



# Bord Bia

## Menestyksellistä ruokavientiä kestäväen kehityksen periaatteella

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17.5.2023



Euroopan maaseudun  
kehittämisen maatalousrahasto:  
Eurooppa investoi maaseutualueisiin



2023



Elinkeino-, liikenne- ja  
ympäristökeskus

**FENNO  
PROMO**

In 2022 Ireland exported

**€16.7 Billion**

of Irish food and drink  
Worldwide



**187**  
countries



**Exports 90%**

Ireland exports about  
90% of its food and drink  
production



**€45 million**  
a day



**+22%**

Compared with 2021, with  
notable growth across  
almost all sectors

**BORD BIA**  
IRISH FOOD BOARD

BORD BIA

Strategically  
Growing the  
Irish Food  
Exports



Source: [Board Bia](#) 2023

# Why So Successful?



Sector  
deep- dive

(Dairy vs. Beef vs. Seafood)

Understanding  
markets

Data

Insights

Change  
Innovation  
Customers



# Why So Successful?

Data driven

A clear shorter term and longer terms plans

With clear objectives and deliverables (headlines and details)

Commitment both on government and industry side to joint targets

All targets are of monetary value, measurable

Ambitious targets – aim high, achieve more

A fearless approach - they are not afraid of setting big targets

Doing together as an industry and as a joint brand – stronger together, clear messaging [www.irishfoodanddrink.com](http://www.irishfoodanddrink.com)

A bigger team will attract a bigger audience – especially making it worthwhile for the buyers

Simple offering! Specialisation! Clear messaging!

**What can Finland learn from Ireland's success? Can Finland follow the suit?**



Source: [Board Bia Strategy](#)



# Winning with Smart Differentiation

2021–2031 is the decade of **expertise and specialism**, rather than generalists. Over the next ten years manufacturers and producers will have to tailor their offer to ever more demanding consumer cohorts. The era of mass-marketing is ending, targeted solutions for often very polarised groups will be the order of the day.

Source: [Board Bia Strategy](#)





# Building Bord Bia's Strength In Sustainability

We enter a decade in which sustainability will become the defining issue from an ethical, economic and social viewpoint. What is right for the earth is right for its consumers, because healthy and resilient societies must give space to nature.



# Background

Agriculture was Ireland's largest indigenous industry. No heavy industry.

2/3 of the land used for agriculture

Ideal for growing grass: fertile soils, a temperate climate and abundant rain (80% usage)

Food & Drink export growth: 2009: €7 bn -> 2017: €12.5 bn -> 2022: € 16.7 bn

One of the fastest growing sectors in the Irish economy

Accounting for 11% of total exports in 2017 (an increase of 74% between 2009 and 2017).

It provided 8.5% of national employment, rising to 10% when employment in inputs, processing and marketing was included.

Dominated by beef and dairy

Multinational food companies and brands such as Nestlé, McDonald's, Burger King, Subway and Danone all sourced food and ingredients from Ireland.

Ireland also had a successful branded spirits and drinks industry



# 10 Year 'Food Wise' Plan -> 2025

Founded in 1994. 100 employees. Promotion, trade development and marketing of the Irish food, drink and horticulture industry. Public-Private.

Led by Tara McCarthy 2017-2022. **New CEO Jim O'Toole.**

Department of Agriculture, Food and the Marine (DAFM) 10 year "Food Wise" plan for the agri-food sector set out an ambitious growth target of **€19 billion in total food exports by 2025:**  
+ strategic priorities on route to market, consumer market insight, reputation and talent  
+ Bord Bia had driven significant advances by helping Irish food and drink stand out to buyers in international markets e.g. the Origin Green program, a bold initiative that provided the food and drinks industry with an infrastructure with which to measure and guide the improvement of its sustainability performance

**Bord Bia's Statement of Strategy 2019–2021** was keenly focused on the global potential of Irish exports against a backdrop of consumer trends:

- + a shift towards less but better meat consumption and
- + a concern for global climate change (and an external environment characterized by protectionism)

Worries: - **Brexit / Ireland's oldest and largest trading partner (36% of agri-food exports)**  
- US vs. EU trade disputes threatening Irish Whiskey

Source: [Board Bia Strategy](#) and [HBS CASE Bord Bia](#)





# Strategic Priorities 2022-2025

Bord Bia's three year strategy **highlights a clear road-map** for the organisation around the world. Bord Bia has set out **clear business objectives** for each key sector and **will deliver on these objectives against a number of core strategic questions**. The new Bord Bia strategy **identifies five 'jobs to be done'** by the **Bord Bia team**



