

# **BORD BIA**

## **IRISH FOOD BOARD**

### Bord Bia Annual Report 2023

# Bord Bia's Purpose

**Bord Bia's purpose is to bring Ireland's outstanding food, drink and horticulture to the world, thus enabling the growth and sustainability of producers.**

## Statement of Strategy

Bord Bia's vision for the Irish food and drink industry is for differentiated, sustainable growth, as articulated in the Bord Bia Statement of Strategy 2022-2025:

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.

Irish food producers set the global standard in sustainable production, meeting the responsibility that everyone has to the planet, to society and to future generations.

Ireland has everything it needs for a better, more sustainable food system. There has never been a better time for the Irish food, drink and horticulture sector to set an example for the world.

Bord Bia has five strategic priorities for the 2022-2025 period:

1. Build Food Brand Ireland and further develop its proof points
2. Develop better ways for clients and customers to connect and build partnerships
3. Nurture and attract industry talent and drive client capability
4. Champion insight-led innovation and brand development
5. Support and enable the organisation and its stakeholders to execute strategy

# Presentation to the Minister for Agriculture, Food and the Marine

In accordance with Section 22 of An Bord Bia Act 1994, the Board is pleased to submit to the Minister the Annual Report and Accounts for the 12 months ending December 31st, 2023.

Larry Murrin  
Chair (designate)

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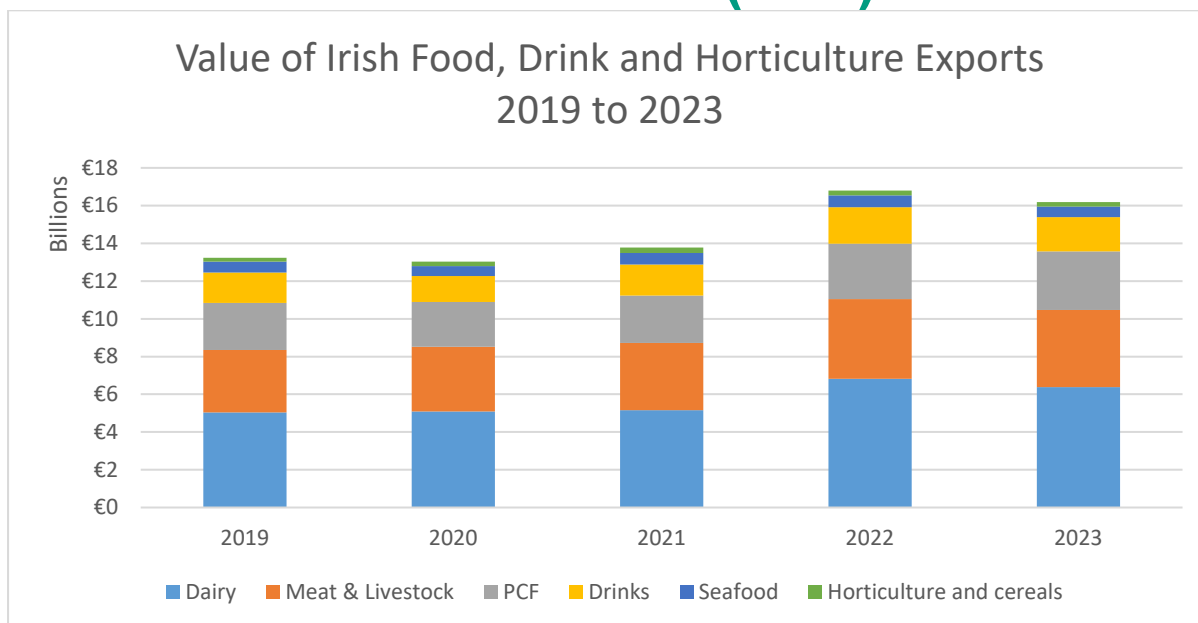
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# Exports of Irish Food, Drink and Horticulture (€bn)



Source: <https://www.bordbiaperformanceandprospects.com/>

The value of Ireland's food, drink and horticulture exports declined by 4% to €16.2 billion in 2023. This equates to almost €44 million every day in exports to customers in more than 180 countries worldwide.

Overall, exports retained the majority of the 2022 gain, however the industry faced challenges on input costs and shifting global commodity demands. Primary producers were impacted by severe weather conditions throughout 2023, while the cost-of-living crisis reduced consumer spending in certain export markets and is reflected in the overall export performance.

The dairy sector, which was worth almost €6.4 billion in 2023, remaining the largest element within Irish food and drink exports, followed by meat and livestock, which generated approximately €4.1 billion in export sales, and prepared consumer foods, which was worth €3.1 billion.

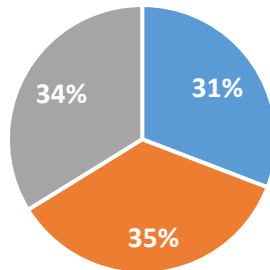
In 2023, 31% of Ireland's food and drink exports were exported to international markets outside of the EU and the UK, while 35% went to the EU and 34% to the UK.

The EU was the largest single regional destination for Irish food, drink, and horticulture, though the value of exports to the EU declined by approximately 4% to approximately €5.7 billion in 2023. The value of exports to the UK was €5.5 billion, representing a slight increase of almost €45 million on the previous 12 months.

Export values to the US market saw a decline of 8% compared with 2022. This was largely due to a decline in whiskey exports, which were down by 22% or almost €122 million. The value of exports to Africa declined by 17% to €880 million, while exports to Asia were down nearly 10% to approximately €1.3 billion. Exports across almost all of the key Asian countries were down when compared with 2022 including China.

## Export Destinations

## Destination of Irish Food, Drink and Horticulture Exports in 2023



■ International markets ■ EU27 ■ United Kingdom

Source: <https://www.bordbiaperformanceandprospects.com/>

Category	FY 2021	FY 2022	FY 2023	% change YOY	% change 2023 v 2021
Dairy	€5,167,217,625	€6,817,997,744	€6,386,877,254	-6%	24%
Meat and Livestock	€3,551,411,323	€4,231,666,284	€4,079,538,791	-4%	15%
<i>Beef incl. offals</i>	€2,268,655,927	€2,806,274,969	€2,764,716,603	-1%	22%
<i>Pigmeat</i>	€530,936,507	€544,741,416	€460,617,620	-15%	-13%
<i>Sheep</i>	€408,502,412	€471,671,347	€430,715,420	-9%	5%
<i>Poultry</i>	€125,738,136	€160,595,817	€153,092,290	-5%	22%
<i>Live Animals</i>	€214,000,000	€243,166,330	€265,158,347	9%	24%
<i>Other meat</i>	€3,578,341	€5,216,405	€5,238,511	0%	46%
PCF	€2,515,175,118	€2,938,128,530	€3,113,810,570	6%	24%
Drinks	€1,650,737,755	€1,919,265,141	€1,802,720,623	-6%	9%
Seafood	€608,183,617	€640,541,666	€558,920,327	-13%	-8%
Horticulture and Cereals	€291,021,048	€257,095,202	€247,123,858	-4%	-15%
<b>Total</b>	<b>€13,783,746,486</b>	<b>€16,804,694,567</b>	<b>€16,188,991,423</b>	<b>-4%</b>	<b>17%</b>

Source: <https://www.bordbiaperformanceandprospects.com/>

## Sectoral Analysis

### Dairy

The **dairy** sector, which accounts for almost 40% of overall Irish food and drink exports, saw export values decline by 8% to €6.3 billion last year.

