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# Emerging Beef Producer Organisations (POs) in the Irish Beef Sector: An Analysis of Media Coverage in the Context of Nationwide Beef Producer Protests

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**Abstract:** International literature acknowledges benefits of the legally recognised Producer Organisations (POs). Successful leveraging of these benefits depends on two forms of cooperation: horizontal integration among the producers for more effective functioning of the POs; and vertical integration of POs with other actors in the production chain to facilitate processes of co-creation and interactive innovation. In 2016 PO legislation was first introduced in Ireland, and in 2019 Ireland's first two beef POs emerged at a time when primary producers in the beef sector mobilised *en masse*, protesting against poor prices and seeking changes in supply chain relationships. Throughout this period, significant and detailed media reporting of the beef sector surrounded the protests, which takes the focus of our analysis. Building on an existing but limited literature on institutional conditions in the Irish beef industry and international accounts of factors influencing the success of POs, we analyse media coverage in order to shed light on the nature of emerging new forms of horizontal and vertical cooperation. In this regard, we focus on horizontal integration of producers into PO and associations of POs (APOs); and vertical integration of POs into Inter Branch Organisations (IBOs) and value-based supply chains (VBSCs). Our analysis shows that the media representations of the Irish beef sector evidence significant challenges to the establishment and successful operation of POs, in any form. The analysis suggests that current constellation of relations in the Irish beef sector represents an environment that is partially resistant to horizontal co-operation and significantly hostile to vertical co-operation. Interactive innovation involving different chain actors seems not to be imminent, at least in the short term, unless there are strategic public and/or private interventions introduced to support it.

**Keywords:** Ireland; beef producers; beef protests; producer organisations; co-operative; horizontal integration; vertical integration; value chain



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## 1. Introduction

The beef sector represents the most significant component of agricultural production in the Republic of Ireland, with a share of 38.8% of total Gross Agricultural Output (GAO), which in 2016 was estimated at 6.92 billion [1]. Despite this large share of the sector, profitability of beef producers continuously ranks lowest within Irish agriculture with Irish beef producers heavily reliant on income from EU subsidies [2]. Moreover, beef producers' incomes have continuously dwindled in recent years to the point where just 11% of 'cattle rearing' and 26% of 'cattle other' farms are classified as economically viable in 2018 [2].

While the price of beef can, to a large extent, be explained with reference to market variables and related mounting pressures on prices of beef, the reduced economic viability of Irish beef producers has also been attributed to structural characteristics within the beef supply chain. These are noted to be marked by a considerable asymmetry of power in favour of processors and retailers [3,4]. This asymmetry is rooted in a highly fragmented sector of many small-scale farms on one hand and, on the other, a highly

consolidated processing sector, where four leading operators control 65% of the market share. Moreover, the chain is also noted to be characterised by a lack of transparency and a restricted flow of information from processors and retailers to producers: changes to specification requirements for supplied beef are often imposed by large processors and retailers, and unsuccessfully communicated [3]. Together, these disparities contribute to the creation of “dysfunctionalities” in the Irish beef chain [3]. Renwick argued in 2013 that the “dysfunctional” nature of the supply chain turned price pressure arising from supply and demand issues into a “crisis” [3].

Renwick’s observation was made in the wake of the 2013 “beef crisis” that emerged in response to low prices paid to beef producers, compared, for instance, to the UK average [5,6]. A similar crisis occurred at the end of June 2019 when, facing a substantial dip in income, Irish beef producers organised nation-wide protests and a prolonged campaign of blockades of processing facilities. The protests and campaigns revealed the extent of the conflict between primary producers and processors.

As Hooks et al. [4] point out, there has been a scant tradition of primary beef producers engaging in horizontal (with each other) and vertical (producers with other chain actors such as processors and retailers) forms of co-operation in the Irish beef sector. This stands in stark contrast to the dairy sector, which is the most profitable Irish agricultural sector in terms of farm-level income [1]. Ireland’s dairy sector, however, is the second largest sector and comparable to beef in terms of GAO, with an output of 29.5%. Unlike the beef production chain, the dairy sector is characterised by the historical presence of co-operatives and a high level of co-operation (both horizontal and vertical) among chain actors, and these features are identified as vital to the stability and expansion of the sector [7].

Benefits associated with the integration of primary producers into cooperatives or POs are widely recognised. For example, the International Cooperative Alliance (ICA) foregrounds the importance of cooperatives in achieving social justice for small producers, who become member-owners through participation [8]. The power of group action, or what is known as the “cooperative effect” [9], encompasses creation of economies of scale and increased bargaining power. The cooperative effect generates: added value, pooling of resources, control over the quality and prices of products, shortening supply chains between the producers and consumers, enabling knowledge sharing, and technological innovation and specialization. It also has the potential to develop wider aspects of producer communities, promote sustainability, and strengthen the political power of smaller producers because it unites their political voice [10,11].

Taking into account the international literature on co-operatives and POs as a means for increasing bargaining power and development of smaller primary producers [12,13], this paper takes a focus on prospective POs in the beef sector. At a policy-making level, the co-operative structure, both horizontally and vertically integrated, was proposed in Ireland as one of the avenues to address the power asymmetry [3], optimise the Irish beef chain [14], and improve beef farm viability. Although legal recognition of POs was extended to Ireland’s beef sector in 2013 under the Common Market Organisation (CMO) regulation 1308/2013 and legislated for in Ireland in 2016 [15], no PO emerged until 2019.

The impetus for the establishment of Ireland’s first beef POs was between June and September 2019 when, facing further price pressure, a wave of farmer-led protests and factory blockades swept through the Irish beef sector. Following the protests, POs emerged for the first time in beef farmers’ bids to redress inequalities in the industry. With a tradition of asymmetrical power relations in the Irish beef supply chain, how likely is it that POs will achieve the radical transformation of sectoral relations necessary for the success of the whole chain?

Assessing prospects for the establishment of beef POs in the Irish context, Hooks et al. [4] argued that the environment surrounding the Irish beef sector contains an underlying infrastructure that could facilitate the formation of POs and foster both horizontal and vertical integration. However, they also identified barriers that could prevent the formation of POs, citing power differences, member heterogeneity and lack of awareness of the

possibility and benefits of vertical partnerships, such as integration to value-based supply chains (VBSC) and IBOs, as chief concerns. Integrating insights from the existing (and limited) analysis on prospects for the establishment of POs in the context of the Irish beef chain, this paper focuses on assessing emerging forms of cooperation relevant to and necessary for POs' success.

Because the first two Irish beef POs were registered in September and October 2019, there is a lack of substantial data at this time on how these POs are currently operating. However, there has been unprecedented and detailed media reporting of the beef sector over three months of protests, shedding light on the nature of emerging relations among beef chain actors. Analysis of media coverage on beef protests and the emergence of POs allows us to access insights provided by mainstream agricultural commentators regarding events and changes in relationships at a time of flux in the Irish beef sector. This provides us with circumstantial evidence to assess the current foundations and future likelihood of successful horizontal and/or vertical co-operation of POs in the Irish beef sector. Our analysis is of interest not just in the context of the Irish beef sector where independent farmers make up a significant portion of the producer population, but also in the wider global context where small producers are facing significant economic challenges [16,17] that, in the international literature, can be potentially remedied by more extensive adoption of cooperative structures [13,18].

