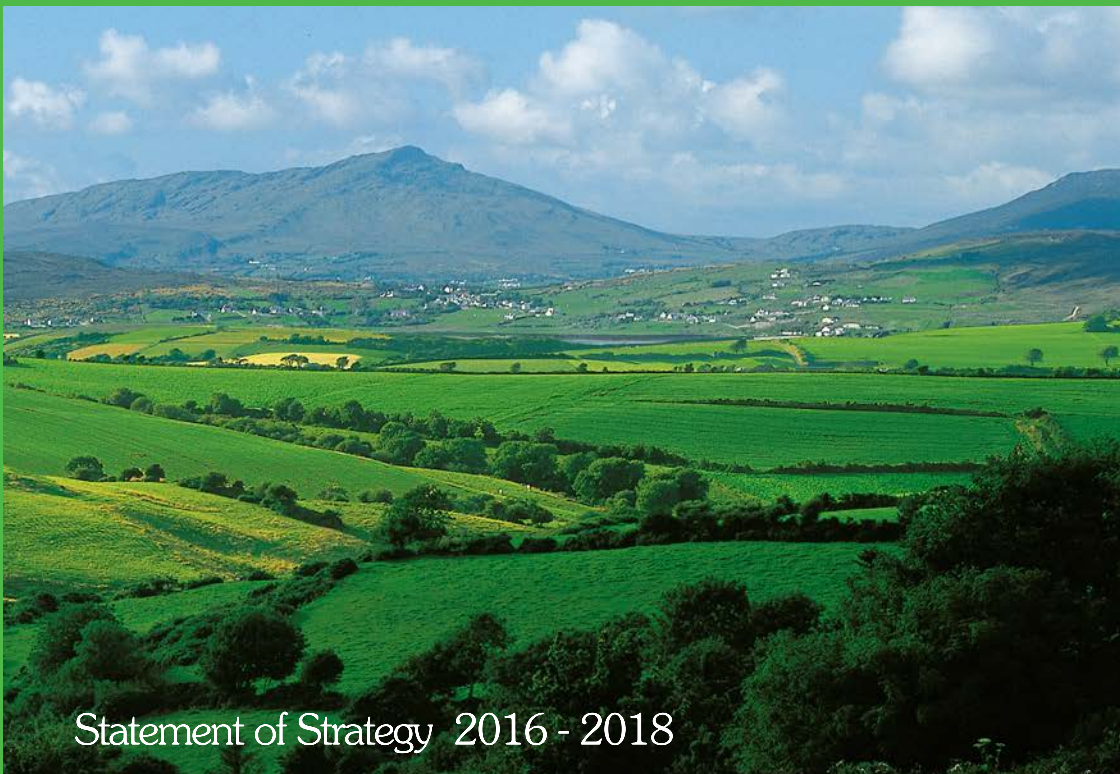
Making a World of Difference



Statement of Strategy 2016 - 2018

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

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Irish Food Board

Mission Statement

"To drive, through market insight, and, in partnership with industry, the commercial success of a world-class food, drink and horticulture industry."

Bord Bia
Irish Food Board

Strategic Objectives

1. **To actively contribute to the success and development of the Irish food, drink and horticulture industry.**

2. **To enhance the reputation, based on the principles of sustainable development, of Irish food, drink and horticulture, among consumer and trade buyers in the marketplace.**

3. **To be the authoritative source of strategic insight linking market opportunities to industry.**

4. **To lead a collaborative approach with the key agencies involved in serving Irish food, drink and horticulture.**

5. **To pursue emerging opportunities and actively respond to significant market issues that affect industry.**

6. **To deliver value-for-money with expenditure.**

1. Preface

The performance of the food, drink and horticulture sector continues to excel.

Irish food and drink exports have now experienced six years of consecutive, sustained growth, to reach €10.8 billion by 2016, which is 52% higher and €3.7 billion more than where they stood in 2009.

And future prospects remain bright. The underlying factors of population, middle-class growth and urbanisation will continue to underpin the expansion in global demand well into the future. At the same time, the lifting of dairy quotas and the continued broadening of access for our beef industry remove some of the key constraints limiting our industry's capacity to exploit the opportunities generated by export markets.

In the meantime, the marketing environment has continued to evolve. The Common Agricultural Policy and the Common Fisheries Policy have been reformed, and a free trade agreement between Europe and North America is currently under discussion. Longer life expectancy and an ever increasing focus on health and wellbeing continue to rise on the global agenda, accompanied by growing concerns about obesity and lifestyle-related diseases.

Discount retailing and retailer brands continue to make gains in market share while the rise in mobile technology offers a new system of engagement and interactions around the world.

The perception of Ireland in a marketplace that is placing a growing emphasis on how and where our food is produced remains strongly positive. Our grass-based production systems, our island status and our ocean wealth are key strengths that highlight our green credentials, all now underpinned by the unique commitment to which our farmers and our fishermen, and our food and our beverage processors are making under the Origin Green umbrella.

Significant challenges remain, however, in our environment.

The FAO food price index, while remaining well above the level of the previous decade has come off its 2011 peak and has been falling now for four years, while volatility, where weather plays a major role, requires constant monitoring.

The UK remains our largest market by a distance and its population growth is forecast to be the highest in Europe. Yet, its proposed referendum on EU membership raises new uncertainties. And while recent movements in currencies are to Ireland's advantage, we remain vulnerable to currency fluctuation when some 70% of our exports are to markets outside of the Eurozone.

Indeed, Ireland's relative international competitiveness as measured by the Competitiveness Scorecard published by the National Competitiveness Council in 2015 warns that while we have made progress, our ability to compete has been boosted by benign external factors that could quickly be reversed.

The industry's expertise in developing international markets, evidenced by the significant expansion to markets outside of Europe over recent years, is a major strength.

This statement looks at the trends that will affect the development of the global food and drink market over the next ten years — and at what they mean for the Irish food and drink industry.

It builds on Food Wise 2025, the report of the Agri-Food Strategy Committee, coordinated by the Department of Agriculture, Food and the Marine (DAFM), which sets out the strategic plan for the development of the agri-food sector over the next decade.

Based on original qualitative research and discussions with companies, producers, academics and industry experts, it sets out a bold but realistic vision of the industry in 2025. In particular, it sets out our Statement of Strategy, our commitment to and plan for working with the food, drink and horticultural sectors to achieve this vision.

More specifically, we:

- Explore the broad contours that will shape the global consumer marketplace.
- Uncover the opportunities and challenges that these contours represent for the Irish food and drink industry.
- Identify key changes in consumer behaviour.
- Outline the actions that need to be taken, for the industry and for each sector.

The statement is designed to help organisation and its stakeholders respond to change more effectively and thereby safeguard the future of the Irish food and drink industry.

Michael Carey, Chairman

Aidan Cotter, Chief Executive

Why a vision?

An important part of Bord Bia's role is to support its members by helping them make better, more informed, strategic decisions. Working together towards a unified, shared vision is a key part of this.

In an uncertain, complex world, it is all too easy to be blown off course by events as they occur. A vision acts as a 'guiding star', allowing an organisation to remain focused and to adapt and respond to changes and 'external shocks' more effectively.