The decline in the value of butter and casein exports was partly offset by increases in the value of cheese, specialist nutritional powders and yogurt. In 2023, Domestic Milk Intake was estimated at almost 8.5 billion litres, a decline of 365.5 million litres (-4.1%) when compared with 2022.

Both butter and cheese exports exceeded €1bn for the third consecutive year. The EU, United Kingdom and North America remain the key markets for Irish butter, accounting for 92% of exports. The UK's share of Irish butter exports in value terms declined to around 13% in 2023, down nearly five percentage points on the prior year. For cheese, exports increased by 5% with the EU, North America, Middle East and the UK contributing to this growth in value. While in volume terms the EU and UK were the largest contributors to growth with both destinations increasing by 10% approximately year on year.

Exports of casein were worth €540 million in 2023 a decline of 21% on the prior year. The key driver was a significant devaluation in unit prices compared with prices available in 2022, in part attributable to a focus on moving high price inventory through businesses as quickly as possible.

Exports of specialised nutritional powders increased by almost €80 million in 2023 to a value of approximately €834 million. The increase in exports to North America recorded in 2022 was retained.

### Meat and Livestock

The total value of meat and livestock exports declined by 4% to €4.1 billion in 2023.

Exports of primary beef saw a decrease in value of nearly 2% to €2.6 billion. Though beef export volumes were down by more than 3%. Hence an improvement in unit pricing helped to partially offset the decline in export volumes. A decline in cattle throughput and lower carcass weights of animals due to reduced animal performance arising from poorer quality grass for much of the summer in 2023 and lower concentrate usage are believed to have contributed to this decline in volume.

While EU beef production remained tight in 2023, the inflationary impact on consumption moderated demand for beef, with consumers turning to lower cost proteins. Demand for manufacturing beef, which had underpinned high beef prices throughout the UK and Europe in 2022, eased in 2023, partially due to the fact that stocks had been rebuilt post Covid-19 but also as a result of weaker retail demand for burgers and grilling products due to poor weather during the summer season.

The value of primary pigmeat exports decreased by 15% to €461 million, as higher prices helped to partially offset a reduction in export volumes with export volumes declining by more than 20% compared with 2022. Changes in international market demand combined with higher costs of production over the last number of years has challenged the EU pigmeat supply chain. While shipments of Pigmeat to Asian markets which remains the largest export destination have declined with this region now accounting for 34% of exports in value terms, down more than six percentage points on the prior year.

The value of sheepmeat exports declined by almost 9% to €430m while the volume of exports was 73,000 tonnes down 4% on 2022 levels.

Shifts in global demand combined with increased production in the southern

hemisphere and a notable increase in the availability of UK sheepmeat in our key export markets, all created challenges for Irish exporters. A larger carryover of hoggets into 2023 boosted Irish sheepmeat production in the first half of the year, with the increased supplies putting some downward pressure on the deadweight trade. As we moved into the second half of 2023, lamb supplies for processing tightened significantly and helped keep a floor under the lamb trade with prices operating in line with the corresponding period in 2022.

Irish poultry exports decreased by 5% in value terms to €153 million during 2023. The Irish poultry industry benefitted from firm demand, combined with lower disease pressure in the sector. For the main subcategory, chicken, output had increased. This reflects firm demand, with more dark chicken being sold on the Irish market as price sensitive consumers continue to seek value.

The live export trade continues to provide an important alternative market for the Irish livestock sector with exports in 2023 valued at €265m. This represents a 13% increase on 2022. Cattle exports account for the majority of the live export trade with 332,000 cattle exported during the year, valued at €190m. Tighter cattle supplies in mainland Europe, combined with the positive reputation of Irish livestock with existing customers, contributed to a 20% increase in calf export numbers. The Netherlands was the strongest market for dairy male calves in 2023 with 110,000 calves traded to the region, accounting for more than half of all Irish calf exports. Meanwhile Spain has also remained an important market for both dairy and beef sired calves with 60,000 calves exported.

### Prepared Consumer Foods (PCF)

PCF exports, including ready meals, pizzas, soups, and baked goods, increased by 6% in value in 2023 to €3.1 billion. Inflation continues to dominate the trading environment for this sector. The UK continues to be the most important market accounting for 64% of

exports. Exports to Northern Ireland and Great Britain were valued at almost €600 million and €1.5 billion respectively to total €2.1 billion for the UK market, representing a value increase of more than 4%.

Constrained consumer spending and a competitive environment put pressure on companies to manage margin and volume, ultimately defined the 2023 performance. Those companies that aligned and partnered with customers to respond to the market have seen, and will continue to see, growth pathways.

### Drinks

The value of drinks exports declined by 6% to €1.8 billion in 2023.

One of the key factors for Irish drink exports in 2023 was a decline in value of exports to the key market of North America. Total drink exports to North America were down by approximately 17% overall. The fall in exports of Irish whiskey in particular to North America are due to a number of factors which culminated in 2023. There was a build-up of stock in the market in 2022 to mitigate supply and trading challenges through the Covid-19 period, as the market started to open up. There was also a deceleration in depletion rate in the first half of 2023, as consumers felt the squeeze of higher inflation and increased interest rates. The final factor affecting exports was the cost of credit. With interest rates in the US at 5.5%, importers and distributors were reluctant to hold stock at previous levels.

The recovery of Irish beer exports to €320 million builds on the recovery in exports in 2022, with exports now exceeding 2019 levels by almost 5%.

### Seafood

Overall primary seafood exports were estimated at €450 million in 2023. Value-added seafood products declined by 10% and were valued at €110 million. Combined overall seafood exports were €560 million, which represents a decline in value of 13% over 2022.



Declines in pelagic and salmon exports were largely responsible for the reduction while shellfish exports also fell by around 8%. Whitefish exports showed modest growth in value.

Total volumes exported were down by almost a quarter. The fall in pelagic exports was due in part to another cut of 5% in the mackerel quota because of the Trade and Cooperation Agreement (TCA), a declining quota for horse mackerel and a reduction in foreign landings. UK vessels are now required to land 50% of their catch into UK ports which leaves less volume for Irish processors to access.

Shellfish exports were stable in volume and back 8% in value reflecting a slight weakening in unit prices, especially for higher value species due to ongoing cost-of-living crisis across key export markets.