A contextual background to our analysis (Section 2) outlines conditions for the emergence of beef POs in Ireland and an overview of the international literature on POs. In Section 3, we present our methodology for the analysis of media coverage analysis. Section 4 presents the findings of our analysis under the thematic headings of barriers to horizontal and vertical integration in the context of Irish beef sector POs. Discussion and concluding remarks follow in Section 5.

## 2. Background

### 2.1. Catalysing the Emergence of POs: Turmoil in the Irish Beef Sector

At the end of July 2019, a significant segment of Irish beef producers, led by a grass-roots beef farmers organization, the "Beef Plan Movement". The Beef Plan Movement is an organisation of farmers focused on the transformation of the beef sector in Ireland to generate greater income for the beef producers. It was formed in October 2018 in the wake of the continuous decline of the prices paid to beef producers and a perceived failure of Irish mainstream farmer representative organisations to address long-standing issues of low rates of economic viability in the beef sector [19]. The Organisation was created through the use of social media platforms and has approximately 20,000 members (as of August 2019).

The Beef Plan Movement aimed to challenge the beef processing sector and organised a nation-wide campaign of factory blockades that resulted in a temporary closure of the processing facilities. Most protests were focused predominantly on the four most significant players in the Irish beef processing sector. Given the large market share of these four companies, which control 65% of country's processing facility [3] and 80% of exports [20], the blockades significantly disrupted the Irish beef trade for almost two months. Protesting farmers accused processing companies of using their strong market position to push down the price paid to producers arbitrarily either directly or via the imposition of specification rules. At that point, farmers were making a market loss of approximately €0.72 per kilogram of finished cattle (Irish Independent 09/17 p. 70), a situation that was economically untenable for Irish farmers. In response, the processors countered protesters' claims, citing poor international market conditions, falling consumer preferences for beef, and oversupply of beef as reasons for farmers' poor market returns.

As factory blockades progressed, several conflicts emerged at factory gates, with both sides accusing each other of threats and aggressive conduct. Moreover, the Consumer and Competition Protection Commission (CCPC) ruled that the factory blockades represented a "collective boycott [ . . . ] with the intention to force increase in prices" that may constitute

a breach of competition rules (CCPC in Irish Independent, 08/10 p. 10). Following two rounds of talks where the topic of prices paid to farmers was not allowed for discussion, farmers, dissatisfied with the lack of progress, returned to the picket lines. This time, however, the protests and blockades were without endorsement and co-ordination from the Beef Plan Movement or any other mainstream farming organisation. Several processors reacted by seeking court injunctions against individual picketing farmers. An gridlock of the Irish beef sector ensued and jeopardised processors' capacity to fulfil their domestic and international contracts (90% of Irish beef is exported). Extensive losses were experienced by processors whereby one of the four main companies reported losses of €1.5 million in turnover per day (Irish Independent 08/28 p. 14). Losses were also experienced by producer farmers who, reluctant to cross the picket lines, were unable to sell their livestock to factories. Farmers could also incur further costs associated with housing finished animals and the loss of bonuses because animals were growing out of quality specification criteria (Irish Independent 09/17 p. 68).

Attempting to defuse the situation, Ireland's Minister for Agriculture Fisheries and Marine, along with An Taoiseach (Ireland's Prime Minister), intervened and issued several calls for negotiation processes to begin, appealing to processors' corporate responsibilities and to picketing farmers' sense of solidarity with fellow beef producers unable to offload stock. However, several factors hindered the negotiation process. One was the refusal of factories to engage in negotiations until protestors suspended all pickets at plants. Later, processors conditioned their acceptance of an agreement by immediate cessation of farmers' blockades. Another hindering factor was that although the Beef Plan Movement instigated the protests, the organisation lost control over the picketing farmers, who re-entered protests in their private capacities. This made it difficult to suspend the protests in a coordinated way nationally to meet the processors' demand to resume factory operations. It also made it difficult to assure the protesters' unified acceptance of any agreement negotiated between the MII (Meat Industry Ireland—an association of Irish beef processors), the Beef Plan Movement, and other farming organisations. Third, it was stated by the Ireland's Consumer and Competition Protection Commission (CCPC) that the price paid to farmers could not be collectively negotiated legally because such a negotiation would constitute an infringement of competition rules according to the CCPC (Irish Independent 08/12). Because the central issue of the conflict was screened off the agenda for talks, it became difficult to convince the picketing farmers to stand down because they had no guarantee of discussions about possible price increases, which was the reason for resistance in the first place. With either side refusing to compromise, the situation resulted in a stalemate with severe consequences for the sector.

Facing increasing pressure in the sector, negotiations on price eventually did take place and, circumventing the topic of price, discussions focused on the factors that influence price in a distal manner. An agreement was reached, which included increases in the in-spec bonuses paid to farmers, promises of Quality Payment Grid review, development of a beef price index and offal price indicators, and a commitment by the Minister for Agriculture to establish a "beef market task force" that would increase transparency in the chain (Irish Independent 09/16 p. 2). While the deal was accepted by seven farming organisations and representatives of the processing sector, individual protestors refused to leave processing sites, and it took one more week of convincing before protestors, facing pressure from farming organisations, politicians, meat factories and fellow farmers, stood the pickets down in all processing factories.

Reception of the agreement among media commentators was mixed. Some commentators argued that commitments to establish the beef market taskforce, to review the quality payment grid, and to amend some specification bonuses represented a significant advance and the biggest review of the prices paid to farmers in more than a decade, a success hitherto not achieved by any farming body (Irish Independent 09/17 p. 103; Irish Independent 09/27 p. 75). Other commentators were cautious about the results of the negotiations. They highlighted how the revisions of the bonus payments, under best possible conditions,

would amount to an increase of €0.28/kilogram (Irish Independent 09/16 p. 2), a price that still leaves farmers selling their produce significantly below the cost of production. This media reportage suggested that beef farmers, even after all the protests, remained at the mercy of the processors (Irish Independent 09/24 p. 62).

The recent beef crisis and ongoing negotiations exposed the extent of the conflict between producers and processors, as well as the limits of producers' capacity to influence their position in the supply chain. Their protests were declared illegitimate by the CCPC according to anti-competition rules and processors used legal apparatus to prevail over the farmers. Moreover, the discussion of price was effectively screened off the agenda of the talks between producers and processors on the grounds of violation of competition rules guarded by the CCPC.

While it appeared that possibilities for further advancement of producers' interests regarding the price of beef were exhausted, the EU CMO regulation 1308/2013 offered one further avenue for action to the producers—the establishment of EU-recognised Producer Organisations (POs)—which can be exempt even from competition rules under certain circumstances. Even though Ireland legislated for POs in the beef sector in 2016, and POs were emphasised repeatedly as the means for rebalancing power in the Irish beef sector, none were established until the end of the beef crisis of 2019, when the first two recognised beef POs, *Glasson Beef Producers Limited* (established 11 September 2019) and *Emerald Isle Beef Producers* (established 4 October 2019), emerged in response to the institutional constraints placed on the price negotiation.