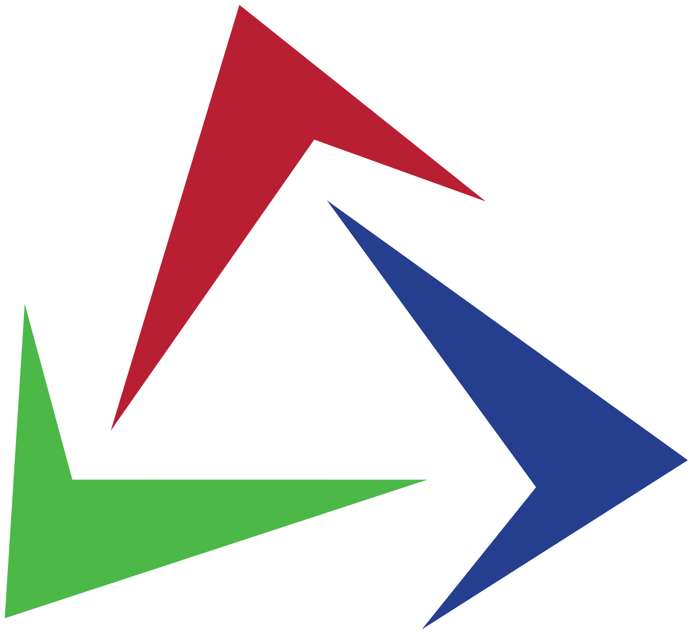
2. The forces shaping the future

The vision has been developed in the context of changes in the operating environment.

These changes can be subdivided into three categories:

Macro dynamics –

These are the social, technological, environmental, economic and political forces that shape the business environment. They represent long-term, macro, global forces of change, with the potential to reshape many aspects of our lives. Given the magnitude of these shifts, we expect they will be relevant and influential over the next decade and beyond.



Consumer trends

These represent sustained shifts in attitudes, values and behaviours that drive changes in consumer / shopper choices and needs. These shifts in consumer behaviour are shorter term, and typically help to guide us over the next two to five years. Bord Bia's Consumer Lifestyle Trends Programme tracks consumer trends on an ongoing basis.

Food contours

These represent some of the major shifts in the global food system — so, the major trends that we see reshaping the way that we source, produce and consume food. These shifts are often driven by the macro dynamics mentioned above, and should be important in reshaping the food system over the next five to ten years.

Macro Dynamics – Long term, macro, global forces of change

1. Shifts in the balance of world economic power

The world economic order has changed. Economies in the South and East are now leaders in terms of GDP. China is ranked number 2 in the world, Brazil number 7 and Russia and India 9th and 10th respectively.[1]

The burgeoning middle class in Asia is creating new markets for consumer goods.

By 2030, there will be 2.7 billion new Asian middle-class consumers, accounting for 90% of global middle-class growth. In China around one billion people - as much as 70% of the country's projected population - could be middle class.[2]

Rapid economic growth in China, India, Indonesia, Vietnam, Thailand, and Malaysia will cause **Asia's share of the new middle class to more than double from its current 30% to 64% by 2030** and mean Asia will account for over 40% of global middle-class consumption.[3]

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2. Increasing empowerment of women

The future, it seems, is female. Though inequalities remain, women are making huge strides in education, employment and commerce.

- **Two-thirds of the world's 781 million illiterate adults are women.** Even though the size of the global illiterate population is shrinking, the female proportion has remained virtually steady to around 64%. However, youth illiteracy only has a 5% gender gap, with 87% of female youths with basic literacy skills, compared to 92% of male youths. However, **in tertiary education women are outpacing men with only 3 of the OECD countries with fewer women than men.**[5]

- Women's participation in the global labour force has held steady since 1990, while men's has fallen. However, women are more likely to be employed in the services sector and the informal economy, and are less likely to occupy senior positions. For example, just 25 Fortune 500 companies are run by women.[6]

Two-thirds of the world's 781 million illiterate adults are women.[4]

3. Global urbanisation

Density is destiny. Urban living will increasingly be the norm across the world, raising issues about quality of life and community dynamics.

- **By mid-century, two-thirds of the world's population will live in cities, compared with just over half today.** Megacities — cities with more than 10 million inhabitants — are a major force for the future. The UN predicts 41 megacities by 2030, accounting for 14% of the world's urban population.[7] Most new ones will be in newly industrialised countries and the developing world. The list already includes Mumbai, Mexico City, Beijing, São Paulo, Manila, Karachi and Lagos. The developing world is becoming predominantly urban, with urbanisation in developing countries proceeding faster than in developed countries. However, the correlation of the rate of urbanisation with economic growth has been weaker. **A third of the urban population in emerging markets live in slums, and the proportion is predicted to increase by 6 million people annually through to 2020.**
- The UN predicts that by 2030, 3 billion people, or about 40% of the world's population, will need proper housing and access to basic infrastructure and services such as water and sanitation systems.[8] This translates to the need to complete 96,150 housing units per day with serviced and documented land from now till 2030.[9]

By mid-century, two-thirds of the world's population will live in cities, compared with just over half today.

4. Changing attitudes to ageing

Old age will be reinvented. Longer life expectancy will radically alter societal perceptions and priorities related to work, leisure and health.

- Global life expectancy for men and women has increased by about six years over the past two decades. **Furthermore, the 85-and-over population is projected to increase 351% between 2010 and 2050,** compared to a 188% increase for the population aged 65 or older and a 22% increase for the population under age 65 [10]

- In North America and Europe, many people are working (either through choice or economic necessity) past traditional retirement age, often part-time. Others see retirement as a chance to change direction and do something more fulfilling.[11]

- Exercise, a healthy diet and keeping up with new technologies are all priorities for older consumers to stay young. For example, American senior citizens (65+) are the biggest group of adopters on social networks.[12]

The 85-and-over population is projected to increase 351 percent between 2010 and 2050.

5. Changing household structures and family roles

The concept of the 'household' will be more diverse and unconventional, and this will also be reflected in more fluid family roles and responsibilities.

- Over the past half century, households have changed dramatically. Fewer adults marry; more get divorced. Single parenthood is more common, as are blended families, where children have only one parent in common.

- Globally, the number of households is increasing as more people live on their own or in smaller family units. **Single-occupant households now account for 15% of the total worldwide and 31% in Western Europe.**[13] The number of households in the world's major cities is expected to grow 2.3 times faster than the cities themselves.[14]

Single-occupant households now account for 15% of the total worldwide and 31% in Western Europe.

6. Increasing economic inequality

The disparity between rich and poor — both within and across regions — is growing.

- Despite strong economic growth and the creation of millions of new jobs since the early 1990s, income inequality has widened in many regions of the world .[15] **According to Oxfam, the combined wealth of the richest 1% will overtake that of the other 99% of people by 2016 if the current trend continues.**[16]
- Income inequality in India has doubled in the past 20 years. China, Russia, and South Africa have also become significantly less equal during that time period.
- Globally, more than half of consumers say they're angry that wealth is concentrated in the hands of the few. In the hardest-hit European markets (Italy and Spain), the proportion tops 70%.[17]

