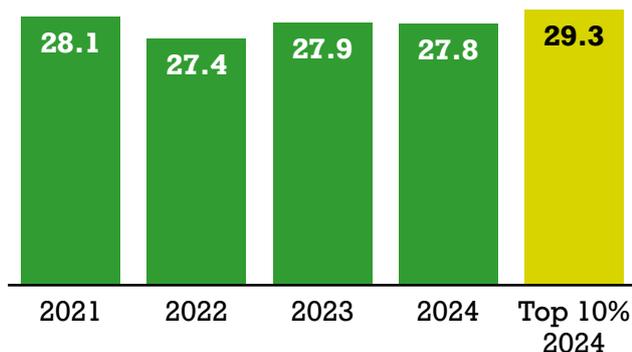
## Litters/Sow/Year



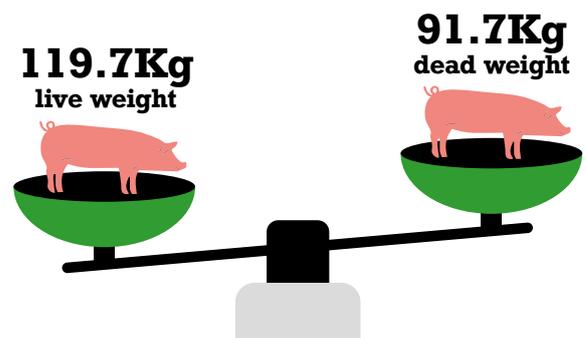
## Daily Feed Intake & Live Weight Gain (weaning to sale)



## Pigs Produced/Sow/Year



## Weight



# TILLAGE



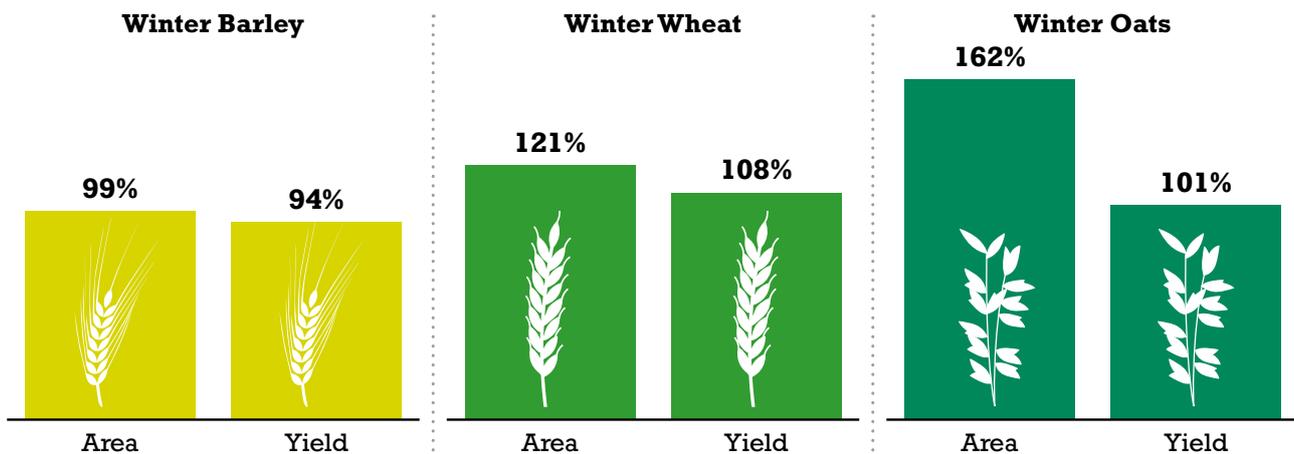
# Technical Performance - Tillage

2025 saw a recovery in Irish cereal production, driven by increased winter cereal area and notably stronger winter wheat yields. Total cereal output is estimated at 2.23 Mt, above the five-year average of 2.10 Mt. Higher yields, with increased carryover stocks, at a time when world grain prices eased for a third consecutive year, with particularly large falls in soya and other feed commodities put overall pressure on prices. Ireland continues to import substantial volumes of feed grain, which often competes on price and places pressure on domestically produced cereals. The combined effect of larger stocks, lower world prices and elevated input costs squeezed margins across specialist tillage farms despite a favourable physical harvest.