## 2.2. POs, APOs and IBOs as Means of Structural Transformation in Irish Beef Chain

A PO is “a producer-owned and controlled organisation” and “engaged in collective marketing activities” ([21] *italics original*). More specifically, it can be defined explicitly with reference to the CMO regulation, which legally recognises POs as any entity that has been constituted by and is controlled by farmers in a specific sector, formed on the initiative of farmers to pursue one or more of the particular co-operative and sustainability oriented aims listed in the point (c) of article 152 EU CMO Regulation 1308/2013 [22], (Paragraph (c) of article 152 lists a number of activities that fall in the purview of the recognised POs, ranging from production optimisation, marketing and promotion activities to initiatives enhancing sustainability and biodiversity (see <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=celex:32013R1308#d1686e9270-671-1> for complete list of activities)) and engaged in at least one of the following activities:

- joint processing;
- joint distribution, including by joint selling platforms or joint transportation;
- joint packaging, labelling or promotion;
- joint organising of quality control;
- joint use of equipment or storage facilities;
- joint management of waste directly related to the production;
- joint procurement of inputs;
- any other joint service activities pursuing one of the objectives listed in point (c) of this paragraph (EU CMO Regulation 1308/2013, Article 152 (29 December 2017)).

The international literature identifies many benefits associated with POs. While offering a full account of these is beyond the scope of this article, the literature is strongly suggestive that POs represent potential to benefit members in three broad ways. POs are known to enhance producers' bargaining position, not just with processors but with many agents operating up and downstream of the chain, to enhance farm productivity via co-operation, adding value and reductions in transaction costs and to support joint marketing which enables the POs and associations of producer organisations (APOs) to reach out through distribution channels they could not access individually. POs/APOs are also potentially beneficial for the entire chain in that they contribute to effective planning of supplies, stable prices and lower costs, safety and quality of supplies, locally sourced food chains and innovation (c.f. European Commission, Directorate-General for Agriculture and



Rural Development 2019, pp. 130–145 for detailed recent overview). Legally recognised POs and APOs have, under articles 152, 209 and 222 of CMO regulation, the advantage that they can, under certain conditions, collectively negotiate on price without breaching competition regulations. This attribute makes recognised POs and APOs especially relevant to the Irish context if it is considered that the issue of price was at the heart of the conflict.

Considering international evidence of potential benefits of POs, the PO structure has already been proposed as a potential means of transformation of relations in the Irish beef sector [3,14,23]. Reinforcing this proposition with a state-of-the-art review of the literature, Hooks et al. [4] pose POs as one of the tools for transformation of power asymmetries in the system and for tipping the incumbent political economy relations more in favour of the producers. While citing concerns in the literature which found that independent POs can fail to realise their objectives as buyers still retain the option to buy from outside of POs (e.g., [24]), Hooks et al. [4] point out, as a solution to this conundrum, that benefits of POs can be enhanced by further horizontal co-operation through APOs. APOs, as associations of multiple POs, add scale and bargaining power that is important for success because individual POs may lack the resources to achieve sufficient representation in the marketplace.

Focusing attention on current opportunities for the development of recognised POs and APOs in Ireland, Hooks et al. [4] identified several avenues producers could exploit. Leaving policy and institutional state-funded support aside, these opportunities mainly include existing producer networks, such as discussion and knowledge transfer groups which may stimulate further discussion of POs among farmers and provide an initial network for POs to emerge. In particular, the livestock mart system was identified not only as a potential vehicle for the establishment of POs and APOs due to its co-operative structure and national reach [4]. Despite this potential, the authors also identify significant challenges in the existing institutional setting, highlighting concerns over poor member commitment to the goals and strategy of emerging POs. And, more significantly, processors' engagement with POs is premised on their current context characterised largely by oligopsony, unless the POs/APOs control a critical share of the market. Interview data presented by Hooks et al. [4] raised concerns that processors could actively resist and destabilise emerging POs or APOs.

Research also suggests that increasing scale may not be enough for POs to succeed [25] and the benefits of co-operatives might be necessarily enhanced by the pursuit of vertical integration and value-added strategy [26,27]. Traditionally, POs and other co-operative entities have involved horizontal co-ordination between primary producers in achieving scale and bargaining power in opposition to different categories of actors in supply chains. However, over the last two decades, the international literature identified a trend in shifts in POs' functions away from oppositional relationships with other value chain actors towards much more vertically integrated and co-ordinated partnerships that bring primary producers together with other actors in the chains [28,29]. This shift is occurring in response to modern market transformations, which are marked by increasing product differentiation and consumer demand for products with closer connections with primary producers [30], as well as by the efforts to improve efficiency and reduce transaction costs of interactions between chain actors [31]. If functioning correctly, closer connections between chain actors can, in theory, result in an overall improvement and increasing returns for all actors involved in the production chain [32,33]. Furthermore, the process should enable co-creation of new value-added products which rests upon the capacity to mobilise the combined resources and expertise of different actors in the production chain.

These advantages informed the decision to incorporate the institution of Interbranch Organisations (IBOs) into the EU legislative apparatus [34]. IBOs are defined by formalised collaborations between primary producers and other chain actors, such as processors, retailers, and distributors to enhance the viability of the overall chain rather than to privilege particular actors [35], which are enshrined under the articles of 157 and 158 of the EU CMO Regulation 1308/2013 [22]. Therefore, much of the contemporary literature on

POs focuses on the importance of vertical interactions and integration into value-based supply chains (VBSC) which aim to integrate producers with other actors in the production chain (e.g., processors, retailers and consumers) with the aim to share knowledge, increase productivity & innovation and add value to the products in the marketplace, while maintaining the “commitment to the welfare of all participants in the value chain, including fair profit margins fair wages and business agreements of appropriate extended duration” [36]. VBSCs are identified as a potential means of enhancing viability across food chains [37–39].

The importance of POs’ integration to Inter-Branch Organisations (IBOs), along with the integration of producers into VBSCs [40] was highlighted by Hooks et al. [4] who, developing upon international evidence, posits vertical integration and value-adding strategies through co-creation as a possible route to improve the sustainability and return of Irish beef producers in tandem with the establishment of POs and APOs. Assessing initial conditions for the pursuit of these strategies within the parameters of the Irish beef production chain, the authors identified for vertical collaborative arrangements as potentially conducive to the establishment of recognised IBOs. Moreover, they argue that Irish beef already has several attributes that are highly desirable from the perspective of market differentiation (small farm-bred, grass-fed) that are safeguarded by the internationally recognised schemes such as Bord Bia Quality Assurance (QA) and Origin Green. These differentiators represent “untapped potential in an evolving market where quality attributes are increasingly sought after by consumers” [4]. These attributes currently translate into an initiative to establish Irish grass-fed beef as a Protected Geographical Indication product since August 2020 [41]. However, despite the existing institutional framework where POs have been newly legislated for in Ireland, the authors identified stakeholders’ inadequate knowledge of potential of product differentiation, lack of policy awareness of the possibility to integrate POs horizontally into APOs, and lack of awareness of the vertical integrations involved in IBOs.