Exports of value-added seafood products were nearly 10% lower at €110 million but remain 12% ahead of 2021 levels. This is seen as a pause in the trend of recent years where there has been strong growth in value-added

products, such as consumer ready, cooked, ready to cook/ready to eat or smoked seafood products. The core region for value-added seafood exports is the EU-27 which accounts for more than 70% of value-added exports. The UK market accounts for approximately 17% of exports in this category and showed strong value and volume growth during 2023.

### Horticulture and Cereals

Total horticulture and cereals exports were valued at €247 million in 2023, representing a 4% year on year decline.

The mushroom sector had a reasonable year in the UK, the main market for Irish mushrooms, where sales saw a decline of 8% in value despite a 12% reduction in export volumes to the UK, reflecting price increases achieved during the year. The sector is performing slightly behind the overall vegetable category in value and volume terms. However, it was not subject to the same weather disruptions in 2023 as other produce due to their production taking place in a controlled environment.

# Chairperson's Statement

## Introduction

While the success of Irish food, drink and horticulture on the international stage is invariably a reflection of supply and demand, more complex dynamics are often at play. Rarely has this been more clearly the case than in 2022 when a year of extraordinary value growth was also a time of concern and caution for many in the industry. Strong growth was anticipated at the start of the year as suppliers looked to the opportunities presented by the falling away of pandemic era restrictions and the return of foodservice opportunities.

However, it was war in Ukraine that set the narrative for the year, upending global political norms and sending energy and input costs soaring. This inflationary environment had a deep impact on all of us, and on the food, drink and horticulture sector in varied and sometimes unpredictable ways. Natural gas is, for example, not only an important source of power for the industry in its own right but central to fertiliser production, meaning energy cost increases impacted every aspect of the supply chain. The situation not only presented a challenge to competitiveness directly, it also had a powerful impact on consumer sentiment and discretionary spend.

Supply chain issues, a legacy of the pandemic years, and the ongoing challenges of Brexit, added to the pressure on producers. In this unprecedented environment, the food, drink and horticulture industry's record-breaking performance, with exports increasing by 22% or €3bn to €16.7bn, must be seen as a powerful commendation of its enduring reputational strengths and agility in the marketplace as well as a positive signpost for the sustainable future we envision for it. The exceptional export performance of 2022 is also a reflection of our strengthened global reach, as diversification has extended our industry's footprint and helped in securing the unit price increases that were fundamental to its viability.

## Price and volume growth

Pressure on global dairy prices had a major impact on the industry's performance in 2023. At year's end, the Food and Agriculture Organization's (FAO) dairy price index was down 16.1% on 2022. This wasn't a story unique to dairy, as the FAO's overall price index fell some 10%. Cereal prices were also among those heaviest hit, down 15.4%.

Price deflation was not the only factor impacting Irish exporters. A fallback in drink exports, down 8% to €1.8 billion, was linked to a number of largely one-off factors in North America, principally related to the significant build-up of stock in 2022. An adept supplier response saw whiskey exports grow by 11% in the EU and by an impressive 19% to the UK. Beer and cider exports also had a strong year.

While there were variations within individual categories, the story for the meat and livestock sector was largely one of stability with overall export values down just 1% on 2022. The prepared consumer foods (PCF) sector confirms Ireland's ability to add value to its high-quality food supply and an increase in export values of 7% was welcome reflection of this. Seafood exporters however had a difficult year, with supply issues bringing values down 14%. In line with FAO trends, Irish horticulture and cereal exporters were down 6%.

The challenges of the year were reflected in a rebalancing of market share. Exports to the EU were down 2% on 2022 to be worth €5.8 billion or 34% of total market share. The UK retained its title as the largest single destination for Irish food, and drink exports, worth €5.6 billion and accounting for 34% of total exports. This was up 2% on 2022. International markets fell back by 10% in 2023 to €4.9 billion. In North America this related particularly to the drinks category while in Asian markets it was more broad-based. In all, some 30% of Irish food and drink exports reached international markets, down from 32% in 2022.

## Strategic direction

The Department of Agriculture, Food and the Marine's (DAFM's) *Food Vision 2030* is the strategic foundation for all Bord Bia's undertakings and designed to facilitate Ireland becoming a world leader in sustainable food systems by the end of this decade. Launched in 2022, *Nurturing a Thriving Future*, Bord Bia's operational strategy, operates over two complementary timelines:

- A 10-year planning cycle designed to ensure actions specifically assigned to Bord Bia by DAFM are acted upon in sync with *Food Vision 2030*.
- A three-year plan (currently 2022 to 2025) that supports the delivery of Bord Bia services over five strategic priorities, which Bord Bia internally calls its 'We Must Dos' ('WMDs'):
  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.

All actions undertaken in 2023 by Bord Bia aligned with these five WMDs and the Annual Report provides fuller detail of them, along with metrics that illuminate how they have supported the industry over the year.

Against unrelenting market pressures, the picture painted by 2023's activities is one of steadfast determination for Ireland to be recognised as a producer and supplier of world-class outputs. At a time when many in the industry were impacted by the harsh reality of global trading, I was encouraged to see the relationship between Bord Bia and primary producers receive significant attention. The launch of AgNav, in partnership with Teagasc, is an important development in itself and a signpost of intent for all future progress around sustainability. The securing of all-island Protected Geographical Indication (PGI) for Irish grass-fed beef in November successfully concluded a journey initiated in 2019. It will be a powerful resource in helping differentiate Irish beef's premium position in key markets in coming years.

The success of Bloom 2023 can also be noted as bringing a welcome 'feel good' factor to the year. Warmly received by the public, it remains a showcase of creativity and quality, with economic benefits reaching far beyond its five-day run. The latest iteration of the Consumer Lifestyle Trends Programme, Bord Bia Cultivate was just one example of the world-class research, insight and innovation initiatives delivered by Bord Bia's Thinking House, while our partnership in Food Health Ireland is helping advance a world-leading functional foods agenda.

## Global pressures

While high inflation and interest rates exerted a drag on the global economy, growth, albeit moderate, remained a feature of the year. The OECD put global economic expansion at 3% in 2023 and is predicting a decline to 2.7% in 2024. Ireland notably entered a technical recession towards the end of the year, although largely linked to its globalised multinational sector. According to the ESRI, modified domestic demand, a more accurate measure of domestic activity, grew 0.6%. Growth at a moderate level is expected across the economy in 2024.

The new Common Agricultural Policy entered into force on 1 January 2023 and can be seen as reflective of the era we live in, with its strong emphasis on supporting food production while addressing climate change and enhancing protections for the environment. It is expected to deliver some €9.8billion to Ireland's farming families and rural communities over the next four years.

After the steep decline in farm incomes in 2023, Teagasc estimates a welcome recovery of some 30% in 2024, with dairy and tillage the main beneficiaries. The long running saga of the EU-Mercosur deal, which presents potential disruption to Ireland's beef industry, is unlikely to see any significant progress until at least the new European Parliament is elected in 2024, while the election of a new president in the US could have a potentially seismic impact on the direction of US trade policy for the remainder of the decade.

