

LITERATURE REVIEW REPORT

1. SUBJECT AREA - ORGANIC MARKET

a) Prospects for Organic Food in Ireland

This is the first in-depth report on the organic agri-food sector that has been undertaken in Ireland. The report draws on a new survey of Irish consumer attitudes to organic food, a survey of organic food producers and trade interviews. The report shows that consumers have a positive attitude to organic food, but high price premia make it less likely for them to purchase it. It also indicates that Ireland's growing market for organic food is being served mainly by imports and that the first challenge is for domestic production to increase to satisfy home market demand. It sets out a number of the key issues which presently face the Irish organic food industry, with issues and opportunities for Irish suppliers clearly presented. Production, consumer and retail issues are discussed in detail. A number of key conclusions and recommendations are outlined at the end of the report with the intention of capitalising on the growth in demand which is taking place.

b) Blueprint for Organic Agri-Food Production in the West (with permission from the Western Development Commission as the report has yet to be published).

The study brief was to review organic farming and food production in Europe and Ireland and to prepare an action plan for the development of the sector in the Western Region based on the research. The report contains an overview of the European and Irish organic sector together with a detailed analysis of organic production in the Western Region. Challenges for the Western Region are outlined in tandem with details of the supports required to develop the supply base.

Two separate research projects were undertaken to inform this report, one by the National Food Centre, Teagasc, on the market for organic produce, processing, distribution, research, training and advice and a retail store audit of organic price premia. Secondly Cera undertook a detailed survey of 103 organic farmers in the Western Region in order to assess aspects of production.

The report concludes with the Western Development Commissions perspective on how the organic sector should be developed in the Western Region. It sets out a regional framework, recommendations, actions and costings for the development of the organic sector and how they should be implemented to ensure the overall success of the organic industry in the Western Region.

c) A Report on the Organic Farm, Johnstown Castle, Production and Economics, 1990-1995

The purpose of the project was to investigate the levels of production, which could be achieved on the organic farm at Johnstown Castle, and the economic feasibility of this method of farming. The farm is run by Teagasc, the Irish state Agriculture and Food Development Authority, who conducted the study.

The report concludes with a summary of how the farm at Johnstown Castle was set up, including costs and income from 1993-1995. Economic comparisons of cattle and sheep production, of organic and conventional production and of the environmental benefits of organic and conventional farming set out the case for conventional farmers and agricultural advisers to seriously examine conversion to organic farming.

d) Organic Development Committee

The Organic Development Committee has been asked to recommend a coherent development strategy to achieve expansion in production, processing and marketing of Irish organic produce and to secure an increased share of the growing national and export markets. It will also consider the broad actions necessary for the long-term future development of the Irish organic sector by identifying

opportunities and measures for improved marketing of organic food and recommendations for effective promotion. In addition the Committee will identify priorities in the areas of research, advice, training and education. Following the deliberations of the Committee an action-oriented report is expected with targets.

- e) The Organic Sector in Ireland, A jointly produced consolidated report from the three EU/DAF approved organic certification bodies in Ireland, to the Department of Agriculture & Food, Organic Unit, Johnstown Castle, Wexford.

In November 1998 the three Irish Organic Certification Bodies (Bio-dynamic Agricultural Association In Ireland, Irish Organic Farmers' and Growers' Association Limited and Organic Trust Limited) presented a jointly produced report titled "*Preamble to the National Development Plan for Organic Agriculture*". This paper is the detailed support document to that report.

The report is divided into four distinct sections:

- i) Background to the development of the organic sector in Ireland; comparison with European developments and current status
- ii) Current management of the sector and proposals to improve via the implementation of a structured system of consultation between those involved in inspection and certification, and the Competent Authority, i.e. the Organic Unit of the Department of Agriculture & Food and the three approved organic certification bodies.
- iii) Proposals for the future progressive and pro-active development of the sector in Ireland through the application of funds under Agenda 2000 in specific areas. This section encompasses a broad spectrum of areas where the sector can be developed through educational, grant, ethos, attitude and other means on a national basis in Ireland.
- iv) The Rural Environment Protection Scheme (REPS) and in particular Supplementary Measure 6 (S.M.6) as it applies to organic production and recommended alterations to the current scheme (specifically the REPS booklet dated January 1st 1999). Additionally the previously titled OPARDF Grant-Aid Scheme - recommended re-structuring and scope of scheme.

A Summary of Recommendations is given at the end of the report.

2. SUBJECT AREA: ORGANIC MARKET INITIATIVES

- a) Market Study on Organic Products from Counties Tipperary, Clare Kerry
This study was carried out for the Tipperary, Clare and Kerry Leader groups as part of a four-year project to further develop organic farming under the LEADER programme in the three counties.

The main focus of the study was to assist farmers, wholesalers, processors and retailers to market organic produce, both locally and abroad. The local, domestic and exports markets are explored within the report as suitable channels for Irish organic farmers to market their products. Specific case studies are presented with practical suggestions on how to 'get started'.