### 2.3. Relational Challenges to POs, APOs and IBOs

Despite numerous benefits of horizontal co-operation and vertical integration highlighted in the literature, POs often do not engage with buyers. Focusing attention on the relational aspects of the respective actors in the value chain, Bijman (2018) identified an array of factors that prevent POs’ realisation of their joint interests within a horizontal structure, and in the context of vertical integration of POs’ with other chain actors.

Horizontal challenges to POs’ efficiency include lack of member commitment, which is defined as the extent to which producers “can be induced to maintain loyalty in a voluntary organisation when faced with a volatile market, climate change and new technologies” [29]. Member commitment has been identified as central to the health of the organisation insofar as the co-operatives depend on their membership for efficient operation [42]. Factors that were positively linked to member commitment include geographical proximity and face-to-face interactions [40,43], identification with the organisation through a shared identity, perception of the ownership and having a voice within the co-operative as well as the perception that the co-operatives are working towards the interests of their members [43,44]. Member commitment may be negatively impacted where they make financial contributions to capital investment over which they feel that they do not have control.

Weak leadership capacity of the directors (board members) and managers has been recognised as central to the long-term success and sustainability of co-operatives in agriculture for some time [45]. Operating in modern market conditions and changing functions of POs effectively entails the continuous diversification of skills and capabilities required from the agents responsible for leading the co-operative, in areas such as marketing, financial management, legal and accounting literacy and strategic planning. The capacity to negotiate and build alliances was the hallmark of leadership in the more traditional co-operatives and remains critical in contemporary co-operatives [29,46]. Even though effective leadership has been linked to positive outcomes for co-operatives [47–49], finding good leaders and effective managers continues to pose an issue for many co-operatives [31].

The potential drawbacks of member heterogeneity, whereby different members have different resources, needs, views, agendas and expectations about their role and commitment to a co-operative or PO, is highlighted as a challenge in the literature [18,29]. Heterogeneity poses a challenge to internal governance because it renders the decision-making process less effective as it increases the influence costs [50] and internal governance and control costs as diverse members might have to overcome conflicts before they can reach decisions [29,51]. High member homogeneity has been positively linked to the success of POs [42] and high member heterogeneity was identified as leading to reduced member satisfaction [40], hampered commitment to POs, and reduced compliance with quality requirement products supplied by producers to POs/cooperatives [52].

This last point, compliance of members with quality standards of POs, has been repeatedly highlighted as a challenge in the international literature on POs in the food and vegetable sectors [13,31,53]. In many cases, some PO members have difficulties in complying with maintaining the quality of the product required for successful operation of POs. This may come about either as a result of information asymmetry or lack of access to economic resources necessary for maintaining quality standards [12]. Or, poor compliance may come about as a result of a “free rider” effect whereby some individual members, while benefiting from the collective effort of the members to maintain quality standards agreed on the level of the POs, might be reluctant to invest time and resources into improvement of quality of their product [29,54]. Inconsistency in quality has been associated with reduced performance of POs as it negatively impacts their bargaining positions with other market actors [35,55]. This can have a negative impact on trust among members, and their satisfaction and commitment to the POs [40,43].

Moving on to the level of vertical integration, the literature identified several factors that can hinder co-operation between POs and other chain actors, such as buyers. First, POs can misunderstand the interests of other actors within the chain. Here, research on transaction costs argues that while the POs and other actors in the chain are engaged in a perennial conflict over price, they also have much to gain from vertical integration, as it benefits both sides through reductions in transaction cost and greater information sharing, quality management co-innovation and logistic efficiency. Yet, those opportunities often go unrecognised by either POs or buyers [31].

Even if potential partners recognise the advantages of vertical integration, there might be a lack of willingness to take risks associated with the development of vertically integrated chains. Farming tends to be a high capital and low margin enterprise, which does not allow for excessive risk-taking at the levels of individual producers or even smaller POs. While some actors further down the production chain might be willing to engage in the vertical integration and possess the necessary economic capital, many smaller farmer organisations cannot, or do not want to, take risks associated with vertical integration [31].

Another barrier is the lack of technical support for farmers who might otherwise be willing to establish vertical co-operation, but do not have access to the required information or technology that would enable them to innovate at the levels required by buyers (Bijman 2018). The provision of technical support to farmers by the downstream buyers is linked to successful operation and increased returns of the entire chain [12], and is identified as critical by recent overview studies on the functioning of POs in the EU context [13,18].

Another barrier to vertical integration is asymmetry in existing power relations, defined in the agricultural supply chain literature as the “ability to direct or influence the behaviour of others” [30]. Power asymmetries are recognised as a significant obstacle to vertical integration as the objectives of would-be vertically integrated actors can clash on the issue of price paid/received in transactions [31]. When thinking about supply chains, it is essential to remember that the ultimate goal of any business is the appropriation of value and the actors operating in the chain will attempt to act strategically in pursuit of this goal [56]. In order to understand barriers to vertical integration the development of supply chains must be understood as underpinned by factors influencing their effectiveness of their operation and also the varying power held by different actors in the chain [56]. While



there are numerous benefits of vertical integration between POs and buyers, integration also involves a concession where bargaining positions are concerned [31].

The issue of power is closely related to the issue of dependency—some small-scale POs on one side may be dependent upon other actors in the chain (e.g., processors) when they are unable to connect to consumers directly. Furthermore, buyers may not depend on POs for sourcing produce that can be obtained elsewhere [31,56]. Moreover, even if POs do vertically integrate with stronger actors down the production stream, research suggests a possibility that they can be exposed to exploitation. For example, a study of integration of a beef producer group into a VBSC with a retailer resulted in a disproportionate dependence of the PO on this single retail actor, who was then able to exercise significant control over the decisions of the entire chain, leading to member dissatisfaction and undermining the integrity of the co-operative for members [37,40].

Research also highlights issues of trust and path-dependent relationships among chain actors as predicated successful vertical co-operation [31]. High levels of trust among interacting agents were shown to facilitate more effective co-operation, information sharing, access to resources and interactive innovation, operating as “relational glue that enables or constrains both formal and informal social interactions” [57]. Trust affords participating actors a degree of predictability regarding the outcomes of their interactions. High levels of trust may even act as a substitute for formal contracts in contexts where these are not legally enforceable [58]. Inversely, low levels of trust among the participating agents were linked to faltering performances of POs as well as to reduced levels of member commitment and satisfaction with the co-operatives [59,60]. Moreover, the relationships among actors of trust do not exist in a vacuum, but emerge in an already existing social context [61,62]. Bijman [31] argues that the existence of previous conflict, grievances or latent ire negatively influences the trust among actors in the prospective chain, leading to a failure to establish successful vertically integrated chains. Where pre-existing trustful relationships among agents do not exist, they must be proactively established and deliberately fostered if the cooperation among chain actors are to be effective [57,63]. This can be achieved by an introduction of participatory approaches into the group or by engagement of mediating agents capable of the development of trust [57,61,64,65].