Finally, while it may yet have no obvious impact on food production, 2023 will also be remembered as the year that saw the emergence of artificial intelligence (AI) as an extraordinary new reality. AI is predicted by many to be a driver of enormous change and disruption across the global economy in coming years with potential impact on millions of jobs and livelihoods. As such, it may be expected to play a role in how demand for our high-quality food, drink and horticulture outputs evolves in coming years.

## Appreciation and thanks

It was my great honour to be invited to serve as chair of Bord Bia at the beginning of 2024 and I was immediately conscious that I was having this baton passed to me from the most enormously capable hands. Let me express my sincere appreciation to my predecessor Dan

MacSweeney who served with distinction through some of the most turbulent years of recent history. I can only hope that, like Dan, I will be seen as someone who plays this role with vision and absolute dedication.

Far beyond the realm of the food and drink industry, the relationship between an executive and its board proved a topic of no small concern to the Irish public in 2023. It will be clear to all, now more than ever, that the successful stewardship of any organisation, but particularly one dependant on public moneys, is something that can never be taken for granted. In my time as chair, my goal is to foster a strong relationship with the chief executive, my fellow board members and to facilitate an atmosphere where robust and transparent discussions are facilitated and where matters of good governance are uppermost in the minds of all.

In this spirit, I look forward to working with CEO Jim O'Toole and his executive team, my fellow Board members and the members of the five subsidiary Boards. I also look forward to developing a strong working relationship with Minister for Agriculture, Food and the Marine, Charlie McConalogue and his colleagues Martin Heydon, T.D., Minister of State with responsibility for Research and Development, Farm Safety, and New Market Development and Senator Pippa Hackett, Minister of with responsibility for Land Use and Biodiversity. To the leadership team at DAFM, Teagasc, Bord lascaigh Mhara, Enterprise Ireland and others, I express my hope and expectation that Bord Bia will continue to work with all in a spirit of partnership, built on our shared passion for the sustainable success in this industry, and assure you of my commitment to this.

I would also like to recognise the primary constituency that I have been entrusted to represent and to speak for in this role – the farming and fishing communities of Ireland and the many thousands of people whose daily efforts in the wider industry supports families and communities across our island. In the role of chair, my hope, above all, is to serve the agri-food industry with the dedication and distinction it deserves and with the unshakable belief that its sustainable growth will be the basis for prosperity and wellbeing among these communities far into the future.

Larry Murrin,  
Chair (designate)

# Chief Executive's Review

## Introduction

The impact of high inflation and lower trade prices for key outputs exerted some force on food, drink and horticulture exports in 2023 – a challenging environment compounded by the bad weather and poor growing conditions facing many farmers. It was, somewhat inevitably then, a year of retrenchment for the industry, as the total value of exports fell 4% on the year earlier figure to €16.3bn. Pressure on global milk prices was the most notable contributor, but there were other variables at play, some more broadly spread and others more regionally specific. It is reasonable to reflect that, in almost all cases, they represented cyclical rather than structural impediments for our export sector.

The 2023 trading figures will also benefit from being viewed in the context of an industry that has enjoyed a strong performance for much of the last decade, and 2022 in particular, when exports grew by an exceptional 22%. The year 2023 was one in which most of our recent gains were consolidated, in often adverse circumstances. It was also only the second year ever when Irish food, drink and horticulture exports surpassed €16bn in value.

The challenges posed by soaring inflation may have lost their shock value but there was little respite from their impact. Record inflation, along with higher interest rates, have reshaped the global trading environment over the last two years. The scope available to exporters to recover cost increases varied by sector. Circumstances proved more favourable for the meat and livestock sector and prepared foods exporters, while beverage and seafood exporters had distinct market and supply issues to contend with. The year demonstrated once again the importance of diversification in supporting resilience and sustainable output.

It was encouraging to note, in this context, that amidst the challenges of 2023, the signal sentiment expressed by exporters was optimism for the future. Bord Bia's Exporter Sentiment study found the majority (73%) of Irish food and drink exporters to be optimistic about expected market growth in 2024, although 53% conceded rising energy prices, inflation and labour costs were impacting on

their competitiveness. Nevertheless, it would be impossible to ignore the harsh and immediate consequences faced by farmers as a result of the fall back in market prices over the year. According to Teagasc average farm income was down 44% in 2023, with dairy and tillage the most heavily impacted.

To all who work and make their livelihoods in this industry, I offer my assurance that Bord Bia continues on its focused and determined pathway, working to secure long-term sustainable value on behalf of the industry we serve. We believe our industry's continued focus on quality and excellence remains the strongest foundation on which to build that future.

## Guided by strategy

Bord Bia's role as the State agency entrusted with supporting market growth for our food industry is underpinned by our governing strategy *Nurturing a Thriving Future*. Entering its second year of activation in 2023, the strategy provides a robust and farsighted framework for all our activities and undertakings.

*Nurturing a Thriving Future* operates over a 10-year (2022-2032) and a three-year timeline (2022-2025). The former aligns with *Food Vision 2030*, the Department of Agriculture, Food and the Marine's (DAFM) strategy document supporting the development of Ireland as a world leader in sustainable food systems, and which recognises a key role for Bord Bia in the realisation of this vision.

Increased funding from DAFM to Bord Bia for 2023 represented an important vote of confidence in our role within the strategy. Bord Bia is grateful for the opportunity this presents to further embed sustainability and foster a growth-oriented outlook in the industry. Notable through our activities in 2023 was the strategic emphasis on outreach, education and relationship building with the farming community. The development of AgNav, in partnership with Teagasc and ICBF, also represented an important milestone in the progress of our sustainability initiatives. Recognising the many challenges this decade will continue to pose for our industry, work is already underway in the formulation of the next strategic cycle that will cover the years 2025-2028. I look forward to sharing details on this with our stakeholders in due course.

## Action and strategic priorities

The Annual Report provides an important opportunity to reflect on Bord Bia's performance over the year in terms of individual programmes, activities and actions, and to highlight measurable outcomes from them. All Bord Bia undertakings align with at least one of the five strategic priorities set out in *Nurturing a Thriving Future* – which we describe internally as our five 'we must dos' ('WMDs').

In what was my first full year in the role as CEO, I have been excited to bring leadership to this approach, and to support the executive team as they continue to bring value to industry through them. Like this industry, Bord Bia is now truly global in nature and a particular focus on the One Bord Bia operating model has meant our resources are utilised strategically and with maximum impact across a growing diversity of marketplaces.

### 'We Must do 1': Build Food Brand Ireland and further develop its proof points

- **Build Food Brand Ireland**

Food Brand Ireland (FBI) is a value proposition that articulates the naturalness and sustainability at the core of Irish food, drink and horticulture offerings. Against a background of sustained high inflation and some weakening of trade prices, FBI's value proposition remained central to our vision of growth for the industry.