Source: [Board Bia Strategy](#)



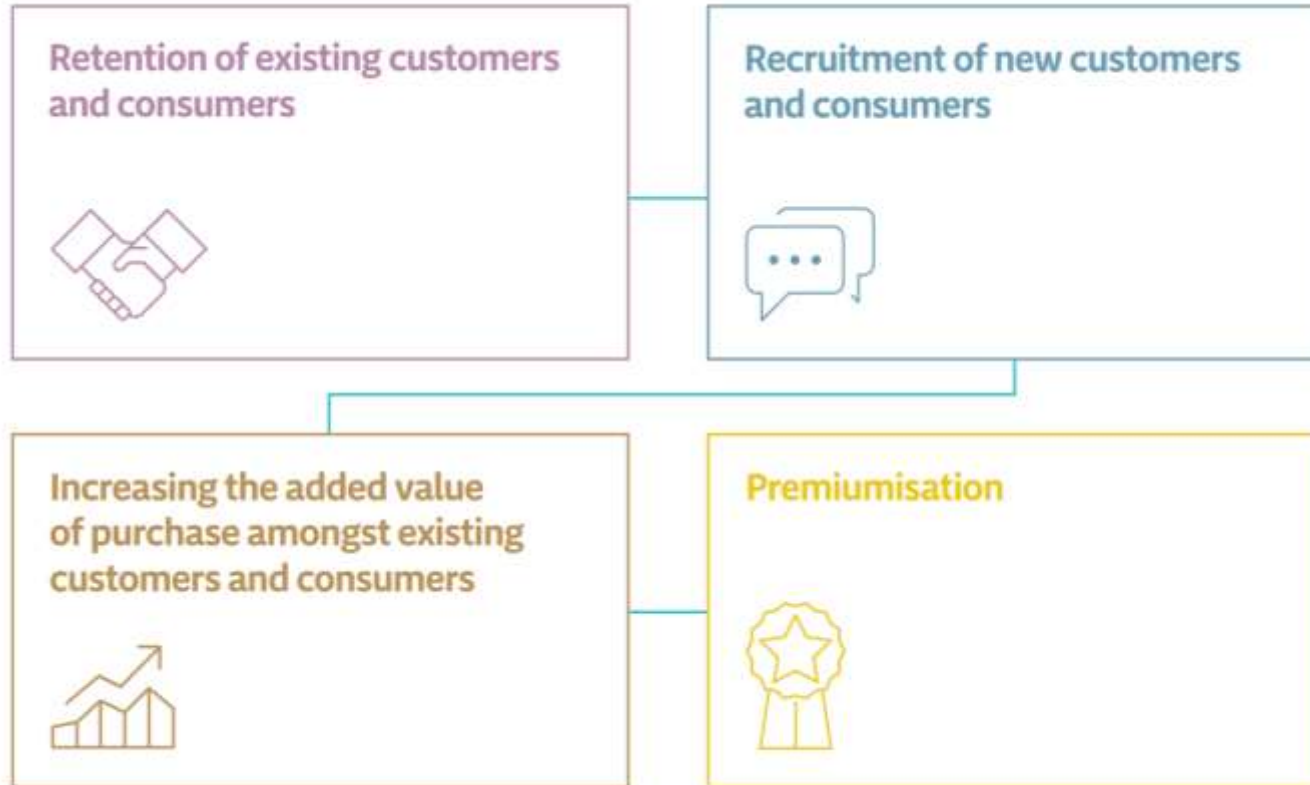
# Strategic Priorities 2022-2025

These five strategic priorities will drive all that we do in achieving our objectives in the 2022-2025 period.

1. Build Food Brand Ireland and further develop its proof points
2. Develop Better Ways for our clients and customers to Connect and build Partnerships
3. Nurture and Attract Industry Talents and Drive Client Capability
4. Champion Insight-Led Innovation and Brand Development
5. Support and enable the organisation and to execute strategy



# Core Strategic Questions to Answer in Order to Be Able to Deliver on Objectives



# Next 10 Years 2022 ->

Our 10-year strategy reflects and builds on the wider ambitions outlined in Food Vision 2030 to help achieve the vision, that over the course of the next 10 years Ireland will become a world leader in Sustainable Food Systems (SFS) *the leadership position* the country will take up will provide the *basis for future competitive advantage*.