The report was mainly a working document to be used by the participants involved in organic farming training course and information days, which were a major part of the project to develop organic farming in these counties.

- b) Messers, visionaries and organobureaucrats', dilemmas of institutionalisation in the Irish organic farming movement.

This paper asks what happens to 'alternative' social movements like the Irish organic farming movement, which try to promote sustainable forms of rural development, when they begin to be incorporated into state policy for farming and the countryside. Tovey in her own abstract says 'the Irish case discussed here is a starting point from which we may develop a more general

understanding of the increasing institutionalisation of environmentalism in the contemporary developed world'.

3. SUBJECT AREA: ORGANIC CONSUMER RESEARCH

a) An Analysis of the Market for Organic Foods in Ireland.

The objectives of this research were to investigate the consumer perceptions of organic food and perceptions at different stages of the marketing chain, including those of wholesalers and retailers. The study also estimated the premiums being obtained at retail level and identified what organic food products are available. It describes the market structure for organic foods, which was in place at the time of the study. In addition the organisation of the market and the size of the market were examined.

Consumer surveys carried out in Europe, America and Canada are reviewed which formed the basis for an Irish consumer survey.

The final chapter sets out a SWOT analysis for the organic market in Ireland and recommendations for those involved in the market.

b) Food, Environmentalism and Rural Sociology: On the Organic Farming Movement in Ireland.

This paper looks at organic farming from a rural sociology perspective. It examines the history behind the setting up and development of the Irish organic movement in Ireland as well as exploring the attitudes and motives which drive the key players in the Irish organic sector. The changing attitudes to agriculture both organic and non-organic are examined in relation to their impact on the social movements, state policy on agriculture and sustainable development.

c) 'Organic Food' Consumer Choice, Magazine of the Consumers' Association of Ireland.

The article focuses on what organic food means to today's consumer. An explanation of the term organic is given with a brief outline of the standards and regulations followed by organic producers and inspection agencies. Consumers are informed of how to recognise an organic product with a Table of organic certification 'codes' and 'symbols'. An organic price survey was carried out comparing the price consumers' pay for three different types of organic products. The final paragraph gives a summary of the findings of the Bord Bia Report 'Prospects for Organic Food in Ireland'. The article was timely in that a national debate on certification, standards and inspection had been ongoing for some months previously.

d) Consumer Guide to Organic Food

This directory of organic food producers and the products they produce was the first guide directed to the Irish organic food consumer. It sets out the reasons for farming organically with a description of how to recognise organic food in retail outlets. The entries in the directory cover farms, health food stores, wholesalers, restaurants, market stalls, retail shops/butchers, organic centres, Irish Guest Houses with Organic Kitchen Gardens in addition to a list of farms which take in students or others interesting in learning how to farm organically.

LITERATURE REVIEW

	Publication	Author	Source	Place of Publication	Time Period	Subject Area of Focus	Relevant Related Keywords	Rating of global Scientific Relevance
1	Prospects for Organic Food in Ireland	Bord Bia, The Irish Food Board	Bord Bia	Dublin	2000	Organic Market	National Investigation	1
2	Blueprint for Organic Agri-Food Production in the West	Western Development Commission	Western Development Commission		To be published 2001	Organic Market	Regional Investigation	1
3	A Report on The Organic Farm, Johnstown Castle, Production and Economics 1990-1995	F. MacNaeidhe, M. Lynch, W. Murphy, W. Fingleton and F. Codd	Teagasc	Dublin	1997	Organic Market	Competitiveness of organic versus conventional sector	2
4	An Analysis of the Market for Organic Foods in Ireland	Geraldine Roddy	The National Food Centre, Department of Agricultural and Food Economics	Dublin	1994	Organic Consumer Research	Consumer - perception Consumer - attitude Consumer - Behaviour	4
5	ECAD East Cork Area Development, Organic Farming - A Viable Option? (Feasibility)	ECAD	ECAD	Cork	2001	Organic Market	Regional Investigation	3

	Publication	Author	Source	Place of Publication	Time Period	Subject Area of Focus	Relevant Related Keywords	Rating of global Scientific Relevance
	Study)							
6	Organic Meat: EC Market Developments. A Study Prepared For The Irish Department of Agriculture and Food.	CBF	Bibliography of 'An Analysis of The Market For Organic Foods in Ireland'	Dublin	1991	Organic Market	National Investigation Factors driving or blocking demand Factors driving or blocking supply	5
7	Green Consumerism in Ireland - The Commercial Implications.	The Irish Goods Council	Bibliography of 'An Analysis of The Market For Organic Foods in Ireland'	Unknown	1991	Organic Consumer Research	(consumer) attitude	5
8	The Green Food Market - A Study of Consumer Attitudes to Green Food Products.	Michael Murray Unpublished BSc Dissertation	Bibliography of 'An Analysis of The Market For Organic Foods in Ireland'	University College Limerick	1992	Organic Consumer Research	(consumer) perception	5
9	An Investigation into the Potential Market for Organic Food in	University of Ulster at Jordanstown	Bibliography of 'An Analysis of The Market	University of Ulster at	1992	Organic Market	Regional Investigation	5