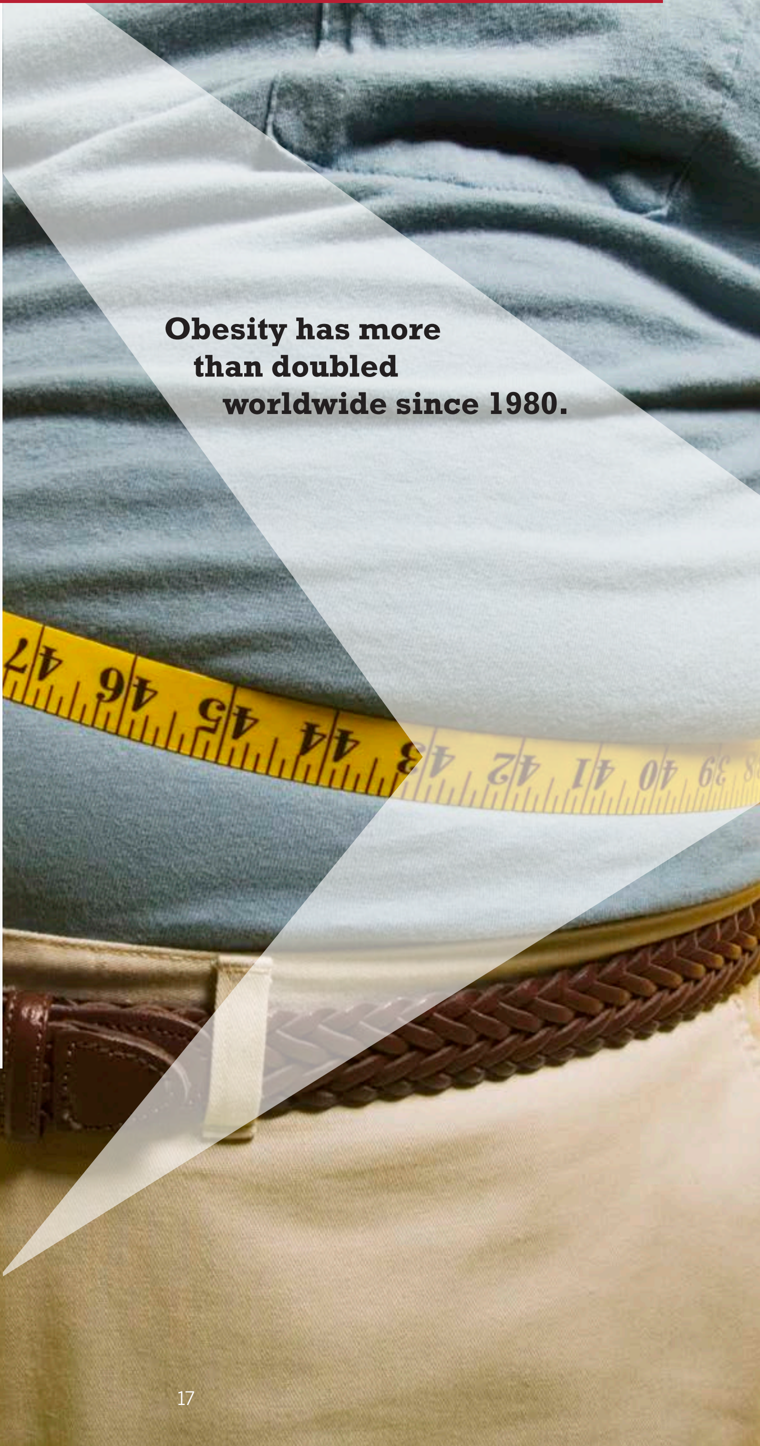
Globally, more than half of consumers say they're angry that wealth is concentrated in the hands of the few.

7. Global rise in lifestyle diseases

Across the world, rising prosperity and modern conveniences are leading to a higher incidence of life-threatening health conditions such as obesity, diabetes and heart disease.[18]

"Diabesity" is a new term for the twin epidemics of obesity and diabetes. Obesity has more than doubled worldwide since 1980. Currently, about 347 million people worldwide have diabetes, and the disease is predicted to become the seventh biggest cause of death globally by 2030, with total deaths projected to rise by more than 50% in the next 10 years and much of the growth coming from emerging markets.[19]

- Changes in nutrition, labour and leisure are leading to an increased incidence of lifestyle-related conditions. Evidence is mounting that the high levels of fat, sugar and salt typically found in the diets common in more prosperous countries are linked to cancer.[20]



Obesity has more than doubled worldwide since 1980.

8. Rise in the use of mobile technology

Mobile technologies are rapidly becoming the preferred means of Internet access, especially for leapfrogging emerging markets.[21]

- Internet-enabled mobile devices, including smartphones, tablets, PDAs and netbooks, are set to become the dominant computing medium of the next decade.[22]
- Smartphone subscriptions will more than double by 2020, reaching 6.1 billion. Almost 80% of these new subscriptions will come from Asia Pacific, the Middle East and Africa.
- In many developing markets, ownership of mobile phones now outstrips access to basics such as electricity and sanitation. The Middle East and Africa will have the strongest mobile data traffic growth of any region between 2014 and 2019.

Smartphone subscriptions will more than double by 2020, reaching 6.1 billion.

9. Growing climate change impacts

Scientists are increasingly linking climate change to extreme weather events and longer-term temperature and sea-level shifts.

Extreme weather events (such as hurricanes and tornadoes) are increasing in frequency and intensity. The consequences associated with these events are also on the rise in terms of destroyed property, declining crop yields, shifting water resources, rising sea levels and a variety of health challenges.

- Recent work by NASA's National Climate Assessment centre suggests that rainfall levels, droughts, high-intensity hurricanes and severe flooding are all increasing and projected to continue as the world's climate warms.
- The moderate global warming that has already occurred as a result of human emissions has quadrupled the frequency of certain heat extremes since the Industrial Revolution. A failure to bring greenhouse gases under control could eventually lead to a 62-fold increase in such heat blasts.

Extreme weather events (such as hurricanes and tornadoes) are increasing in frequency and intensity.

Future Contours — changes in the way we source, produce and consume food

1. New buying habits

Wages and overall standards of living continue to stagnate in many markets, even as the global economy recovers some of its previous momentum. Many consumers are making more considered and researched purchases. As the economy improves, many habits developed during the recession will remain and become new norms. The continued growth and success of discounters is an indication of this. We are seeing shoppers buying from discounters but also trading up in local shops or more premium supermarkets. There is a greater polarity in buying habits.

2. Building trust chains

Consumers continue to demand greater transparency and traceability throughout the food production process.

High-profile food scares and scandals worldwide have eroded public trust and made people suspicious of complex supply chains in the food and drink sector. Third-party organisations such as NGOs are becoming increasingly important to consumers as they seek ways to validate their food and drink choices. In addition, people are turning more to family members, peer networks and familiar local suppliers for advice about what they eat and drink.

3. Increased health concerns

Both organisations and individuals are increasingly focused on good health and wellbeing as people struggle with lifestyle diseases, intolerances and poor nutrition.

At the same time, attitudes to health are more holistic, with many people looking for natural, organic and preventative solutions. In parallel, technology is giving consumers new ways to pursue their health and wellbeing goals, and helping to increase consumer understanding of the functional benefits of ingredients. People are increasingly looking for foods that satisfy their personal health needs — for example, iron-rich, vitamin-enriched foods, and sugar substitutes.

4. Reinventing mealtimes

'Time poverty' means that consumers' involvement in preparing their own food is set to decline.

We will see significant shifts and innovations in food and drink products and offerings, routes-to-market and business models. Despite the increased time pressure that consumers face, they still want to retain a connection to food preparation and to retain some ownership of the process.

There is, therefore, a demand for more high-quality, sophisticated, time-saving solutions that offer both health benefits and the chance to be creative in the kitchen. An example is the meal assembly 'kit' that comes complete with fresh ingredients.

5. New retail routes

Consumers are increasingly open to new ways of buying food – moving from the traditional weekly supermarket shop to more frequent trips to local stores, and to online retail.

These changes are driven by the search for convenience, bargain-hunting and the need for specific ingredients/ products that are not available in all stores, as well as more emotional desires. Digital technology has had a significant impact on the provision of new retail routes. Companies are increasingly harnessing the opportunity that online and mobile provide to streamline the purchase, delivery and creation of food products.

6. New forms of production

To meet the needs of the growing global population and the challenges presented by climate change, the agricultural system will need to evolve.

As growing conditions shift, new technologies in plant engineering and farming grounded in regional knowledge will cultivate new resilience. Technological advances and greater international collaboration are enabling a wider variety of forms of food production.

7. Resource-constrained diets

With rising scarcity of resources such as water, energy and arable land the range of foods we eat, and where we source our food from, will have to evolve.

This will entail identifying new sources of nutrition, intelligent modification of local ingredients, and the use of new technologies, as well as rethinking our approach to food waste.

3. A Vision for the Irish Food and Drink Industry

This statement puts forward a vision for the Irish food and drink industry in 2025 and proposes ways to achieve it. Both the vision and the action plan have been developed after an extensive and wide-ranging stakeholder-engagement process.