Estimated family farm income for specialist tillage farms recovered to around €47,200 in 2025, though many have mixed enterprises and stronger livestock returns influence this headline figure. Cover crop area rose from an estimated 30,000 ha in 2023–24 to about 52,000 ha in 2025. Specialist tillage farms report direct emissions intensity of roughly 0.64 t CO<sub>2</sub>e/ha and low nitrogen and phosphorus balances. Teagasc modelling indicates that replacing imported ingredients with 65% native grain in dairy rations could cut milk life-cycle emissions by about 7.4%, a saving comparable with most other on-farm mitigation measures

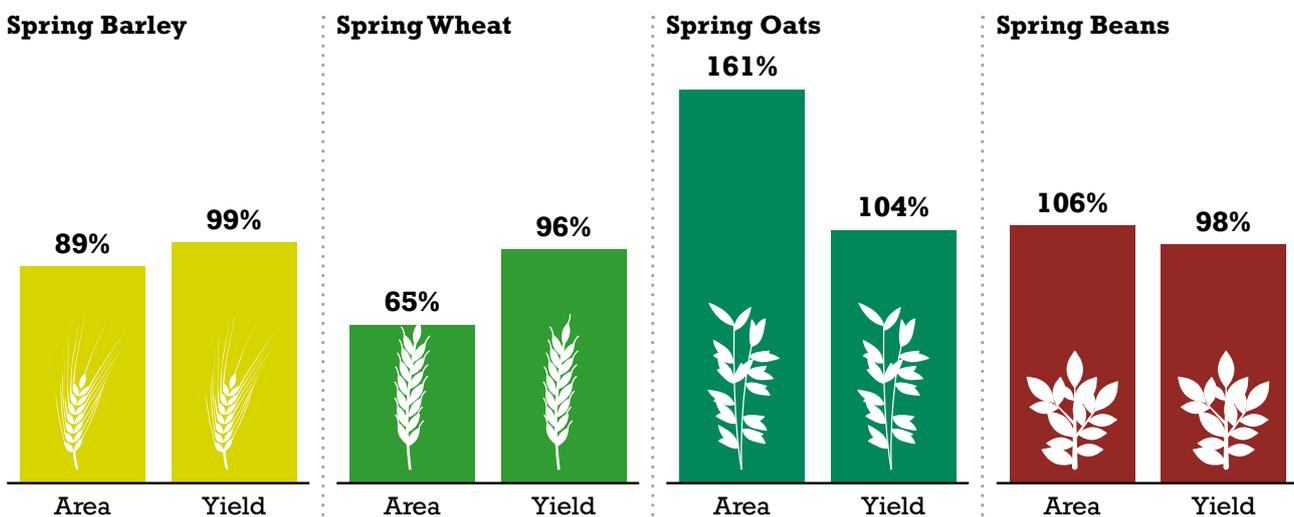
## Winter Crops (compared to 5-year average)

(Teagasc Harvest Report)