Domestically, it was a year of strong and effective promotional work with lamb, eggs, chicken, pork and bacon, seafood and the Christmas season all strongly in focus. Bord Bia's ongoing support of the Quality Mark was recognised at the TAMI Ireland Awards 2023. Meat, dairy, seafood and horticulture were also the ongoing subject of highly targeted Business to Consumer (B2C) and Business to Business (B2B) marketing campaigns by our international teams. Bord Bia's success in securing and administering EU funded and co-funded campaigns continued, while a number of high-level trade missions played a part in strengthening the diversification of our export footprint. Bloom retained its position as a showcase and celebration of the best in Irish horticulture and our craft food and drink producers, with some 106,000 people attending

and the largest ever trade breakfast hosted. The year concluded with welcome news that Protected Geographical Indication (PGI) status has been granted for Irish grass-fed beef by the EU, creating a powerful marketing tool for the future.

### Ensure Origin Green supports development of Ireland's sustainable food systems

The launch of the Origin Green Academy provided the basis for sustainability-specific training programmes on a diversity of topics and, over the year, issues such as biodiversity, progress on net zero, sustainable packaging and the gender pay gap were all in scope. Collaboration between Bord Bia, Teagasc and ICBF led to the creation of the farmer-centric sustainability support framework AgNav, which will operate as an effective 'one stop shop' for climate action and sustainability improvements on Irish farms in coming years.

- **In partnership with Industry, build farmer advocacy for sustainable food**

An intensifying focus on farmer advocacy saw new modules introduced on the Bord Bia Farm Sustainability Learning Hub. A campaign to support farmers joining SBLAS delivered 900,000 online ad impressions while 34,000 farm members are now reached regularly via SMS with sustainability updates. Bord Bia's participation in the Sustainable Livestock Village at the Tullamore Show received positive feedback and there was a strong Bord Bia presence at events such as the National Ploughing Championships and Sheep 2023 Open Day.

### 'We Must do 2': Develop Better Ways for our clients and customers to Connect and build Partnerships

- **Develop transformative Relationship Marketing**

Developing deeper connectivity with clients and customers is key to Bord Bia's business development strategy. The year saw an intensive programme of highly targeted in-market events, sectoral seminars, top-to-top meetings, and B2B and B2C activity, all

delivered alongside continued investment in our market intelligence networks. Enhanced relationship building was a focus of high-level trade missions to China, the Philippines and Malaysia, and West Africa. Bord Bia's strong presence at global trade fairs continued with established and new events in the mix, while the global appeal of St. Patrick's Day was leveraged through promotional activities across 18 markets.

### **Develop best practice in Integrated Client Customer planning**

A strategic lead generation approach continues to be leveraged and for 2023 two clients, one each from UK and France were prioritised. Bord Bia facilitated a full day workshop with the global sustainability team of a major multinational company and their Irish suppliers, while a major foodservice seminar attracted over 300 attendees.

### **Develop best practice in integrated content management**

The My Bord Bia project soft launched in late August and progressively rolled out for all Bord Bia clients by year end. It provides a portal for Bord Bia clients to access supports and services, with content specifically tailored to their needs.

### **'We Must do 3': Nurture and Attract Industry Talents and Drive Client Capability**

#### **Deliver Capability Services built on the needs of industry**

Significant activities supporting commercial marketing strategy, category management, innovation capability, and digital enablement were all undertaken in 2023. Highlights included guidance on the new Great Britain export regime set to come into effect in 2024; a programme of upskilling on negotiation techniques particularly related to cost inflation; digital marketing training, including digital content audits; and new supports around product innovation. A Food Works Ireland showcase introduced 24 high-potential start-ups to industry.

### **Deliver a suite of Industry Talent Programmes**

Bord Bia's suite of post-graduate programmes continued to support the industry meet its future talent needs. The 12th Bord Bia Marketing Fellowship programme onboarded 20 new fellows, the Origin Green Ambassador Programme recruited nine new ambassadors and the International Graduate Programme welcomed 37 new participants. Bord Bia was proud to support a new AgDIF video launched on International Women's Day.

### **Establish a food sustainability executive education programme**

Two iterations of the Leaders Sustainability Acceleration programme, geared to C-suite level, took place during the year. Facilitating business ambitions around sustainability, these built on learnings from the first programme in 2022.

### **'We Must do 4': Champion Insight-Led Innovation and Brand Development**

#### **Shape the future innovation agenda**

Bord Bia's Thinking House continued to provide world-class leadership around innovation, addressing evolving market and consumer needs, with an intensifying focus on opportunities in sustainable nutrition. A busy year for the Brand Forum culminated in the annual dinner addressed by CEO of An Post, David McRedmond.

#### **Develop innovation partnerships**

Bord Bia's collaboration with Teagasc and Enterprise Ireland through the Food for Health Ireland (FHI) initiative continued in 2023. FHI is designed to give companies a competitive edge in the global food and ingredients market.

### **Complete insight-led innovation and brand development projects**

Companies availed of the Thinking House's bespoke consumer insight services and undertook projects in brand development, innovation and activation. The latest iteration of the Consumer Lifestyle Trends Programme, Bord Bia Cultivate! was positively received,

while the Brand Health Check provided an annual quantitative survey of grocery shoppers.

## **‘We Must do 5’: Support and enable the organisation and to execute strategy**

### **Attract and empower our people**

Bord Bia is proud to be a certified Great Place to Work organisation and recognises investment in people as critical to its future success. A new employer brand campaign was launched in June to get those thinking of moving roles to consider Bord Bia as a future employer.

### **Uphold the One Bord Bia operating model**

The One Bord Bia operating model is a programme of operational transformation bringing greater connectivity between our teams. Throughout 2023, it continued to underpin the successful delivery of Bord Bia strategy, including the organisation’s statutory, regulatory and corporate governance obligations. Town halls and the work of our Staff Consultative Committee played an important role in this journey.

### **Support with best-in-class IT infrastructure**

A leading-edge digital presence is pivotal to the operational success of Bord Bia. Digital training programmes form an important element of staff upskilling. In 2023, colleagues successfully completed modules on three focus areas: Navigating a Digital Organisation, The Power of Data and Innovation and Efficiency Methodologies.

## **Conclusion**

The success of our food, drink and horticulture industry is ultimately measured not only in trade figures but by the value it brings to both lives and livelihoods. Against persistently high inflation and escalating energy and business costs, there was much to be proud of in the 2023 performance. For primary food producers, however, it was undoubtedly a difficult year. Looking to 2024, there are reasons for optimism. The pressures around inflation,

energy costs and interest rates are set to ease too.