Qualitative research included:

- **Interactive stakeholder workshops with participants from food and drink sectors, industry associations and other relevant partner organisations, and academic institutions**
- **A series of interviews with stakeholders from inside and outside the industry**
- **Written submissions from individual organisations**

The clear ambition behind the vision is for Irish food and drink to be recognised as world-class by consumers in Ireland and more widely. A key part of this is making sure that the qualities that help to make Irish food and drink unique are more front-of mind-than they are now – for example the sustainable basis for food production and the high-quality, natural resources such as Ireland's water and grass, that are core to so much of its produce and ingredients. There is a clear opportunity for the industry to continue to build upon these strengths – and on the passion, skill and dedication of our producers.

At the same time, we recognise that the food and drink industry faces huge challenges over the next decade. While the more extreme effects of climate change are unlikely to be seen in day-to-day weather for another two generations, there is increasing evidence that extreme weather events across the globe are already being intensified by climate change. The consequences for food production are profound, and the challenge for the industry is to transition to a model of production that fulfills our needs – within planetary limits.

Passion and innovation are central to this mission, with the aim of demonstrating on a global stage the qualities that make food and drink from Ireland unique and sustainable.

“Ireland: 2025

Customers around the globe recognise that Irish food and drink is world-class: that it is high-quality, distinctive, and made by a diverse range of creative producers from a unique and fortuitous island location.

And our producers set the global standard in sustainable production – meeting the responsibility we all have to the planet, to society, and to future generations.

We have everything we need for a better, more sustainable food system. There has never been a better time to act, and to set an example for the world.”

We believe this Vision is achievable by 2025. Ireland's advantages — its sustainable basis for food production, its climate, its natural resources, its water and grass — make it a natural leader for food and drink. This, though, is a different thing from saying the development of the food and drink industry can happen 'naturally'.

The Vision depends on five strategic pillars, each of which supports the growth of the industry. It will be:

1. Informed by consumer insight

2. Enabled by valued people, talent and infrastructure

3. Underpinned by Origin Green

4. Realised by effective routes to market and business conversion

5. Supported by strong brand communications in the digital age

The passion of producers and their commitment to demonstrating on a global stage the qualities that make Irish food and drink unique will, of course, also be decisive.

The pillars described above have practical implications for members of the food and drink industry — in both the short and long term. At the beginning of March 2015, in-depth workshop sessions were held with stakeholders to isolate and identify these implications.

The workshops were later supplemented with further stakeholder and external interviews and discussions with Bord Bia — and by a review of recent research on the food and drink industry.

The result is an 'action plan' consisting of both industry-wide and sector-specific actions. The actions are not meant to be comprehensive — or sufficient. However they can be seen as fundamental and essential steps on the path towards a more certain future.

1 A Vision informed by consumer insight

The consumer is at the heart of the Vision — and strategies for business growth need to be consumer-led.

The world will continue to evolve in significant ways over the next ten years. Consumer and market insight will remain central as steps along this journey are evaluated and progress towards the vision is achieved. **Cementing the role of the consumer in the Vision for 2025 and ensuring that changes in consumer behaviour and market landscape are anticipated and acknowledged are critical.**

Building on Bord Bia's expertise in this area and the work currently undertaken to drive business growth through unlocking consumer understanding, the establishment of a Bord Bia Centre for Consumer Insight – a centre of excellence - is key. The Centre for Consumer Insight will have as its focus the enhancement of insight alongside consumer-focused innovation. The Centre for Consumer Insight will seek to immerse producers, scientists, academia and retailers in the world of consumers. It is the critical next step to further supporting large and smaller producers and ingredients manufacturers in the challenges they face, in creating and building brands and bringing new products to market to expand their growth and success in overseas markets.

The Centre for Consumer Insight will be both a built and globally connected virtual environment - an inspirational and creative place where consumers, producers, researchers and all involved in the industry connect. It will strive to ensure the the branding and innovation chains will start with the consumer and end with the consumer. Its virtual capability and leading edge technology will allow for global accessibility - to build sales on the domestic market and, most critically, build exports.

Actions:

- Build on our existing expertise in consumer and market insight and establish a Centre for Consumer Insight.
- Invest in a physical space that is creative and inspirational, and critically, is accessible to international visitors and consumers who will be involved in the consumer research. This space will be integrated with Bord Bia headquarters to minimise additional budgetary requirements.
- Invest in communications technology, partner with private enterprise, and, share intellectual expertise, global connections and innovation experiences to ensure the Centre is a state-of-the-art, outward looking and world-class facility.
- Enhance investment in knowledge sources and content management.
- Increase the number of marketing specialists in areas of qualitative research, data mining and analysis, and branding and innovation.
- Communicate benefits to all stakeholders to maximise engagement.

2 Enabled by valued people, talent and infrastructure

If the industry is to continue to grow, it needs to recruit the right people — and to retain them by making them feel they are valued and that their contribution is being recognised.

Maintaining and building on existing programmes such as the Bord Bia Fellowship and Origin Green Ambassador Programmes will be essential.

Continued investment in infrastructure is needed to provide the right environment for a thriving industry.

Actions:

- Implement the undergraduate Language Bursary Programme to improve the language proficiency of graduates coming from strategically important degree programmes to the food and drink industry such as agricultural science and food marketing and entrepreneurship.
- Continue to fund The Marketing Fellowship and Food Marketing Graduate programmes to deliver high-quality talent to the food industry.
- Build on the Origin Green Ambassador programme to engage with targeted customers to build awareness and understanding of Ireland and the Origin Green programme.
- Establish a Market Placement programme that assigns Irish graduates to global target customers. The programme will create a group of graduates skilled in best practice that they will bring back to the Irish industry upon their return. The placement will also serve to raise awareness and understanding amongst host companies of Ireland and its industry capabilities.

3 Underpinned by Origin Green

Origin Green is rapidly positioning Ireland as a world leader in sustainably produced food and drink. As the world seeks to expand food production to meet the needs of its growing population, while addressing climate change and working with fixed or shrinking resources, it is the only way forward.

Tapping into our existing reputation as a grass-based green and dynamic food and drink supplier, the Origin Green programme shows what Ireland's food and drink stands for and what is now increasingly setting it apart.

Origin Green is a voluntary programme, which embraces farmers and manufacturers and addresses key sustainability areas such as sourcing, emissions, energy, waste, water, biodiversity and CSR activities. Once approved, verified members are entitled to use an 'Origin Green' logo as part of their trade marketing and communications. Already, over 85% of Ireland's exports are coming from verified member companies, proving the industry's commitment to sustainability.

The current focus is on Origin Green as a B2B concept. However, the intention is to make Origin Green the platform upon which the broader recognition and promotion of world-leading Irish food and drink will be built. It is our conviction that the principles and values of Origin Green will, over time, become more and more relevant in consumer choice and establishing our credentials has the potential to position Ireland as a true sustainable food leader of the 21st century.

Transparency and safe supply chains are a critical component of the Origin Green ambition. Consumer trust in where their food comes from and how it is made is vital for manufacturers, retailers and, indeed, the reputation of Ireland's food and drink industry. Producers recognise the priority that should be given to transparency throughout the supply chain – to form a chain of trust– starting at the source of the raw ingredient or farm of origin. Without safe and transparent supply chains, the vision for the Irish food and drink industry cannot be achieved. Indeed, there is clear strategic advantage in a well-developed trust chain that has credibility in the eyes of consumers.