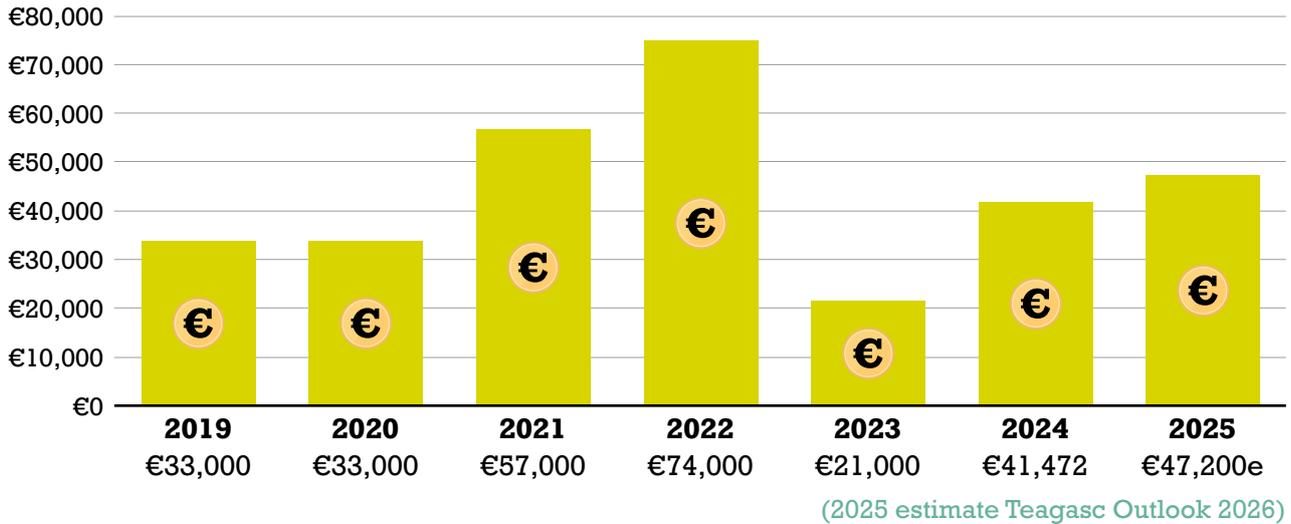
## Spring Crops (compared to 5-year average)

(Teagasc Harvest Report)



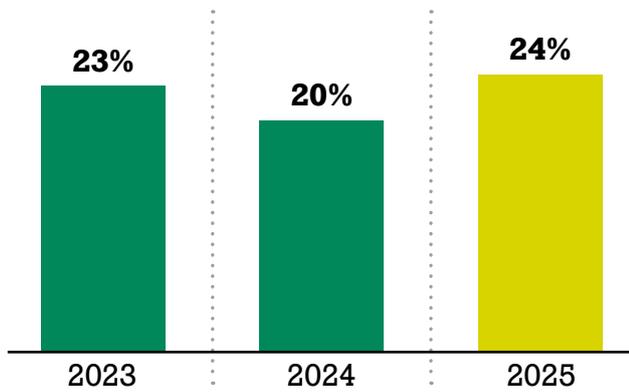
**Tillage Farm Incomes**

(2019 - 2024 Teagasc NFS)



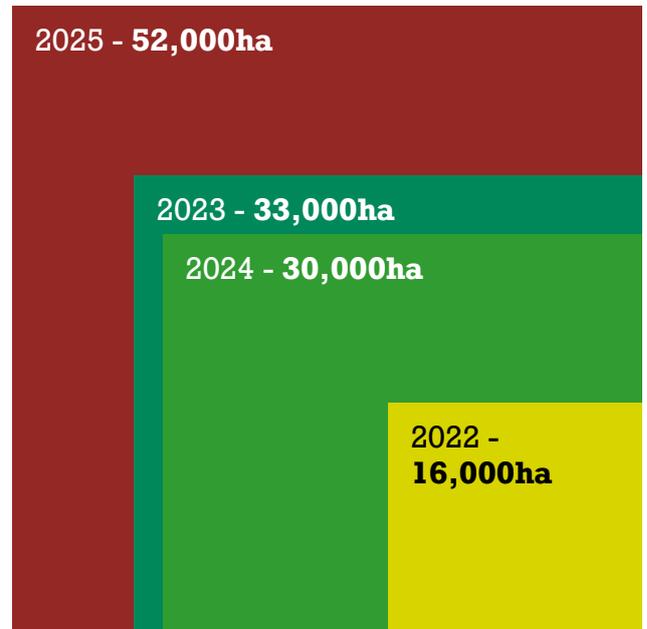
**Cover crops sown as a % of the available area for cover crops**

(DAFM)

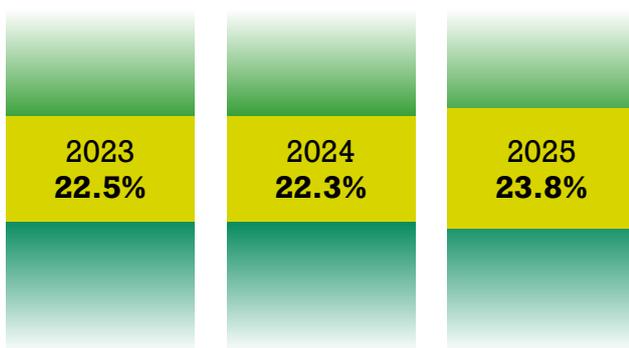


**Cover crops planted (ha) est.**

(DAFM)