Although not explicitly discussed as a challenge to vertical integration by Bijman [31], the literature has identified a lack of stakeholder awareness of possibility and benefits of vertical integration with other actor chains. A recent EU study on POs in the context of the beef, olive oil and crops sectors found that roughly half (49%) of currently non-recognised producer cooperatives in beef, crops and olive oil sectors are not aware of the possibility and benefits of legal recognition under the PO legislation [18]. Several other studies indicate even lower levels of awareness of the possibility and benefits of further integrations of POs into APOs, IBOs or VBSCs [4,35,53].

### 3. Materials and Methods

This study is based upon a qualitative analysis of newspaper coverage of the Irish beef sector in the Irish Independent, Ireland’s best-read daily newspaper with an average daily circulation of 112,502 copies sold nationwide [66], during the period of protests occurring between July and September 2019. This newspaper was selected for analysis because in addition to being Ireland’s best-read newspaper, it is the only daily nationwide broadsheet publication that consistently covered the issue of interest on a daily basis for the entire duration of the beef producers’ protests. Moreover, the Irish Independent also features a weekly dedicated farming section (Farming Independent, 20–50 pages) that provides editorials, in-depth feature articles, columns and manifold opinion pieces on current issues in Irish farming. This combination of continuous daily newspaper coverage of the events alongside dedicated specialist journalism pieces constitutes the most comprehensive printed account of the 2019 beef producer’s protests in a single publication, which forms the basis of our analysis. While there are publications targeted at the farming population uniquely, we were interested in how the issue of the beef protests, an issue of national

concern, was represented in a national broadsheet, to the general population, with a high national readership.

The newspapers were accessed via the Irish Newspaper Archives (<https://archive.irishnewsarchive.com/>). Every issue was manually examined page-by-page to identify any articles related to the beef sector, and the items were saved in PDF format for further analysis. The second phase involved sorting through this material to identify the articles relevant to the research question and exclude the rest. The criteria for inclusion of the articles were references to the issues of ongoing beef producers' protests, crisis in the Irish beef sector and the relationships among beef producers and between beef producers and other actors in the chain. This effort yielded 184 newspaper articles pertinent to the research question—the issue of beef protests, crisis in the beef sector and relationships between processors and producers, which were then imported to QSR International's NVivo 12 software for further analysis.

The overall analytic strategy for the study was based upon the theoretical, or theory-driven, thematic analysis as described by Braun and Clarke [67]. The thematic analysis involves searching for and identification of themes. A theme:

*“... captures something important about the data in relation to the research question and represents some level of patterned response or meaning within the data set. ... Furthermore, the „keyness“ of a theme is not necessarily dependent on quantifiable measures—but in terms of whether it captures something important in relation to the overall research question”.* [67]

Thematic analysis can adopt two distinctive forms. Exploratory research seeking detailed descriptions of the entire datasets without specific theoretical or empirical research questions may use an inductive analysis that allows for the emergence of the key themes across the whole dataset, thus, giving the audience a comprehensive overview of all the recurrent themes occurring in the data. By comparison, theory-driven thematic analysis tends to be much more focused on specific aspect(s) of the dataset guided by the researchers' theoretical interests, while paying less attention to themes unrelated to the research question in the overall dataset [68]. Considering that the focus of this paper was guided by an explicit interest in barriers to successful horizontal cooperation on the level of POs and vertical integration of POs with processors in the Irish beef sector, we prioritized a deductive analysis strategy that used the discussion of barriers in the previous section to sensitise the analysis.

The analytic process itself involved the iterative cycles of data coding, analysis, thematic aggregation, clarification and re-coding as described by Braun and Clarke [54]. The dataset was initially read through in detail before engaging in open coding for any aspects of the texts the researchers considered of relevance to the topic of interest. At this stage, while focusing on the elements of interest (rather than coding the entire dataset with an equal focus), the codes were kept as close to the original texts as possible. This process was followed by the aggregation of the initial codes into emergent categories based on similarity and relevance to the research question. The emergent categories were then examined in detail and, using the analytical strategies of abstraction, subsumption, polarisation, numeration and contextualization, integrated into a series of themes sensitised by the conceptual discussion of the challenges to horizontal and vertical integration outlined above. Then, the entire dataset was re-read against this set of themes in order to identify any relevant information of relevance that might have been missed in the initial coding cycles and to establish correspondence between the themes and the wider dataset. Together the analysis process yielded several themes that mirror the discussion of the barriers to success of POs and are described in the findings section below.

## 4. Findings

### 4.1. Horizontal

#### 4.1.1. Weak Leadership Capacity

The leadership and representative capacity of beef farmers, and their existing representative organisations, were thrown into question during the protests. The newspaper reportage and commentaries portrayed the farming community as fragmented with several organisations competing to represent the interests of the sector. In the initial stages of the blockade, the protests, while supported by many individual representatives of the farming community in a private capacity, were not endorsed by any of the pre-existing main farm representative bodies apart from the newly emerged Beef Plan Movement. According to media commentators, the situation resulted in an impasse that weakened the capacity of the sector to negotiate, and it was stated that farm organisations must unite if they were to improve the position of the Irish beef farmers and face the threats of market upheavals to livestock farming in Ireland.

*“Farm leaders need to stop bickering and present a united front”.* (Irish Independent 07/30 p. 58)

Several commentators also pointed out that the beef farmers are, due to low incomes, considered a “poor relative of farming” (Irish Independent 08/05 p. 63), or a marginalised group within the farming sector, the interests of whom have been side-lined in the agenda of broader farming organisations that favour more profitable farming systems. They further argued that an unwillingness by mainstream organisations to support beef farmers was behind the formation of the Beef Plan Movement in October 2018, described as a splinter group intending to represent the marginalized interests of beef farmers. The Beef Plan Movement mobilised mainly through social media, where farmers communicated via communication forums such as *WhatsApp*. Some media reportage drew attention, particularly in the movement’s initial stages, to its lack of political experience, funding, and formal organisational structures.

Associated with these perceived organisational and funding deficits, media narratives questioned the leadership capacity of the Beef Plan Movement, stating that the movement could not “control” its members. This concern transpired in practice when picketing farmers refused to leave factory blockades even though the movement’s representatives advised them to stand down so that negotiations could place. This indicated further difficulties, because even if agreement between movement leaders and processors were reached, movement leaders could not guarantee acceptance by its members. Leadership capacity within the sector was further undermined by splintering of the group of picketing farmers away from the Beef Plan Movement as the crisis progressed, and the establishment of another group—Independent Farmers of Ireland—representing picketing farmers.

Although pre-existing main farm organisations, such as the Irish Farmers’ Association (IFA) and others, did not formally endorse the protests through the crisis, their representatives expressed solidarity with the beef farmers and were able to come to an agreement and act together in the final negotiations. According to media reportage, this unity separated the Beef Plan Movement and farming organisations on one side and picketing farmers, who refused to accept the negotiated outcome, until a week later.

#### 4.1.2. Member Heterogeneity

Media commentators repeatedly pointed out that the protesting beef farmers pursued a common goal, the core of which was an increase in returns on their produce. Media commentators, by and large, supported this goal and highlighted that this could not be achieved unless negotiations on price were possible.