For Bord Bia, 2023 was a year of strong and sustained progress across our WMDs. Among the year’s highlights, the launch of AgNav and My Bord Bia, the achievement of PGI status for Irish grass-fed beef and the ongoing success of Bloom stand out. As CEO, I could not but be honoured to see Bord Bia top Ireland RepTrak Sustainability Index for 2023. I commend all my colleagues within Bord Bia for this impressive achievement. It is a worthy reflection of their untiring efforts on behalf of industry. The ongoing implementation of *Nurturing a Thriving Future* and the One Bord Bia operating model are evidence of a results-focused organisation driven by people of vision and talent. From the Global Hub in Dublin and across our growing network of overseas offices, Bord Bia will continue to deliver value to our clients. As we renew our efforts in 2024, we recognise each initiative and undertaking as an opportunity to go further on behalf of them.

Let me conclude by thanking the Chair of Bord Bia, Larry Murrin who we were delighted to welcome to the role in early 2024. I look forward to working closely with Larry in the coming years and recognise the wealth of experience, insight and good judgement he brings to the position. It will be invaluable as we progress and develop in the pivotal years ahead. Let me also warmly thank former Chair Dan MacSweeney for his service. Dan’s contribution over the last six years was outstanding and it was my honour to work with him throughout 2023. I greatly appreciated his support as I took on the role of CEO. On behalf of everyone at Bord Bia, I wish Dan every success in his future endeavours. I would also like to warmly thank the members of the Board and the five subsidiary Boards, and to recognise those who have also stepped down and who joined afresh this year. It is an ongoing pleasure to work with you and I value your contribution to all that we do.

I would also like to thank the Minister for Agriculture, Food and the Marine, Charlie McConalogue, T.D.; Martin Heydon, T.D., Minister of State with responsibility for Research and Development, Farm Safety, and New Market Development; and Senator Pippa Hackett, Minister of with responsibility for Land Use and Biodiversity. Their support for the work



that Bord Bia does has been wholehearted and of immense value to us. In that vein, I would like to thank all the team at DAFM and our peer organisations at home and abroad, in particular Teagasc, Enterprise Ireland and the Department of Foreign Affairs, with whom we have formed invaluable partnerships.

Leading Bord Bia and working behalf of the food, drink and horticulture industry in a time of immense transformation is an extraordinary privilege. I am proud to be part of an organisation that sees the path forward as one that has integrity, excellence and sustainability at its heart. Bord Bia was born of a changing Ireland and we have always believed that change and progress can go hand in hand. Our confidence in the future is built on the strengths we see within the food, drink and horticulture industry and the vision we share with it: that this vital industry has a key role to play in shaping a prosperous, sustainable future across our island and, in doing so, deliver excellence to many millions both at home and around the globe.

Jim O'Toole,

Chief Executive

# Sector Reviews

## Meat and Livestock

Irish meat and livestock exports were valued at €4.1 billion for 2023, which represented a 4% decline in comparison with the previous year. Notably, in 2022 the sector achieved significant growth of 17%, reaching a new record level for exports. Despite this reduction, primary meat and livestock collectively accounted for 26% of the value of Irish food, drink and horticulture exports in 2023: which was on-par with the previous year. This sector therefore remains the second largest category within Irish food, drink and horticulture exports, after dairy.

Last year, each of the main components within this sector recorded lower exports, as lower production of Irish beef, pigmeat and sheepmeat impacted on raw material availability. For both beef and pigmeat, the impact of lower export volumes was partly offset by higher average prices. However, in the case of sheepmeat, there was a reduction in average prices, mainly resulting from market pressure during the first half of the year. Meanwhile, growth in the value of livestock exports was mainly driven by robust intra-community trading of live cattle, especially calves.

Along with the above-mentioned sub-sectors, it is also worth highlighting that exports of value-added meat products, which are categorised within prepared consumer foods (PCF), grew slightly on the previous year to reach over €860 million.

### BEEF

The value of primary beef exports in 2023 was approximately €2.62 billion, which represented a decrease in value of nearly 2% on the previous year. The value of beef offal exports also remained very similar, rising by 1% to €136 million, resulting in a combined value of beef and offal exports of almost €2.76 billion.

The overall volume of beef exported in 2023 was down by more than 3%, to 484,000 tonnes. The impact of this reduction on the value of Irish beef exports was partially offset by a slight improvement in unit pricing. Cattle availability declined by more than 2% or 39,000 head, and furthermore average carcase weights were approximately 4kg lighter than the previous year. Livestock performance was impacted by poorer grass growth for much of the summer and lower purchases of concentrate feeds on many farms.

The UK was the strongest market for Irish beef in 2023, with primary exports growing by almost 7% in value and nearly 2% in volume terms in spite of lower production here as discussed above. Trade was helped by tight prime cattle supplies in Britain, alongside the broad acceptability of Irish beef among key retail and foodservice buyers.

Meanwhile, beef production across the European Union declined quite significantly, by more than 3% during 2023, with the most notable reduction in Italy, France and Spain. There were also fewer imports of beef into Europe from international suppliers. However, the lower availability didn't result in any significant uplift in the market, as European R3 young bull prices were just on-par with 2022, averaging €4.97 per kg for the year. By comparison, Irish R3 steer prices also averaged €4.97 per kg, which represented a 4% improvement year-on-year.

Across most EU markets, the inflationary impact on consumption moderated demand for beef, with consumers turning to lower cost proteins. Demand for manufacturing beef, which had underpinned high beef prices throughout the UK and Europe in 2022, eased in 2023, partially due to the fact that stocks had been rebuilt post Covid-19 but also as a result of weaker retail demand for burgers and grilling products due to poor weather during the summer season. The European Commission estimates that beef consumption across the EU recorded a 3.6% decline year-on-year in response to reduced domestic availability alongside a 3% decline in EU beef imports.

In late 2023, Irish Grass Fed Beef was granted

Protected Geographical Indication (PGI) status by the European Commission in recognition of its unique characteristics and geographical origin. This PGI will operate for all of Ireland on the basis that cattle across the 32 counties of Ireland graze in open fields for the majority of their lives. The granting of a PGI standard is directly linked to the Grass Fed Standard which was launched by Bord Bia and Teagasc in 2020 and provides independent verification and substantiation of this unique claim. From spring 2024, Bord Bia will embark on a marketing campaign to promote the PGI for Irish Grass Fed Beef across key European markets.

## Trends by Destination

In 2023, exports of Irish beef to the United Kingdom (UK) increased by 7% to reach €1.25 billion, accounting for 47.5% of Irish exports in value terms, up from 44% in 2022. Domestic beef production remained tight throughout the year resulting in a reduction of almost 2% in supplies. Partly as a result of the scarcity of British cattle, prices paid for R3 steers in the UK increased by an average of 7.5% in 2023, to the equivalent of €5.50 per kg.

The UK foodservice channel enjoyed continued growth with 6% higher beef volumes, according to AHDB. Burgers in dine-in and quick service restaurants were the principal driver of this strong performance. Retail sales were impacted by reduced consumer spending power and continued price increases, although the contraction in beef volumes was less pronounced than in many of the continental markets, at just 1%. The decline was most evident in the more expensive cuts such as steaks and roasts, which were four and six percent lower respectively, while sales of minced beef increased marginally.