# Next 10 Years Strategy 2022 ->

Winning With Smart Differentiation  
Building Our Strength in Sustainability  
Reinforcing Sustainable Nutrition  
Optimising Re-imagined Channels  
Fostering Holistic Collaboration



# St Patrick's Day Global Promotions

“St. Patrick's Day is a globally renowned festival and provides the industry with a wonderful opportunity to maximise the excellent reputation of Irish food, drink and horticulture and to showcase Origin Green - Ireland's national food and drink sustainability programme - abroad. Through opportunities with existing and new customers Bord Bia will engage in senior level trade meetings, online campaigns, retail and restaurant promotions, in-store tastings, cookery demonstrations, media briefings, and on-the-ground Irish food festivals, *all with an aim of increasing the global footprint of Ireland's food and drink industry.*”

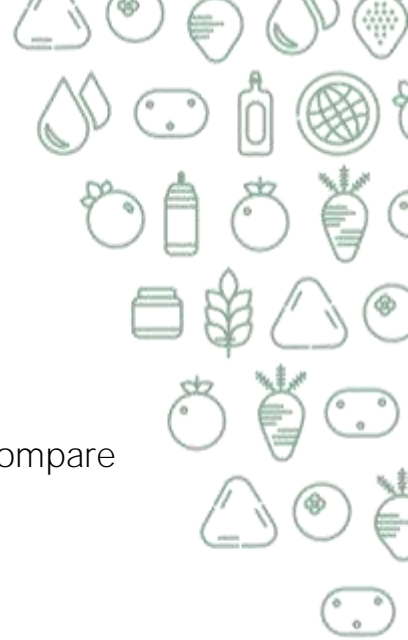




# Data example

Every month, Bord Bia interviews 375 grocery shoppers in key European markets: Ireland, the UK, the Netherlands, Germany, Belgium, Italy and Sweden; in order to understand key dynamics around buying proteins.

We have been collecting these insights since Autumn 2019, allowing us to reliably compare trends in consumption, purchase patterns and