*“Someone else may want a grid overhaul a lowering of the base grade, or an increase in the number of movements, or raising of the 30-month limit, etc. With such disparate wants, where can common ground be found?”* (Irish Independent 09/10 p. 62)

*“At this stage, I’m not sure the Beef Plan Movement itself knows what will appease the increasingly frustrated protesters”.* (Irish Independent 08/09 p. 8)

From our analysis of media reportage, it was clear that farmers were presented as heterogeneous in their demands but also in their approaches to protests. Examples of disunity in protesters’ approach were profiled in reports of the Tullamore Show (Premier Livestock Show in Ireland, this annual event attracts breeders of quality cattle and sheep from all over the country and garners considerable attention from the Irish farming community) whereby one faction of protesting farmers called for the request to withdraw the invitation to the Minister for Agriculture Food and Marine to attend, another group called for protests at the show, and another called for boycotting the show altogether (Irish Independent 08/09 p. 8). Furthermore, in the approach towards blockading the factories during the visit of trade auditors from China, who were scheduled to inspect the processing facilities in order to approve their access to market in the Peoples Republic of China, protests at some plants (Cahir and Grannagh) did stand down to allow the trade inspection, but protests in another plant (Bandon) did not (Irish Independent 08/30 p. 8).

As the crisis intensified and individual factory pickets went on without the support of some farming organisations, media reportage highlighted emerging tensions between picketing farmers and other beef producers who were not protesting but did not want to cross the picket lines either. The argument widely presented in the media was that the minority of picketing farmers were, in effect, speaking for themselves without a mandate from the wider community of beef producers. Moreover, they were portrayed in media reportage as interfering with the livelihoods of producers dependent on selling their livestock at a particular age, to avoid receiving less payment. In such a context, media commentators argued that support for picketing farmers was dwindling rapidly. It was reported that the majority of farmers wanted factory business to recommence, with strong potential for conflict as the farmers with livestock to process could have clashed with picketing farmers, revealing a division and tension between full-time beef farmers whose income depends solely on beef production and part-time producers who keep livestock in addition to off-farm employment. This tension might have, according to the commentators, translated into further mistrust and lack of support among those two cohorts of producers.

#### 4.1.3. Compliance with Quality Requirements

When it comes to the issue of compliance with quality requirements, the newspaper coverage presents a consensus on the fact that Irish beef conforms to very high-quality standards. This is attributed to the lower stocking density and grass-based system of production that is characteristic of the Irish context. Media commentators argued that Irish beef is produced to high quality standards and its production ranks among the most environmentally friendly and carbon efficient production systems in the world. This claim was further used to argue that the higher price farmers demanded for their product is not a demand for a handout, but an attempt to secure a fair price for their premium product.

*“The excellent reputation Irish farming has for quality produce comes at a price and the simple reality is beef farmers are not getting a just reward for their labour”.* (Irish Independent 08/17 p. 32)

These claims were often coupled with the argument that at least part of the blame of the beef producers’ situation can be attributed to the fact that despite product attributes that are highly attractive for the consumers (such as grass fed, low intensity, environmentally friendly, of good eating quality etc.), Irish beef was not yet established and marketed as a “premium brand” at the international level. This failure was laid at the doorstep of successive governments and other actors responsible for devising marketing strategies for Irish agriculture (Irish Independent 07/30 p. 61).

*“The issue is why, after a generation are we not a premium brand? ... The reason is simple. Those who devise the marketing strategy for Irish farming have not done enough to convince French, German and British consumers that the Irish product on*

*their supermarket shelves is the only product worth having*". (Irish Independent 08/20 p. 91)

Overall, the newspaper coverage evidences an overwhelming consensus that the quality of the product is not an issue in the Irish beef sector, even if its international promotion may be. And therefore, the compliance to the quality requirements should not pose a barrier for the functioning of newly emergent POs.

#### 4.2. Vertical

##### 4.2.1. Lack of Trust and Previous Relationships

Newspaper coverage agreed on the severity of antagonism and lack of trust between the two sides—producers and other chain actors. This antagonism and lack of trust was identified as partially rooted in the past and stems from the fact that the farmers saw a significant reduction of their income from factories in recent years (a situation the processors justified with reference to market conditions). From farmers' perspectives, throughout the same period, processors kept increasing profits, which led to several smaller protests in the beef sector. This caused producers to mistrust processors. Media reportage also highlighted a lack of transparency in the beef chain (regarding, in particular, how and the extent to which profits were made) as one of the factors influencing the trust between the two sides.

Second, antagonism and lack of trust were evidenced in conflicts marked by mutual accusations of illegal conduct, threats and even violence, which formed a focal point of the interest of media reportage throughout the crisis. Protesters claimed that they have been subject to intimidation from factory-related hauliers, which went as far as causing two injuries to picketing farmers (Irish Independent 08/03 p.3; 08/06 p. 52) and allegations of haulier trucks driving at the protesters (Irish Independent 09/03 p. 58). Processors' claims of intimidation of factory staff, vets and farmers that passed the picket lines included property damage, physical confrontation, and blackmail, according to media reportage.

There were mutual accusations evident in media reportage, with both processors and producers claiming that the other was driving the industry into crisis. Processors argued that the farmers' blockades were severely damaging the Irish beef trade as it impeded capacity to fulfil international contracts. The beef producers argued that if the prices paid to farmers do not cover the costs of production and yield margins, there will not be any beef trade anymore, at least not in the sense of widespread traditional beef farming that is characteristic of Ireland, a concern shared among the majority of commentators.

As portrayed by media reportage, processors exacerbated the conflict by attempting to force the protesters off the factory gates using legal means. Processors "threatened" and later issued legal injunctions against particular protesters and threatened to sue the representatives of the Beef Plan Movement for the loss of income (amounting to €1.5 million per day in the case of one of the large processing companies). This move was strongly denounced by farming organisations, farmers and commentators as an attempt to strong-arm the protesters, and provoked increased activity on the picket lines.

As the crisis continued, relationships deteriorated as both sides alternately broke off the negotiations. Echoing the Minister's use of the word "toxic" to describe the atmosphere and associated metaphors such as "freezing point", "battle" and "entrenchment", media commentators agreed that ongoing conflicts damaged trust between farmers and processors (possibly beyond repair) and transformed their relationships into antagonism bordering on open hostility, and leading to an existential threat to the sector. Moreover, commentators argued that tensions and mistrust that surfaced during the crisis were bound to be carried forward into the future.

##### 4.2.2. Differences in Dependencies

*"If nothing else, the current beef dispute brutally exposes the wholly unacceptable dependence of Irish beef farmers on just a handful of beef processors for the sale of our cattle."* (Irish Independent 09/17 p. 68)



When it comes to dependence, newspaper coverage portrayed the difference between beef farmers and processors as one of significant asymmetry. This asymmetry is rooted in the configuration of the Irish beef chain whereby a large number of producers depend on a small number of buyers for selling their product, a situation of oligopsony on the level of producer–processor interactions.