Irish beef exports to continental European markets declined by 6.5% to almost €1.25 billion in 2023, accounting for 47.5% of the overall value of this trade. In spite of tighter European beef supplies, demand was described as relatively subdued across key markets. While forequarter cuts met a reasonable trade for most of the year, the cost-of-living crisis reportedly impacted on demand for higher value beef products including steaks

and roasting joints.

Bord Bia's Meat Shopper Insight Tracker monitors consumer's meat purchasing behaviour across seven of our main markets. The study found that in late 2023, 72% of consumers say they considered purchasing beef which represents an improvement relative to earlier in the year. However, an average of just 40% of these shopping occasions resulted in beef being purchased. While consumers aspire to buy more beef in the future, the primary reason provided for not making the actual purchase is that beef was considered 'too expensive' against other meal options.

Irish beef exports to international markets declined by 24% to €128 million, which represented just a 5% share of total Irish beef exports in value terms. This decline reflected relatively high prices in the UK and Europe, while prices on international markets moderated for the most part. For example, in late 2023, Australian producer prices were equivalent to just €2.58 per kg compared to €4.46 per kg a year earlier, which impacted on the competitive position of Irish beef, especially in Asian markets.

Irish beef exports to Japan and the Philippines were well behind 2022 levels. Meanwhile exports to China reached almost €20 million in value while the market was open between April and October 2023, prior to exports being suspended in November. Exports to Hong Kong developed positively, growing by 62% to reach almost €13 million.

## Prospects

The outlook for beef exports remains somewhat uncertain for 2024. Global and EU supplies look set to remain well balanced. However, the impact of cost-of-living factors and consumer sentiment on beef purchasing behaviour will remain a critical factor in determining price developments.

The EU beef herd is forecast by the EU Commission to decline by a further 1% in 2024, with reductions likely across several markets, including France, Spain, Italy and Germany. UK supplies are also expected to show a small decrease.

In global terms, beef supplies are forecast by the USDA to decrease marginally, largely driven by a decline in the US herd where the decline could be more than 10%. Lower production is also projected for Brazil, Argentina and Canada. Import demand globally, is projected to reduce marginally with growth coming mainly from the US, while Asian markets could be slightly weaker in terms of import demand, according to the USDA.

Some growth in EU imports is forecast by the EU Commission as foodservice demand normalises, and domestic European production continues to shrink.

Some relaxation in the cost-of-living crisis is expected in 2024 which could help demand for Irish beef as a consistent source of high-quality beef with strong sustainability credentials and consumer appeal.

Irish cattle availability is expected to face some further reduction in 2024, particularly in the second quarter. However, the tightening in prime cattle supplies may be partly offset by some additional cull cows, as was seen in 2023. Bord Bia's analysis of the DAFM Animal Identification and Movement database and related production and trade factors suggests an overall decrease of approximately 20-30,000 head (1 to 2%) in finished cattle supplies.

## LIVESTOCK

The live export trade continues to provide an important alternative outlet for Irish livestock with exports valued at €265 million during 2023. This represented an 13% increase on 2022. Cattle exports account for most of the live export trade, followed by pigs and sheep.

During 2023, Bord Bia actively supported the development of the live export trade through provision of up-to-date market information, promotional initiatives, including inward buyer visits, market study trips and lead generation activities, to enhance the image and reputation of Irish animals.

### Cattle

Over 332,000 head of live cattle were exported during 2023 with an export value of €190

million. This represented a 14% increase in numbers compared to year earlier levels, a trend that was mainly driven by growth in the intracommunity trading of calves.

Tighter cattle supplies in mainland Europe, combined with the positive reputation of Irish livestock with existing customers, contributed to a 20% increase in the number of Irish calves traded externally in 2023. The Netherlands was the strongest market for dairy male calves in 2023 with 110,000 head traded to the region. Meanwhile Spain has also remained an important market for both dairy and beef sired calves, accounting for 60,000 head. Eastern Europe was a growing market in 2023 for older, stronger calves destined for beef production.

Tighter cattle supplies in key markets contributed to higher demand for Irish weanling and store cattle in mainland Europe, with some increase in activity in international markets in the second half of 2023 also contributing to a positive export performance for the category.

Trade with Northern Ireland for both finished cattle and those for further production also recorded an improvement in the second half of 2023. Tighter cattle supplies in the UK, a favourable exchange rate, and a growing price differential between Irish and UK deadweight cattle prices all provided some increased positivity in this trade.

### Other livestock

There were 365,000 pigs exported during 2023, primarily to Northern Ireland. This is back almost 10% from the 400,000 pigs exported the previous year and is reflective of notable declines in the Irish pig herd and lower availability of pigs for export. An improvement in deadweight pork prices has meant the export value of pigs held steady at €75 million, despite the lower levels of export. Live sheep exports totalled 20,000 head in 2023 and accounted for approximately three million euro in export revenue.

### Prospects for 2024

The live trading of animals remains under intense scrutiny at both a local and European level. The longer-term future of the unweaned

calf trade will be impacted by the proposed changes to EU Transport legislation. However, despite this the short-term outlook for calf exports in 2024 remains fairly positive with firm forward demand from customers in key markets including the Netherlands, Spain and Italy.

The outlook for older categories of cattle also remains positive in the short term with tighter domestic cattle supplies expected in many European markets including Spain, Italy, Greece and Eastern Europe. Supply outlooks also remain subdued in Northern Ireland which is expected to drive stable demand for Irish cattle during 2024.

## SHEEPMEAT

Irish sheepmeat exports were valued at over €433 million during 2023, an 8% decline on the previous year's levels. This follows year-on-year growth since 2014. The volume of sheepmeat exports also declined by 3% during 2023 to 74,000 tonnes, largely as a result of lighter carcass weights. This factor contributed to the decline in value sales alongside a more challenging trading environment for Irish sheepmeat.

Shifts in global demand, increased production in the southern hemisphere and a notable increase in the availability of UK sheepmeat in our key export markets all combined to create challenges for Irish exporters. A larger carryover of hoggets into 2023 boosted Irish sheepmeat production in the first half of the year, with the increased supplies putting some downward pressure on the deadweight trade. As we moved into the second half of 2023, lamb supplies for processing tightened significantly and helped keep a floor under the lamb trade with prices operating in line with the corresponding period in 2022.

The tighter supplies of lambs for processing in the second half of the year, combined with lower carcass weights, more than offset the higher production in the first half of the year. Higher input costs and difficult production conditions affected the quality of lambs presented for processing in 2023, which contributed to the reduction in the value of sheepmeat exports.

## Trends by Destination

The EU market remained the primary outlet for Irish sheepmeat, accounting for almost three quarters of sheepmeat exports in both value and volume terms. Exports to the region were valued at €316 million, a 10% decline from year earlier levels.