Actions:

- Maintain Origin Green's leadership in sustainability by broadening the programme's scope and depth in areas such as soil health, nutrient management, bio diversity, animal welfare and sustainable feed.
- Improve feedback and advice to farmers by developing a network across all relevant state agencies and advisory bodies to deliver clear, coordinated advice on how farmers can adopt sustainable practices that deliver both environmental and economic benefits.
- Support national programmes that assist in securing farmer engagement with sustainable practices. This should build on initiatives such as the beef data genomics and knowledge transfer programmes.
- Develop a messaging programme to communicate the benefits of Origin Green membership to farmer stakeholders to ensure greater adoption and engagement with the programme.
- Increase direct engagement and support offered to companies developing their sustainability plans. Recruit additional Origin Green resources to ensure the required level of engagement is delivered.
- Develop a mentoring programme to work with verified members to help them articulate their sustainability efforts to key customers and stakeholders and gain recognition in the marketplace.

3 Underpinned by Origin Green

- Build on the Origin Green Ambassador programme to develop ongoing relationships with targeted customers enhancing awareness and understanding of Origin Green and driving a preference for Ireland as a sustainable source of supply.
- Continue to build on the social sustainability elements of Origin Green with particular focus on health and wellness.
- Expand the scope of programmes along the domestic supply chain to include retail and foodservice sectors by developing charters relevant to each.
- Use consumer insight to identify and understand how consumer differences across geographical markets will impact on Origin Green messaging around sustainability.

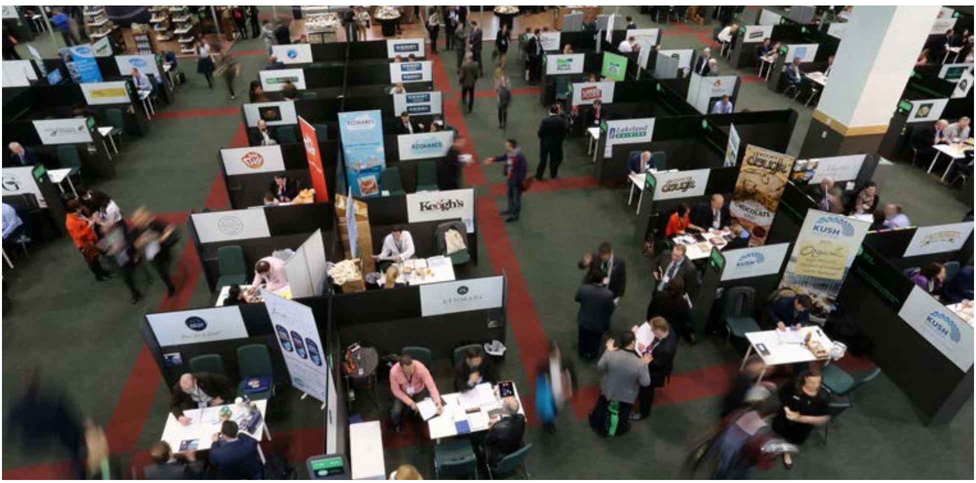
4 Realised by effective routes to market and business conversion

A critical pillar of the vision is the development of efficient and effective routes to market to achieve business growth, which requires stronger support from state agencies and industry itself.

Business development is an important priority for Bord Bia, in terms of export strategy, market and customer prioritisation, route to market competencies and in-market supports. Achieving the 2025 vision requires a targeted customer support programme that is delivered by skilled, dedicated resources, both in Ireland and overseas.

Actions:

- Invest to step-change business development through increased in-market resources.
- Increase market presence in emerging markets, by recruiting additional overseas staff with particular focus on Asia and Africa.
- Assign specialist global account responsibilities at Bord Bia to build Ireland's awareness and reputation among key global customers.
- Further enhance B2B communications around Ireland as an innovative, competitive sourcing solution via a dedicated website of Irish industry and capabilities.
- Invest to build competencies in business development at Bord Bia and amongst the supplier base via understanding of routes to market, business protocols and supplier development programmes etc.
- Invest in innovative buyer contact initiatives and inward buyer visits across all existing markets and introduce them into emerging markets.
- Implement lead generation programmes across all geographies to deliver market and business prospects.
- Maintain support for Marketplace 2018 and broaden the focus on emerging markets so that 50% of buyers come from outside the EU.
- Liaise closely with the DAFM to optimise trade missions to emerging markets to ensure market entry conversion.



5 Supported by strong brand communications in the digital age

Further investment is needed to communicate the quality and benefits of Irish food and drink brands, both domestically and more widely. There are three distinct elements to this:

- First, the promotion of Irish food and drinks brands at an overall, umbrella level – building on the Origin Green platform to continually develop it as a B2B brand and, over time, a consumer facing endorsement. (The Quality Assurance Mark will embrace the values of Origin Green as part of this process.)
- Second, is the importance of individual Irish brands both large and small, and the need for greater support and promotion of these individual brands.
- Third, is the recognition that Ireland is a world leader in the manufacture and production of ingredients and own label goods. It is, in effect, the 'intel inside' equivalent for many highly successful branded goods.

Examining first the importance of Irish food and drink in an overarching sense, it is core to the vision that 'Brand Ireland' is synonymous not just with friendly people, popular music and beautiful scenery but also with great food and drink. Food needs to become a core part of the Irish identity, as it is in countries such as France and Italy. Other useful comparisons are the notion of 'Danish design' and 'German engineering' – both of which encapsulate a core truth about a country and an industry and allow a multitude of brands to benefit from the halo effect of this brand awareness. This is part of our vision for Irish food and drink.

Origin Green has been highly successful since its launch as a B2B brand highlighting Ireland's commitment to sustainability in its broadest sense. As indicated above, a key Bord Bia priority going forward is significant growth and evolution of Origin Green – taking it from a successful business-to-business brand to a broader focus where it resonates also with consumers and becomes synonymous with Ireland's reputation for world leading food and drink.

At the individual brand level, Bord Bia needs to continue its efforts working with producers to create and build strong brands based on consumer understanding. The level of investment required to grow brands into more globally recognised brands is very significant; Origin Green will be a vital brand and marketing pillar to help in this journey.

Actions:

- Undertake a global brand review of Origin Green to ensure its relevance to a corporate and consumer audience, and evolve accordingly. Invest in design, photography, videography, research and tracking.
- Further increase consumer demand for food with the Quality Mark (as it embraces the values of Origin Green) in the domestic market by highlighting its unique rational benefits of independent auditing and quality and sustainability standards and strengthening its emotional connection with consumers, thereby driving brand leadership and differentiation.
- Accelerate collaboration with the tourism sector for mutual brand building advantage.
- Ensure consistency of message for food through collaborative communication channels.

- Explore the potential of global Irish food and beverage brands distributing the message for food and tourism in international markets.

- Through the Centre for Consumer Insight continue to support brand owners to develop and grow their brands on the domestic market and international markets.

- Help brand owners create and articulate their brand story through consumer touch points of design, packaging and web presence.

- Ensure a dedicated resource for smaller brand owners by providing access to best-practice consumer marketing.

- For medium and large sized brand owners, continue to support brand development and growth into new markets by providing knowledge and understanding of global trends and consumer behaviour to maximise the chances of success.

- As digital marketing becomes an increasingly important route to communicate and influence consumers, dedicate a resource to help brand owners understand and use this medium.

- Dedicate a resource for the Bord Bia Branding and Insight and Innovation Workbooks - to work with and guide food and drink producers and help them embed the rigorous brand development process.

- Continue and expand the Brand Forum programme to bring international branding best-practice exponents to Irish companies via speakers at events, brand health measurements, and dedicated branding workshops.

4. Achieving the Vision

The actions outlined above will not be enough to realise the vision set out in this statement. Action also needs to be taken at sector level – to address challenges and develop opportunities specific to particular parts of the industry.

Here, we provide a snapshot of key food and drink sectors and outline the main priorities for each.

The meat sector

The meat and livestock sector is ideally placed to build on the considerable progress made in diversifying its market base over recent years. By 2025 the sector will have established a clear market preference on the basis of our high quality, sustainable product offering. This position will help the sector secure premium positions with key customers across Europe and selected international markets.