While farmers do not have many options when it comes to offloading their produce, the processors (buyers) are considered capable of sourcing cattle for processing from other sources, such as their feedlots or the dairy herd and offshore facilities. These alternative sources, combined with the control over the large portion of the processing sector, means that the balance of dependency weighs heavily towards producers as processors are much less reliant upon individual farmers on their operations. This situation was further aggravated (for farmers) by the perishability of their product as the cattle had to be processed within a particular timeframe. Otherwise, it would go out of specification, and the farmers would lose money.

*“The worst-case scenario in any business is not poor prices or tariffs—it’s having nowhere to go with your product, and it’s even worse when that product is perishable”.* (Irish Independent 09/25 p. 75)

An inability to sell their cattle did not only lead to loss of bonuses for the producers but also increased costs as they were required to house and feed animals further, intensifying the dependency further. This became a problem during the blockades when the spell of bad weather forced producers to house their cattle and switch from grazing to feed, incurring extra costs without the prospect of offloading their animals. This in turn heightened tensions between the protesters and other producers with stock to sell. Moreover, media commentators argued that it was not just producers who were dependent on processors, but also a whole chain of additional trade and services upstream from the primary producers who depend on producers’ income, thus giving the processors further leverage over the chain.

*“The factories control the tap that supplies the money that circulates. Turn that tap off and the money stops”.* (Irish Independent 09/19 p. 109)

Media commentators argued that, over time, the processing sector had become much more consolidated in the hands of four dominant companies (controlling 65% of the processing market), concentrating significant power over the industry into the hands of a few powerful, multi-national and multi-million industry actors (Irish Independent 09/10 p. 62; Irish Independent 09/17 p. 68). This consolidated power of the processors stood in stark contrast to many predominantly small-scale beef producers whose representation became increasingly fragmented over the same time. This is a situation that most media commentators blamed on a long-term failure of successive governments and mainstream farm organisations to address the issues that have been evident in the beef chain for years.

#### 4.2.3. Power Differences

When it comes to power differences, our analysis of media coverage presents a picture of severe asymmetry of power between the beef farmers and processors that is heavily in favour of the processing sector. Implicitly, acknowledgement of the processors’ power can be inferred from the way that even though the protesters did bring the beef industry to a standstill, the newspaper coverage depicted processors as the key actor in the conflict, maintaining the focus on their response to the farmers’ pickets and the options they had at their disposal responding to the crisis. Thus, processors are presented as firmly in control of the producer–processors relationship.

*“Whatever the answer, very little happens without the big businesses thinking it out well in advance”.* (Irish Independent 08/20 p. 86)

The explicit acknowledgment was prevalent in the commentaries where it was argued that processors are entering the conflict with an upper hand and significant capacity to exercise power over individual farmers, even if they congregate in large numbers

(Irish Independent 08/22 p. 11). The commentators argued that processors' determination in entering the conflict is borne out of decades of being used to "having their own way" without any significant challenge from successive governments or established farming organisations.

This power manifests primarily through the capacity to control the price paid to farmers, as was unilaterally acknowledged in the newspaper coverage. Here, the producers were presented as "price takers" (Irish Independent 08/22 p. 10) who are entirely at the mercy of the processors and other actors in the beef supply chain. They do not have any means to negotiate the price for their product and must take what is offered if they want any return (not to be confused with a profit margin) on their product. The commentators argued that the processors have used international beef market fluctuations and instability to justify the reductions in the price paid to farmers, yet they continued to make a profit and even expand to the point they could consolidate further during the same time.

The capacity to influence price was so extensive that farmers' returns have, over time, reached the point where it is driving farmers out of business. Farmers' profit margins dwindled to the point where EU subsidies could not make up for the difference. The asymmetry of power generated by differential access to resources was also manifested in the fact that the beef processors were able to commit considerable resources (estimated between €250,000 and "millions" in legal fees, Irish Independent 09/03 p. 59) to secure legal injunctions in attempting to have the picketing farmers removed from the processing plants.

*"But for now, while a smaller number of protests continue, the High Court injunctions have given the factories the upper hand and will probably be the stick to beat farmers from the gates."* (Irish Independent 09/03 p. 58)

The asymmetry of power was also embedded at the level of structures, or rules of the game, maintained by the institutions set up to be impartial, independent and protective of quality and market environment, but their impartiality became challenged in the protests. Repeatedly mentioned examples included Bord Bia specifications and the QPS grid, the commentators, following the statements of representatives from the farming sector, converged on the assertion that some of the specification rules used to grade meat and either pay bonuses or reduce the price have been arbitrary, rather than objective, and used by the processors to influence price. In media reportage, arbitrary mechanisms of price were identified as the rule that the slaughtered animals must be under 30 months old, the rule that animals have to stay in the farm for 70 days in order to qualify for the Bord Bia quality assurance and the rule that animal cannot be moved from farm to farm more than four times. After it transpired that *Lidl Ireland* and *Tesco UK* did not have an issue with buying beef that was slaughtered at 36 months, media commentators, as well as farm organisations, challenged the rule and questioned the neutrality and objectivity of Bord Bia (Bord Bia is the Irish Food Board, the aim of which is to "bring Ireland's outstanding food, drink and horticulture to the world, thus enabling growth and sustainability of producers"—further information available at: [bordbia.ie](http://bordbia.ie)). The QPS Grid and specification rules also constituted some of the few points of concession by the processors in the final negotiations.

The second aspect of structural asymmetry of power concerns the capacity of the conflicting sides to negotiate on the main point of conflict—the price of beef was precluded by the Irish Competition and Consumer Protection Commission (CCPC). The CCPC enacted structural bias in a way that favoured the processing companies in two ways, by declaring the collective protests as an attempt to force an increase in price of beef through collective boycott and second by structurally constraining the terms of the negotiations by taking the issue of the price of beef off the agenda of the negotiating process. In the wake of this move, the CCPC was criticised by producers and commentators as heavily biased against the beef farmers' interests. At the same time, media commentators argued that the commission was very lenient with the beef processing sector and allowed the consolidation of the processing sector into the hands of a few powerful actors (one of them controlling more than 25% of the processing market share) over previous years.

And finally, the power asymmetry between the producers and processors can be gleaned from the outcomes of the protests. Here, media commentators argued that, while changes to grid specifications and agreement to set up the beef taskforce constituted concessions from the processors that can be considered significant (to some extent), the crux of the conflict was price, which was not addressed, and the concessions would not generate enough return for farmers to cover the cost of production.

## 5. Discussion and Concluding Remarks

Despite international evidence highlighting benefits of POs, 2016 legislation for the establishment of POs was not utilised by beef farmers until after the 2019 beef crisis, when there was an escalation of conflict between producers and processors. It is likely that the deep power imbalances that have characterized the sector longitudinally, in particular the chasm between a highly consolidated processing sector and a fragmented primary production sector, have hampered the institutional embedding of POs or other cooperative organizations in the Irish context. Ultimately, horizontal cooperation involving primary producers requires organized unity among them, and vertical cooperation between producers and processors is aided by a history of collaboration. Neither forms of cooperation are established in the Irish context, which has implications for the types of solutions that have been historically promoted by producers, processors and other actors in the beef chain and for how Irish beef policy has been formulated. Put simply, in a context where there has been little or no horizontal or vertical cooperation, the potential of cooperation has remained underemphasized or overlooked over time. The lack of agency of beef farmers and the absence of a dedicated representative organization has hampered the pursuance of seemingly logical approaches to addressing power imbalances, such as the acquisition of farmer-owned processing facilities. New policy supports to assist farmers to become more empowered agents in the beef chain are likely to emerge in response to POs emerging for the first time in 2019. These should include not only supports to directly aid the establishment of POs, but ancillary supports for activities such as collective grazing, collective waste management, and the building of collaborative partnerships for innovation. Such policy supports are directly in line with EU initiatives, such as EIP-Agri and the European Farm to Fork Strategy [69].