	Publication	Author	Source	Place of Publication	Time Period	Subject Area of Focus	Relevant Related Keywords	Rating of global Scientific Relevance
	Northern Ireland. MBA Thesis.		For Organic Foods in Ireland'	Jordans-town				
10	Dietary Concerns of Irish Consumers	O'Neill, F.K. and Shanahan, U.	Bibliography of 'An Analysis of The Market For Organic Foods in Ireland'		1991	Organic Consumer Research	(consumer) information	5
11	Consumers prefer Organic Taste	Ridley, Matt	Bibliography of 'An Analysis of The Market For Organic Foods in Ireland'	Meat Industry	July 1990 p. 17	Organic Consumer Research	(consumer) attitude	5
12	Market Research Report On the Irish Market for Organic Fruit and Vegetables, Milk and Meat. A Report prepared by Lianco Ltd., for Shannon Development and the Limerick Food Centre	A Report prepared by Lianco Ltd., for Shannon Development and the Limerick Food Centre	Bibliography of 'An Analysis of The Market For Organic Foods in Ireland' and IOFGA Library		1992	Organic Market Initiatives	Marketing & Supply Chain	5

	Publication	Author	Source	Place of Publication	Time Period	Subject Area of Focus	Relevant Related Keywords	Rating of global Scientific Relevance
13	A Study of Financial Implications of Converting to Organic Farming	Mary Lynch	Master of Agricultural Science Thesis submitted to National University of Ireland	Dublin	1995	Organic Market	Competitiveness of organic versus conventional sector	4
14	'Organic Food'	Celine Murrin	Consumer Choice Magazine of the Consumers' Association of Ireland. Dublin	Dublin	Jan 2001	Organic Consumer Research	(consumer) information Price Premiums	3
15	Consumer Guide to Organic Food	Shirley Cully	IOFGA Library	Dublin	1996	Organic Consumer Research	(consumer) information	4
16	Agri Food 2010, Main Report	Department of Agriculture, Food & Rural Development	Department of Agriculture	Dublin	March 2000	Organic Market	National Investigation Political	2

	Publication	Author	Source	Place of Publication	Time Period	Subject Area of Focus	Relevant Related Keywords	Rating of global Scientific Relevance
							Support Schemes for Marketing organic Products.	
17	Marketing Study on Organic Products from Counties Tipperary, Clare, Kerry	Agro Eco Consultancy	IOFGA/LEADER Project to Develop Organic Farming in the Counties of Tipperary, Clare and Kerry	Holland	1996	Organic Market Organic Market Initiatives	Regional Investigation Organisation	3
18	Food, Environmentalism and Rural Sociology: On the Organic Farming Movement in Ireland	Hillary Tovey Department of Sociology, Trinity College Dublin	Sociologia Ruralis 37, 1: pp.21-37	Dublin	1997	Organic Consumer Research	Consumer behaviour	4
20	'Messers, visionaries and organobureaucrats', dilemmas of institutionalisation in the Irish organic farming movement	Hillary Tovey Department of Sociology, Trinity College Dublin	Irish Journal of Sociology		Vol 9 1999	Organic Market Initiatives	Rural Development Organisation	3

	Publication	Author	Source	Place of Publication	Time Period	Subject Area of Focus	Relevant Related Keywords	Rating of global Scientific Relevance
22	Organic Agriculture in the Republic of Ireland	Willer, H and D. Gillmor.	Irish Geography 25, 2:pp.149-159	Dublin	1992	Organic Market	Growth of demand /supply	4
23	The Organic Sector in Ireland, A jointly produced consolidated report from the three EU/DAF approved organic certification bodies in Ireland, to the Department of Agriculture & Food, Organic Unit, Johnstown Castle, Wexford	Demeter Standards Ltd (BDAAI - Bio-Dynamic Agricultural Association in Ireland) IOFGA Ltd (Irish Organic Farmers' & Growers' Association) Organic Trust Limited	IOFGA Records	-	August 1999	Organic Market	Political Support Schemes for Marketing Organic Products	2

NOTES:

- A. At the time of writing April 2001, The Organic Development Committee as set up following the AgriFood 2010 Report (a report forecasting Irish agriculture to the year 2010), was in situ. When the Committee was established in November 2000, by the Minister of State at the Department of Agriculture, Food and Rural Development it was expected that the Committee would report to the Minister for Agriculture in April 2000. However due to the Foot and

Mouth Disease outbreak all meetings of the Committee were cancelled. No rescheduling of meetings has been announced at time of writing.

Rating of global Scientific Relevance	1
--	----------