Meat and livestock exports account for more than one third of total Irish food and drink exports, and increased by 2% in 2015, to just over €3.7bn.

Pigmeat producers have benefitted from increases in demand from Asia, but have been hit hard by the Russian ban on EU imports, and profitability is a major challenge for the sector.

Growth in global beef production is likely to come mainly from Brazil and India. However, the opening up of the US market, as domestic supplies dwindle, could present a significant opportunity for Irish beef producers.[23]

The Irish sheep industry continues to broaden and diversify its product portfolio by shifting away from trading in carcases towards developing more value added / primal products. Emerging opportunities in the high value markets across Continental Europe has enabled the Irish industry to optimise its product and market mix and seek out the best paying customers.

Actions:

- Increasing emphasis on the sustainability of grass-fed animals and the high animal welfare standards among Irish beef, lamb and pig farms — in communications with food-service buyers and retailers and with consumers.
- Promoting Irish beef as safe, with transparent and traceable supply chains – particularly in emerging markets where trust is a challenge.
- Developing a strategy to build a premium position for beef in the US and key EU markets.

Beef

The customer profile of Irish beef presents a considerable opportunity to drive the reputation of Ireland as a sustainable beef producer. This requires the clear articulation of how the industry is, through Origin Green, working together to actively measure and drive our environmental performance in a way that is not matched anywhere across the globe.

- Increase the level of communication and engagement with and between processors and producers in terms of marketplace developments.
- Engage with retail customers to develop a partnership approach to the production of Irish beef, ensuring a harmonised and collaborative approach to market specifications, price points and farm management practices.
- Develop markets for fifth-quarter products through enhanced marketing capabilities and through enhanced market access.
- Investigate and develop viable alternative markets for the prime cattle arising from dairy herd expansion.
- Build on the launch of Irish beef in the US, implement a strategy for the premium positioning of Irish beef as sustainable and grass-fed, resulting in a growth of exports to high-end retail and food-service outlets.
- Where new market-access possibilities are identified, support the industry with the necessary resources for market and consumer insight.
- Develop further and build a brand image for Irish beef capable of securing a significant price premium at retail and food-service market outlets.
- Grow and protect the position of Irish beef in key European markets through sustained implementation of consumer and trade marketing campaigns for premium, grass-fed, sustainable and quality-assured Irish beef.
- Investigate opportunities for including animal welfare standards and the human health benefits of grass-fed beef in the marketing messages for Irish beef.
- Build on the opportunities for Irish beef in China, once market access is secured, driving value for fifth quarter products and offal.
- Increase farmer participation in the Beef and Lamb Quality Assurance Scheme (BLQAS) to 95% in terms of proportion of output by 2025.
- Develop a strong reputation for the quality and environmental sustainability of Irish beef with customers, competent authorities in target markets and NGOs, building on the Sustainable Beef and Lamb Assurance Scheme (Origin Green), and optimise use of the brand's reputation in the marketplace.
- Build sustainability criteria into the Beef and Lamb Quality Assurance Scheme (BLQAS) and launch a new Sustainable Beef and Lamb Assurance Scheme.
- Roll out of the Carbon Navigator tool through the beef data genomics programme.

Sheepmeat

The Irish sheepmeat sector has developed an increasing range of premium customers for high value lamb across the EU and selected international markets. Origin Green offers an opportunity to build on this through the clear demonstration of the sustainability credentials of Irish lamb production. Such a focus will help strengthen the market proposition of Irish lamb and act as a differentiator with key customers.

- Work collaboratively with processors, the DAFM, Teagasc and Sheep Ireland to modify the very seasonal nature of Ireland's sheepmeat supply, and maintain our presence and access to markets throughout the year.
- Increase the perception of lamb as a healthy, convenient protein choice among younger consumers in the domestic market.
- Build a strong brand image for Irish lamb based on its sustainable grass-based production to secure outlets and price premium.
- Develop a strong reputation for quality and environmental sustainability of Irish sheepmeat with customers, competent authorities in target markets and NGOs, building on the Beef and Lamb Quality Assurance Scheme (Origin Green), and optimise the use of the brand's reputation in the market place.
- Develop business opportunities in key international markets such as China and the US for Irish lamb.
- Implement generic promotion of Irish lamb across France, Belgium and Germany and compete for further EU funding post 2017.
- Target niche, non-traditional, high-end markets for value added, premium Irish lamb in Europe, such as Scandinavia and Germany.
- Build sustainability criteria into the Beef and Lamb Quality Assurance Scheme (BLQAS) and launch a new Sustainable Beef and Lamb Assurance Scheme.
- Increase farmer participation in the Beef and Lamb Quality Assurance Scheme (BLQAS) to 95% in terms of proportion of output by 2025.
- Explore opportunities in emerging markets for adding value to fifth quarter lamb through market and consumer insight.
- Develop a Carbon Navigator tool for sheep producers.

Pigmeat

The ongoing diversification of Irish pigmeat to International markets offers further scope to increase the value of exports over the medium term. Successfully achieving a market preference requires the development of a clear proposition built around the quality and sustainability credentials of the sector.

- On the domestic and export markets support primary and secondary pigmeat processors through consumer and trade insight to develop new products and routes to market.
- Work with industry to scope out an effective marketing message for pigmeat.
- Explore opportunities for greater use of quality-assured produce in food service.
- Invest and strengthen the position of the Quality Mark on the domestic market, positioning pigmeat as a versatile, healthy option among consumers.
- Develop and build market opportunities across European and third-country markets, in particular in newly opened markets in South East Asia.
- Use Origin Green to distinguish Irish produce, and develop a preference for it, in international markets.

- Incorporate sustainability criteria into the Pigmeat Quality Assurance Scheme.
- Develop a feedback and advice programme on carbon footprinting for pigmeat producers.

Poultry and Eggs

Poultry remains the most popular animal based protein based on its convenience, relative value for money and innovative product formats. While competing in an extremely competitive sector, it is well poised to grow share further up the meat basket globally.

- Support processors through consumer and market insight.
- Examine the extension of country of origin labelling to loose products.
- Invest in and strengthen the position of the Quality Mark on the domestic market.
- Incorporate sustainability criteria into the Poultry Quality Assurance Scheme.
- Roll out a carbon footprinting assessment and improvement programme for the poultry sector.

The Dairy Sector

The grass based nature of the Irish dairy sector offers a clear point of differentiation for Irish dairy products. Through Origin Green, the sector can clearly demonstrate its sustainability credentials and how the sector is making a collective effort to further enhance these over time. Origin Green offers an opportunity for the dairy sector to secure a market preference that can deliver the markets and customers needed to meet the ambitious targets outlined in Food Wise 2025.

Like meat and livestock, the dairy sector is core to the Irish food and drink industry — and to Irish exports. There are more than one million dairy cows in Ireland.

The abolition of EU quotas means Irish milk production is expected to increase to 7.5 billion litres, a rise of 50%, by 2020. The growth, however, will need to be carefully managed. Export sales have been affected by slower demand in China and by the Russian EU import ban, and there are fears of milk surpluses. The medium and longer term outlook for the industry remains positive, but potentially volatile.[24]

The best performing Irish dairy categories in 2015 were specialised nutritional dairy powders such as infant formula and butter while spreads, whey, chocolate crumb and yogurt all recorded growth.

Of these, the 'star' was infant formula, which has benefitted from industry investment. Irish dairy exports to Asia increased by an estimated 11% in 2015. Over three-quarters of this is destined for China which is now the second most important market for dairy exports compared to 13th in 2008.