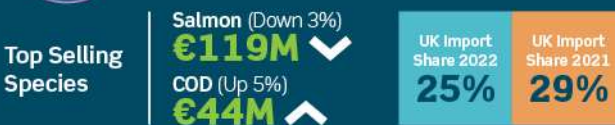


# €1.3 billion

Estimated GDP of Irish Seafood industry



## The Irish Seafood Economy 2022



## Our Biggest Fishing Ports (Value of Landings)



Irish Seafood exports increased to **€530 million** in 2022

New CEO is a former CEO of Bord Bia, Mr Aidan Cotter



## 4 Marketplaces of Tomorrow

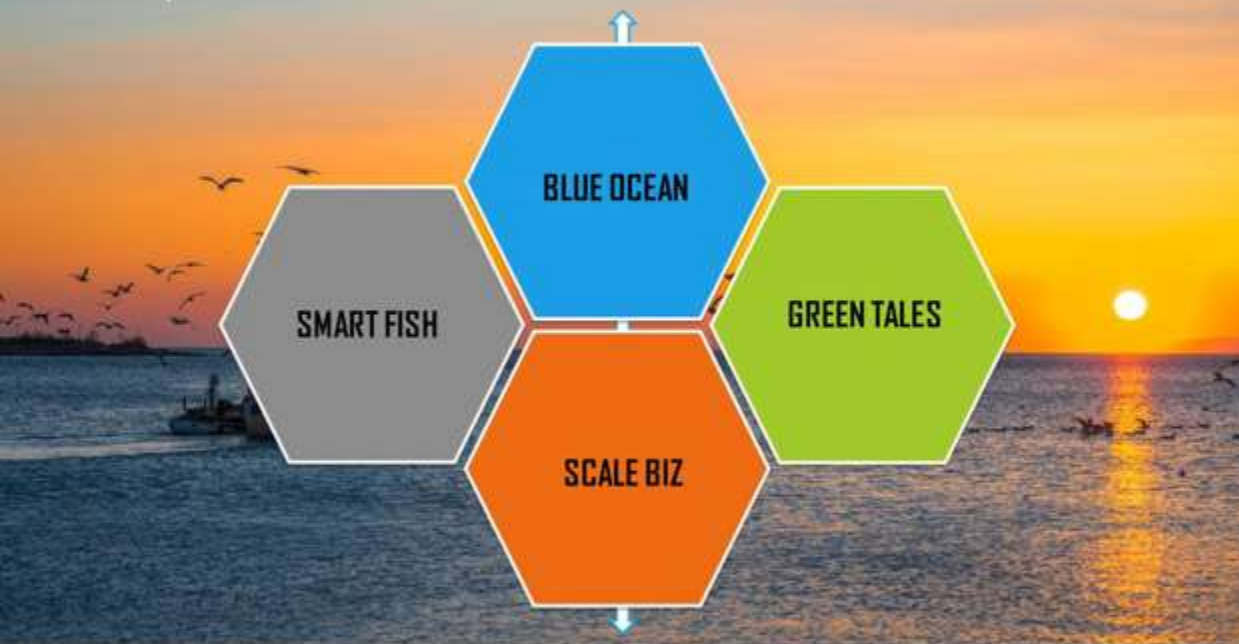


Image by: Bord Bia

**Bord Bia's study**, Seafood Futures: Four Marketplaces of Tomorrow has been designed to explore what viable strategic (including innovation) choices, tapping into valuable growth areas, would create a decade of sustainable growth for Irish seafood. The purpose of the study was to develop a tool that would provide the direction and highlight the clear, **'where to play: how to win'** opportunity areas. In the creation of this tool, we have combined strategic growth models with the future scenarios and drivers of demand, to really understand what the 'Marketplaces of Tomorrow' might look like



# Seafood Futures: Four Marketplaces of Tomorrow

1. Smart Fish will feature a blended or hybrid approach of smart pricing and product differentiation. It will seek to create value through supply chain innovation and growth in new models and efficiency technologies. Whilst there will be great product at smart prices, the sustainable benefits will be hindered for most.

2. Blue Ocean will leverage similar or adjacent resources to diversify into high value categories with greater protection of margins. Investment in new and emerging blue economies will bring about new opportunities beyond increasingly under pressure fishing. Innovation will play a significant role in finding new yields beyond traditional fishing and breakthrough IP will drive considerable value in knowledge based economies.

3. Green Tales will see focused differentiation within the Sustainability marketplace. The demand for natural and sustainable seafood will have accelerated to a point of premiumisation and luxury. To command a higher price, sustainability will need to be owned throughout the value chain and delivered by marrying innovation and technological breakthrough.

4. Scale Biz is a marketplace of consolidation and collaboration, where economies of scale drive competitive advantage in the production of cheaper protein as an undifferentiated commodity. We must be mindful that just as there is today, there will still be a role for cheaper protein. For some consumers, they will want stable, secure, cheap protein and the niceties will be forgotten. To meet this, sustainable innovation will have unlocked the power of affordable aquaculture to become a significant provider of global protein.

Source: [www.bordbia.ie/industry/news/insightful-articles/2021/seafood-futures-four-marketplaces-of-tomorrow](http://www.bordbia.ie/industry/news/insightful-articles/2021/seafood-futures-four-marketplaces-of-tomorrow)



# Events (Expos and Conferences)

Conferencies are great places to learn and network. Exhibitions are great places to see in practice the latest innovations, product launches etc. They now also offer fantastic lectures. Exhibitions are typically free, but conference entry prices vary from hundres to thousands

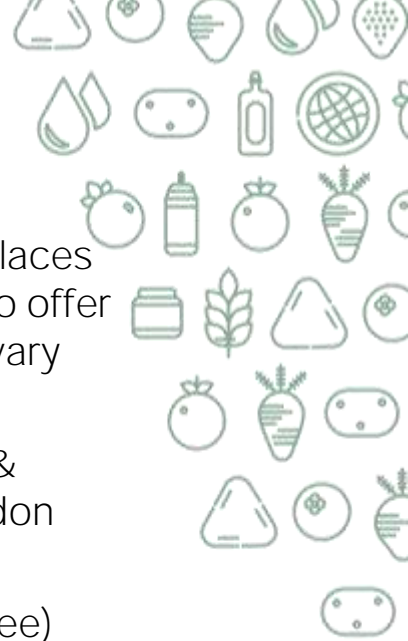
Speciality and Fine Food [www.specialityandfinefoodfairs.co.uk](http://www.specialityandfinefoodfairs.co.uk) and Natural & Organic Products Europe [www.naturalproducts.co.uk](http://www.naturalproducts.co.uk) 11-12 Sep 2023. London Olympia (expo, free)

Lunch Show [www.lunchshow.co.uk](http://www.lunchshow.co.uk) 27-28 Sep 2023. London Excel (expo, free)

Sustainable Food Event <https://sustainablefoodsevent.com> 6-7 Nov 2023. London Westminster (conference, £700-£1200)

IFE International Food and Drink Event [www.ife.co.uk](http://www.ife.co.uk) 25-27 March 2024. London Excel. (expo, free)

Food and Drink Expo [www.foodanddrinkexpo.co.uk](http://www.foodanddrinkexpo.co.uk) 29 Apr – 1 May 2024. Birmingham NEC







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