There is a lack of knowledge of the current and future operation of POs in the Irish beef sector. Considering that novel organisational structures such as POs do not emerge in a vacuum, but in the context of new knowledge and already existing relationships [62], it is possible to assess from the current context how POs are likely to emerge henceforth. Drawing upon the international literature and focusing on newspaper coverage of the 2019 Irish beef crisis, the paper presents insights to the relational challenges to future horizontal integration of producers into POs and vertical co-operation between POs and processors into APOs and IBOs.

Our analysis of the factors influencing horizontal integration shows that although a few recognised POs were established and present the sector with potential to improve the situation of producers, they are also likely to face some challenges internally in the beef sector. Two themes emerging strongly from media representations were challenges of weak leadership capacity and member heterogeneity in the sector.

Weak leadership capacity was translated as fragmented representation and continuous schisms among the various organisations claiming to represent the interests of the beef farmers. Considering that pre-existing organisational structures contextualise and shape the emergence of new institutions/POs [4], fragmentation could and did lead to an impasse with regard to co-operation between new POs affiliated with different representative factions, possibly impeding the future establishment of APOs. Weak leadership capacity was also evident in the difficulties farming organisations experienced in negotiations when they could not guarantee that their members would accept the deal negotiated by their leaders.

The media coverage also evidenced a degree of member heterogeneity whereby protesting producers, committed to pursuing a common goal of an increase in returns, could not find a consensus regarding their demands in the absence of the possibility to discuss price (ultimately prevented by CCPC). Furthermore, drawing a significant distinction between full-time producers whose incomes are reliant solely on farming and part-time producers who supplement off-farm income with beef farming, the coverage of the crisis exposed internal tensions among beef producers, which became prominent towards the end of the protests.

Although media reportage of tensions among beef producers would suggest difficulties in the internal operation of emerging POs, it is important to bear in mind that reportage occurred under extraordinary circumstances of the largest crisis in the beef sector in decades. It is therefore important not to over-emphasise the conflict occurring among producers. While much less significant than the focus on conflict, the newspaper coverage also highlighted a degree of solidarity among producers that was evidenced in support for and cohesion among local protesters. This suggests, in line with previous research, that geographically close and cohesive groups might be able to commit to local POs and may provide a foundation for the establishment of APOs in the future. The outlook for POs also improves when it comes to quality requirements whereby, as recognised by Hooks et al. [4], there is an overwhelming agreement that Irish beef producers are already performing at a very high standard and their produce possesses attributes that are highly prized by consumers, suggesting that compliance with the quality requirements will not be a significant barrier in the Irish context.

When it comes to challenges to vertical co-operation and co-innovation between POs and processors and integration into IBOs or VBSCs, the image darkens. Media reportage shows significant dependence of producers on the processing sector, rooted in the fact that the Irish beef chain currently operates in a situation of oligopsony, whereby a small number of agents control the vast majority of meat processing capacity and exports in the country, leaving producers with very few options to offload their stock.

The difference in dependency types and levels in the chain leads to a severe asymmetry of power that favours the processors and affords them significant control over the price paid to producers, either directly or via imposition of rules and regulations. This capacity to control price has been reported to leverage and appropriate value from producers beyond justifiable levels considering international market developments. Thus, producers are pushed to a point where they are forced to leave or downscale businesses due to low return, often maintaining farms as part-time or largely hobby activities.

The resultant asymmetry of power supports high profitability for the processors according to the international literature. Following the logic of strategic management of supply chains, which sees the appropriation of value as the ultimate goal of business [56], relinquishing such power and increasing the position of producers by vertical integration into IBOs or VBSCs makes little sense from the perspective of the processors. This finding is consistent with existing research on supply chains in the Irish beef sector which found a lack of commitment from processors to be among the main barriers to vertical integration into IPOs and VBSCs [4].

Moreover, the negative effect of asymmetry in power and dependency on the possible emergence of vertically integrated co-innovative partnerships at the producer–processor level is further amplified by the lack of trust between the processors and producers. Furthermore, relationships of antagonism escalated into open hostilities and conflict in the context of the recent crisis.

Conspicuous by its absence, at least in the context of the media reportage presented above, is the issue of the awareness of the benefits of vertical cooperation either of producers or of processors. While there were three references to the establishment of POs as a possible way to increase the bargaining position of the producers, the issue of vertical co-operation or integration into IBOs or VBSCs was not mentioned at all, suggesting, in line with Hooks et al. [4], that awareness of the vertical model is still very low among

Irish beef chain actors. This, echoing [4], signals an unambiguous policy implication from the analysis of this paper—communication of the transformative potential of not only POs alone, but the necessity of horizontal and vertical cooperation to realise this potential. Recognition of POs by enterprise development institutions, extension and innovation brokering services and policy makers of the potential for just co-innovation for the mutual benefits of farmers, processors and a wide variety of other chain actors must be mainstreamed in a targeted campaign. The functions of POs, which go beyond collective marketing and are specified in EU policy to include activities such as joint management of farm waste, signal future opportunities in burgeoning opportunities such as green market segments and the bioeconomy.

Taken together, the analysis presented in this paper of the challenges to vertical co-operation or co-innovation suggests that the emergence of such partnerships between producers and processors in the Irish beef chain is not imminent in the near future. To achieve the potential of beef POs in the Irish beef sector at least partially, strategic policy-supported interventions are required for actors throughout the beef chain to engage with and operationalise the functions of POs for their mutual benefits.

Considering the exploratory and circumstantial nature of this study, the analysis presented opens several avenues for further inquiry. For the purposes of brevity, we will limit ourselves to two instances with an immediate application in further research. At a conceptual level, the discussion of the relational barriers to effective operation of POs and cooperatives which flows from the previous research, most notably Bijman [31], can be used by others to investigate barriers to successful horizontal and vertical cooperation across various local contexts. Such an endeavour even has the potential to be developed into a standalone conceptual framework, or checklist, for assessment of local environments for conduciveness (or hostility) towards horizontal and vertical integration. At a practical level, the study, alongside previous work on the topic conducted by Hooks et al. [4], paves the way for a more in-depth empirical case study examination of the factors that influence effective operation of the emergent POs in the Irish beef sector based upon primary data, such as interviews with farmers, PO representatives, representatives from the processing and retail industry, experts and policymakers. Such a study would have a strong potential to identify possible ways to strengthen the horizontal links among producers and encourage vertical integration of producers with other actors in the production chain.

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