Actions:

- Leverage the Sustainable Dairy Assurance Scheme (SDAS) and Origin Green to promote the sustainability credentials of the Irish dairy industry across Europe, China and the Middle East.
- Position Ireland as a leading supplier of sustainable dairy products with key customer accounts globally through Origin Green.
- Ensure the resources are in place to target / develop market opportunities for Irish dairy exports in the regions of the world where dairy per capita consumption and dairy deficits are growing.
- Create a deeper understanding for the Irish industry of key dairy growth regions in South East Asia, Africa and the Middle East through consumer- and trade-market insight.
- In areas such as healthy ageing, nutritional supplements and specialised nutrition, work with industry to develop products, ingredients or concepts that meet consumer need.
- Build on the technical and market competency of the farmhouse cheese sector through collaborative programmes such as the 'Cheese Institute'.
- Ensure 100% participation of dairy farmers in the SDAS as an immediate priority.
- Roll out of the Carbon Navigator tool through Rural Development Programme Knowledge Transfer Discussion Groups.

The Seafood Sector

The Irish seafood sector is well positioned to capitalise on the growing global marketplace for seafood. With a preference for seafood within many of the emerging markets, Irish seafood will continue to focus on growing key emerging markets and working to secure higher value business in core markets while building a vibrant home market for underutilised fish species.

The Irish seafood sector is worth €800m annually and employs around 11,000 people. Exports rose by 4% in 2015 — to around €560m— and are expected to reach €650m by 2020.

France, Spain, the UK, Italy and Germany remain the dominant export markets, accounting for more than 50% of values. However, trade to Asia and Africa has increased dramatically — by 23% and 14% respectively in 2015.

Ireland is a leader in organic aquaculture, producing 20,000 tonnes of organic salmon and mussels annually.

Climate change means Irish waters are now home to 'new' species. Boarfish, for example, have migrated north due to rising sea temperatures.[26]

Actions:

- Increase participation in and engagement with Origin Green among seafood companies, with the aim of bringing all seafood companies under the programme by the end of 2016.
- Develop strategies to reduce the level of produce sold in commodity form from 70% to below 50%.
- Invest in consumer insight and research in the key growth markets of Asia and Africa — e.g. China and Egypt.
- Support the industry in developing innovative consumer oriented products from both familiar species and those new to Irish waters.
- Based on the consumer insight/innovation process, identify and promote new opportunities and customers for added-value and food-ingredient products.
- Develop a series of programmes that prioritise sales, marketing, brand development, key account management and exporting skills in the sector.
- Undertake a market prioritisation study in Asia Pacific to identify the most attractive markets for the main seafood product groups and invest marketing resources accordingly.
- Seek to secure a premium positioning for Irish seafood in Europe and the US using sustainability and/or organic credentials.

Artisan/Small Food Business

The increased consumer demand for locally sourced food and shorter supply chains over the last number of years has created viable and alternative routes to market for players in these sectors. The combination of the entrepreneurial spirit of the owner managers with product innovation and differentiation and expansion via local, national and international markets will represent the pillars for the continued growth of these sectors at home and abroad.

The increasing importance of the sector is evident from the following:

- There are around 130 farmers' markets in Ireland, and around seven in ten Irish consumers say they consciously buy local food to support the economy.[27]
- Ireland produced 1,100 tonnes of farmhouse cheese in 2014 and has 30 artisan chocolate makers.

Actions:

- Work with retailers to promote local, Irish artisan products — for example, through in-store displays.
- Support continued participation in food shows, farmers' markets and awards schemes.
- Create a pipeline of companies growing beyond artisan/small-food-business definition via the introduction of both bespoke one-to-one and group multi-level supports across strategic planning, marketing and marketing finance (for example, Superbrands and Step Change Fund).
- Introduce a new support programme for direct-to-consumer producers aimed at enabling them to extend their local and regional business reach and resulting in a pipeline for new entrants to the Artisan Food Market at Bloom.
- Increase the opportunity for successful meet-the-buyer occasions through market-focused relationship development with distributors, specialist retailers, and other retail and food-service buyers in the domestic and international markets.
- Investment in small-business specific consumer and market insights.
- Create a sector strategy for small business that articulates a market-driven vision and identifies the needs and opportunities for players in the sector, and the platforms for growth according to their business stage – start-up markets/market ready/export – and which sets out the targets for the development and progression of these companies in the timeframe to 2025.
- Shorten supply chains by increasing awareness of the value of buying fresh local produce.

Beverages Sector

Ireland's drinks industry continues to flourish with a large number of new entrants in the whiskey and craft beer sectors. Irish whiskey is the fastest growing spirit in the world and the focus for the category is on expanding market entry opportunities. Generating scale is the ambition for the embryonic craft beer entrants to ensure continued growth.

The beverages sector continues to drive the growth of the Irish food and drink industry, with exports of €1.26bn in 2015.

Irish whiskey, though still dwarfed by its Scottish rival, is the fastest growing spirit in the world, recording average annual growth of 12% over the last decade. Whiskey exports continue to drive Irish beverage exports with double digit growth recorded again in 2015 to reach an estimated €410 million. This was driven by increased demand from North America.

Whiskey sales — plus the increasing range of craft beers and spirits — have helped offset lower beer and liqueur sales in the Irish alcoholic drinks sector.

Craft beer and spirits are making a significant contribution to the economy. There are currently over 60 Irish microbreweries, 40% of which export, and the number is expected to exceed 100 by 2020.[28]

Meanwhile, the strong export performance of waters and juices has helped the non-alcoholic beverages sector.[29]

Actions:

- Support companies to sign up to Origin Green.
- Assist in doubling whiskey exports from 6 million cases to 12 million cases annually.
- Emphasise the provenance of Irish products — and the quality of natural Irish resources such as water and grain.
- Work with industry and other state agencies collaboratively to develop an Irish whiskey and food pairing trail as a major tourist attraction and to differentiate Irish food and drink produce.
- Continue to support, protect and promote Ireland's spirit GIs (Geographical Indications).
- Facilitate the growth of the premium drinks category by providing market knowledge for the US market.
- Develop 'premium brand' labels to target newly affluent consumers in Asia, Latin America and Africa.
- Support the craft beer and spirits sector through mentoring schemes with established companies, e.g. members of the Irish Whiskey Association.
- Work with the hospitality sector to raise awareness about the quality of Irish whiskey through academy and training programmes.

Prepared Foods (PF)

A dual focus on domestic and international growth opportunities will be central to the continued growth of the Prepared Foods sector to 2025. In recent years, changing market structures and formats have provided an opportunity for companies to add value to and differentiate their product offer from competitors. Innovation and emerging markets represent other platforms to increase the value of the sector over the next ten years.

The Irish prepared foods sector consists of some 275 companies, producing baked goods, confectionery, snacks, ambient groceries, chilled foods, ready meals and cooked foods.

Exports were steady in 2015 at €1.8bn. While the sector faces the twin challenges of increased competition and increased pressure on prices and margins, it has further potential to scale, providing greater employment opportunities in Ireland and a greater volume of exports.

Export growth in 2014 was driven mainly by sales of dairy based enriched powders to Africa and Asia. Bakery, chocolate confectionery and meat-based ingredients and meals also did well. Biscuits and sugar-based confectionery, on the other hand, reported falls in export sales.

The strongest performing categories were bakery and chocolate confectionery while sugar based products also recorded a rise. Declines were recorded in exports for dairy enriched powder exports and sauces The UK was the highest performing destination which recorded a growth of around 18% offsetting a sharp decline in trade to international markets.

Actions:

- Help all companies to sign up to Origin Green.
- Maximise the use of Origin Green and Quality Assurance programmes to differentiate Irish produce.
- Align the definition of PCF with that of other government agencies and co-ordinate the approach accordingly.
- Support the securing of funding so PCF companies can survive and grow.
- Assist where possible in reducing costs by introducing competitiveness improvement measures.
- Leverage the retailer relationship to increase domestic and export market share.
- Renew focus on R&D and innovation, and on developing skills and capabilities in PCF companies.
- Continue to focus on indigenous Irish companies that are open to exporting to new markets, increasing where possible, the resources to help them.
- Conduct market prioritisation studies that go into great detail for the PCF category.
- Simplify the navigation of new entrants into the sector via joint annual inter-agency food and drink platforms.