**Non cereal break crops as % of the total tillage area**



**Greenhouse gas emissions**

(Specialist tillage farms – tillage only)

(Teagasc Sustainability Report)

**Nitrogen balance**

(Teagasc Sustainability Report)

Specialist tillage Farms (no livestock) N balance

2024

**24.3 kg/ha\***



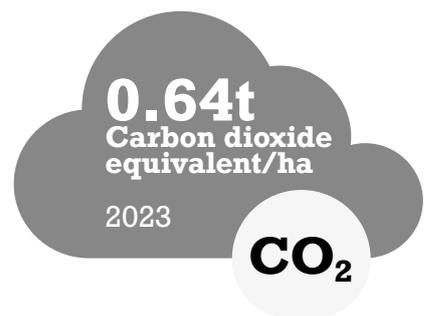
**Phosphorus balance**

(Teagasc Sustainability Report)

Specialist tillage Farms (no livestock) P balance

2024

**-0.3 kg/ha\***



# HORTICULTURE



# Technical Performance - Horticulture

2025 commenced as a very challenging year with the arrival of Storm Eowyn, with 153 growers reporting either crop loss or damage to infrastructure, or both in the storm's aftermath. Climatically the weather improved, with 2025 largely being a positive growing year for all sectors. Labour cost and availability continue to be a major challenge to the sector; it accounts for 42.6% of the total input costs and rose by 7.3% in 2025 compared to 2024. Within key sectors, such as Mushroom production 77% of the labour costs are associated with harvesting mushrooms. The sector has been investing significantly in research and demonstration of automation to reduce the reliance on labour and in 2025, 16 robots were operational, with three tunnels fitted with semi-automated solutions.

Within field vegetable production, 650Ha of field vegetables are now planted by automatic planters, again reducing the reliance on labour. Peat use continues to be a major sustainability challenge to the sector, but significant progress has been achieved with 7% of mushrooms now produced in peat free systems and the use of alternative growing media diluents increasing in the nursery stock sector. The positive growing conditions in 2025 led to good fruit set and growing conditions for crops such as apples and innovations in the soft fruit sector continue with the use of ever-bearer varieties, heated glasshouses and LED lighting systems increasing the potential Irish strawberry season from April to December.



## Mushroom industry

(Teagasc)

### Automation

Harvesting by hand accounts for 34.65% of production costs in 2025

16 robots currently deployed, 3 mushroom tunnels fitted with semi-automated solutions.



### Peat-free casings

In 2025 three farms making up 7% of national production used peat free casing.



(Teagasc)

### Cut foliage and flower production

(Teagasc)

Output

**€11.5m**

in 2025



**80%**  
exported

## Organic vegetable production

(Bord Bia)

Organic vegetable retail sales are valued at €53.6 million in 2025, growing 9.9% year on year. Organic carrots, tomatoes, broccoli, onions and cucumbers are the best sellers. Imports currently account for around 70% of retail sales in Ireland. Significant opportunities exist to increase production of Irish grown organic produce. The National Irish Organic Strategy sets out targets to reduce reliance on imports to less than 50% by 2030.



### Field vegetable automation

(Teagasc)

Teagasc estimate the area of modular field vegetable crops established by modular planters at 650ha in 2025.



## Productivity Impact Indicators

(DAFM)

<b>Edible * protected crops</b>	2022	€88,129,000
	2023	€84,002,000
	2024	€86,032,000
<b>Output - field crops</b>	2022	€89,432,000
	2023	€95,853,000
	2024	€109,383,000
<b>Outdoor -soft fruit</b>	2022	€792,000
	2023	€733,000
	2024	€722,000

<b>Output - apples</b>	2022	€9,489,000
	2023	€8,96,000
	2024	€9,116,000
<b>Output - amenity crops</b>	2022	€99,695,000
	2023	€99,293,000
	2024	€100,579,000
<b>Output - mushroom</b>	2022	€129,889,000
	2023	€136,256,000
	2024	€158,611,000

\*Strawberries are included in protected crops as they are almost exclusively grown under glass and plastic.