Horticulture

Edible and amenity horticulture is well positioned to take advantage of the opportunities that now exist through the promotion of locally and sustainably grown produce, the health credentials of increased consumption of fresh produce and gardening activity, new product offerings through innovation and greater collaboration within and across the horticulture supply chains. Origin Green will address customer and consumer demands in terms of sustainability and this will be a priority for the Irish horticulture industry.

In 2014 the farmgate value of Horticultural output was €407m. The key crops in the food sector include Mushrooms, Potatoes, Field Vegetables, outdoor Fruit and Protected Crops with a combined output value of €365m.

The key crops in the amenity horticulture area include nursery stock production, protected flowers/ ornamentals, christmas trees, cut foliage and bulbs, with a total value of €42m. Key challenges for the horticulture sector include a highly competitive retail market, costs of production, scale and international competition. Opportunities exist through the promotion of locally and sustainably grown produce and the health benefits of increased consumption of fresh produce and gardening activity. Through new product offerings and innovation, and through greater collaboration within and across the horticulture supply chains, the opportunities can be realised.

The key market for the horticultural industry is the domestic market. The key outlet for fresh produce is the domestic retail market. The total retail fresh produce market in 2014 was valued at €1.21bn. The market compromises vegetables (€509m), fruit (€557m) and potatoes (€142m). The other notable outlet for fresh produce is the food-service sector, which is valued at €300m at wholesale prices.

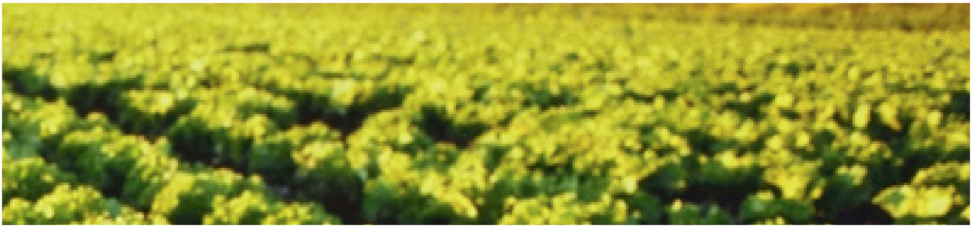
The market for amenity products and services offered by this sector is focused to a large extent on the domestic market. The retail market is serviced by garden centres, DIY shops. lifestyle centres and supermarkets. Bord Bia research estimated the value of the gardening retail market at €631m. In addition the commercial gardening and landscape market, which includes landscape designers and contractors,is an important part of this sector.

The main exports are mushrooms to the UK market, which takes three quarters of the domestic production valued at €115m. Exports of amenity horticulture crops were valued at €14.4m in 2014. Most export sales are achieved in the UK. Small quantities of young plants (plugs and liners) are sold further afield, where the higher value to volume ratio supports transport costs. The development of new plant varieties through micro propagation continues to generate additional export income through the licensing of intellectual property to foreign growers.

Horticulture

Actions:

- Maximise the range and volume of products that carry the Bord Bia Quality Mark on the retail shelf.
- Support all horticulture processors and packers to sign up to Origin Green.
- Roll out the Origin Green programme to horticulture producers with business and environmental measures that will underpin the sustainability credentials of the industry.
- Continue to invest in market insight in the form of data on and analysis of developments in amenity markets and retail, and food-service trends to identity and exploit opportunities.
- Collaborate fully with industry groups and across horticulture supply chains (including producer groups). Continue to encourage and develop group initiatives.
- Prioritise product and plant innovation and maximise the potential support available for plant innovation.
- Examine with other state agencies what actions can be taken to minimise the impact weather-related events/climate have on the output of the sector (e.g. training, research into production techniques/ varieties that can add value), supported by relevant market research.
- Continue to play a leading role in the co-ordination, development and roll-out of both consumer and trade promotions for the horticultural industry across all sectors.
- Establish an industry funding mechanism (levy) to promote horticultural products.
- Implement a major three-year promotion of potatoes (2015-2018) in the domestic market with matching EU promotional funding.
- Increase the use of Irish-grown potatoes in processing and salad markets.
- Continue berry promotional activity to drive maximum benefits for the Irish production base. Consider expanding to other berries in line with the demand for such fruit.
- Examine opportunities for collaboration with the DAFM and other departments and state agencies in the promotion of fresh produce and its role in a healthy, balanced diet.
- Develop Bloom further as the major showcase of Irish horticultural production, landscape design and construction.
- Build on the existing new Gro Mor gardening promotion initiative which is being implemented by The Garden Centre Group under the umbrella of Retail Excellence Ireland (REI) and being supported by Bord Bia and the growers.
- Continue to implement the Food Dudes Programme and develop the delivery



model to make it available to all national schools that wish to participate in it on an ongoing basis.

- Explore the potential for expanding the evidence-informed 'food in schools' programmes.
- Continue the Supplier Development Programme, which offers training, mentoring and forums for discussion on a range of subjects and enables participants to gain up-to-date skills to manage their businesses, promote best practice and production skills, and increase sales.
- Continue to support GLAS (the Garden Landscape Amenity Showcase) to promote the best of Irish horticulture in an environment geared for business and networking.
- Promote attendance at national plant fairs as an opportunity for nurseries to present their products to buyers, especially garden centres in Ireland.
- Expand the Amenity Export Programme for horticulture business owners to build on existing export sales or enter export markets for the first time, carefully reviewing and supporting in terms of investment requirements and priorities.

Appendix 1: Methodology

The research and participant engagement which underpinned this project was done in partnership with The Futures Company in 2015.

The project involved three distinct stages of work:

1

Scan and Engage: A phase of research and horizon scanning designed to identify the major macro drivers of change with the potential to reshape the Irish food system over the next decade. The drivers were identified through a combination of desk research and engagement with a range of experts and industry stakeholders.

2

Future Vision Development: A series of workshops with industry stakeholders where the major macro forces of change were reviewed and their potential impact on the future for the Irish food and drink industry assessed. This phase of work also involved the collaborative development of a draft vision for the Irish food and drink industry over the next decade.

3

Industry Actions: A second round of stakeholder engagement tested the draft vision, and identified a series of actions for the industry to take forward.

Appendix 2: Project participants

We wish to thank the following participants, who contributed their time and energy to the project:

Ballymaloe Country Relish
Britvic Ireland
The Burren Smokehouse
Butlers Chocolates
Carbery Group
Cashel Blue
Chapter One Restaurant
Country Crest
Department of Agriculture, Food and the Marine
Darina Allen
Dawn Meats
DCC
Diageo
Drumshanbo Distillery
Dublin Nutrition
First Ireland Spirits
FitzGerald Nurseries
Glanbia Consumer Foods
Glanbia Ingredients Ireland
Glenilen Farm
Glenisk
GMIT
Goatsbridge Trout Farm
Ibec
Irish Country Meats
Ornua
Irish Distillers Pernod Ricard
Itsa Bagel
James Whelan Butchers
Joseph Brennan Bakeries
Keoghs Farm
Kepak Group
Kerrigan's Mushrooms
Kerry Foods
Manor Farm
Marine Harvest
Miele
Monaghan Mushrooms
Natashas Living Foods
NUI Maynooth
The Nusli Company
Product Design
Sheridan's Cheesemongers
Biz Growth Media
St Tola Irish Goats Cheese
The Apple Farm
Total Produce
University College Dublin
Walsh Whiskey Distillery

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Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board