# FORESTRY



# Technical Performance - Forestry

Ireland's forest sector continues to evolve and represents an increasingly important resource for our economy, environment and society. Since 1980, over 24,200 individual private forest owners, 82% farmers, have accessed grant aid to establish their forests.

The severe impact of Storm Éowyn in January 2025 presented major logistical and financial challenges for forest owners. The extent of storm damage necessitated substantial decision support provision, re-planning of forest operations over the short and medium term to facilitate the harvest, recovery and marketing of windblown timber. These requirements will continue. Downward pressure was reported on timber prices based on storm related impacts. Overall felling licences (Coillte and private) for thinning and clearfell were marginally down

both in area (20,495 ha) and volume terms (6.3 million m<sup>3</sup>) compared to 2024. Road completions increased to 85 km in 2025 compared to an average of 77km in the previous two years. As well as the key UK market, there has been a level of new timber market penetration into countries such as Germany, Italy, Belgium and as far away as China.

The Annualised Equivalent Value (which can be conceptually equivalent to agricultural Family Farm Income) ranged from €560 to €710/ha/year for mainly broadleaf and mainly conifer forests respectively. New forestry planting reached 2,527ha in 2025, up almost 1,000ha on 2024 levels. Further progression of forest planting rates towards national planting targets in 2026 remains a key sectoral challenge.



**Area of new forest planted** 2025

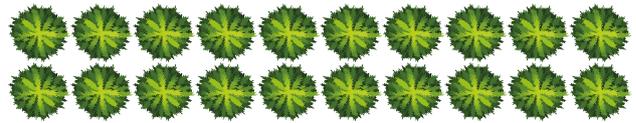
**2,527ha**



Source: DAFM Forestry Weekly Dashboard, Jan 2, 2025

**Area approved for new planting** 2025

**3,934ha**



**Annualised Equivalent Value (€/ha/yr)\***

2025



Spruce/Birch (yield class 20/8) **€658**  
 Spruce/Birch (yield class 24/10) **€710**



Sycamore (yield class 8) **€560**  
 Sycamore (yield class 10) **€588**

\*Indicative net returns to forestry, expressed as a series of equal cash flows, over the life of the forest. AEV can be conceptually equivalent to Family Farm Income. (Note, potentially available BISS/CRISS/Eco Scheme payments are not included)

Source: Teagasc Forestry Investment and Valuation Estimator (FIVE), 2025

**Timber mobilisation**

Private felling licence applications



Private felling licences issued



Source: DAFM Forestry Weekly Dashboard, Jan 2, 2025

**Forest roads constructed**



Source: DAFM Forestry Weekly Dashboard, Jan 2, 2025

**Indicative standing timber prices**

2025



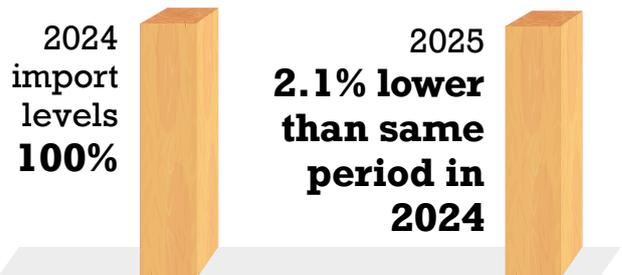
Source: Industry engagement

**Reconstitution Ash Dieback Scheme**



Source: DAFM Forestry Weekly Dashboard, Dec 27, 2024

**UK Market (overall timber imports in first 9 months)**



Source: Global Wood Market Info, December 9, 2025

Estimated 2025 Irish sawnwood exports (the majority to the UK) comprised 595,537 m<sup>3</sup>. The equivalent figure for wood based panel products is 812,000m<sup>3</sup>. Source: Dept. of Enterprise, Trade and Employment, Department of Agriculture, Food and the Marine, ARUP and Timber in Construction Steering Group, 2025.



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