France remained the largest market with exports valued at €134 million, back 9% on 2022 levels. There were also declines in the value of exports to Germany, Sweden, Belgium and Italy. The higher price point of lamb relative to other proteins left it more exposed to the impacts of high levels of inflation in many of our key export markets.

On a more positive note, key lamb export markets indicated some signs of stabilisation in lamb consumption during the latter part of 2023. Lamb benefits from the important religious and cultural role it holds with European consumers which helps to provide some stability in overall consumption. The latest EU short term outlook indicates stable per capita consumption – up 0.8% - within the trading bloc.

Sheepmeat exports to the UK were valued at €72 million, a 3% decline from year earlier levels. Export market share in value terms increased slightly to 17%.

Exports of sheepmeat to international markets were valued at €45 million, back 6% on 2022 levels. Exports to Switzerland were valued at €30 million representing a decline of 6%, but still accounted for two thirds of all Irish sheepmeat traded internationally. There was strong growth in the value of exports to Asian markets, which were collectively valued at €7 million, of which Hong Kong accounted for almost €5 million. Meanwhile, exports to Canada were more subdued in 2023, at €5 million back from €11 million the previous year.

## Prospects

The outlook for the Irish sheepmeat sector remains challenging with the impact of inflation in key export markets affecting lamb demand. Profitability issues and challenging production conditions on Irish farms in 2023 have impacted on producer confidence, with a further decrease

in ewe numbers expected in 2024. A higher carryover of 2023-born sheep into 2024 for processing is expected to keep export volumes stable in the first half of the year. However, initial forecasts indicate tighter supplies from Q3 2024 onwards.

On a global level, China continues to have a strong impact on the sheepmeat market due to the sheer volume of product it imports. Volumes of sheepmeat imports into China improved in the second half of 2023 and this is expected to continue into 2024. However, it is worth noting that the returns available are much more competitive which impacts on the value of the trade. The US also remains a significant importer of sheepmeat, albeit at lower volumes and values than previous years.

Sheepmeat production in Australia is expected to remain strong in 2024 with New Zealand output also holding steady. With weaker returns from the Chinese and US markets however, there is potential for more southern hemisphere product to be exported to higher value markets such as the EU and the UK, which could continue to impact the competitiveness of Irish lamb in these markets during 2024.

## PIGMEAT

During 2023, the value of Irish primary pigmeat exports declined by 15% to €461 million, despite higher unit pricing partly offsetting the dramatic reduction in export volumes that arose over the course of the year.

Changes in international market demand combined with higher costs of production over the last number of years has challenged the EU pigmeat supply chain. Across Europe, producers responded to low or negative farm profitability, rising animal welfare issues and environmental concerns by reducing their holding size in key regions. Irish pig producers reacted similarly to their European counterparts by reducing their average holding size during 2023. This significantly impacted on the sector's output levels, with the volume of Irish pigmeat exports (excluding value-added pigmeat) 21% lower than 2022 levels at 188,000 tonnes.

Despite EU pig prices breaking record levels

during 2023, pig producers across the EU continued to exit the industry. The June 2023 Livestock Census showed a decline of 2% or 233,000 head compared to prior year levels. Significant pig producing member states such as Germany, France, the Netherlands, Poland and Denmark recorded lower numbers. This reflects producers taking a more cautious attitude to expanding production, especially against a backdrop of legacy debt from the cost of production crisis.

In Northern Europe, higher animal welfare and environmental standards reportedly forced some producers to exit the industry. However, some increase in the Spanish and Italian pig breeding herd helped to partially offset the decline in European numbers. Following on from the record EU pig producer prices that were set during the second half of 2022 in response to tighter supplies, 2023 saw continued strong prices, with Irish prices hitting record highs of €2.24 per kg deadweight excluding VAT at the end of August, although this was followed by some decline in pig pricing towards the year end.

## Trends by destination

Each year, the majority of Ireland's primary pigmeat exports usually tend to be destined for international markets. However, shipments of Irish pigmeat to international markets outside of the EU and UK fell significantly during 2023 with these markets accounting for just 51% of exports compared to 64% during 2022.

This trend reflected weak demand across the Asian region, with exports to China, Japan, the Philippines, and South Korea impacted by weak import demand levels as EU pigmeat suppliers were less competitive relative to the US and Brazil. In addition, due to the pattern of lower Northern American prices throughout the year, shipments of pigmeat to this region were back by 48% to €19 million.

Compensating for lower international demand, exports to the UK increased by 44% to approximately €135 million reflecting extremely tight UK supplies. Irish pigmeat shipments to EU markets were 8% lower at €93 million.

## Prospects

Global pigmeat production is forecast to remain unchanged in 2024, with lower output in China anticipated to offset increases in Brazil, Vietnam and the United States. Chinese production levels are forecast to fall by 1% for the year to 56 million tonnes. Whilst the USDA is reporting higher American production, some industry analysts believe that a significant production correction is facing their industry on the back of prolonged losses.

The EU pig industry continues to readjust from weak domestic consumption, and a lack of new markets to replace China by aligning production with lower demand levels. EU pigmeat production is expected to recover marginally as the year continues. However, estimates suggest that production is likely to remain around 10% lower than 2021, reflecting the structural changes that are putting significant downward pressure on production.

Irish pigmeat production is expected to gradually recover from the first quarter of 2024, reflecting some recovery in the pig breeding herd on the back of higher prices and some downward readjustment in production costs.

## POULTRY

Irish poultry exports decreased by 5% in value terms to €153 million during 2023.

The global poultry industry consolidated during 2023 despite weak global economic growth and higher consumer prices. The decline in feed prices helped boost output as the year progressed while global demand improved as consumer pricing began to taper off.

The Irish poultry industry benefitted from firm demand, combined with lower disease pressure in the sector. Output levels of the main poultry subcategory, chicken, increased by 3%. This reflected firm demand, with more dark chicken being sold on the Irish market as price sensitive consumers continue to seek value.

According to Kantar Worldpanel, Irish consumer spending on dark chicken meat rose by 36% to €45 million during 2023. Whilst poultry meat is the most competitively

positioned meat protein, there has been significant price inflation in this category. According to Kantar data, Irish poultry retail prices increased by almost 12% for the year.

High Pathogenic Avian Influenza (HPAI) affected the duck industry during 2022, however a strong recovery was evident in 2023.

In Europe, production growth across the region continues to be impacted by HPAI, especially in France and central Europe, and the increased prevalence towards slow-growing chicken, particularly in the Netherlands. Despite strong seasonal demand for chicken, there has been disciplined industry growth as producers remain cautious against the threat of HPAI and geopolitical tensions that could cause another spike in production costs.

## Trends by destination

Increased poultry shipments to the EU helped to offset lower exports to the UK region. Key markets within Europe include the Netherlands, France, Denmark and Germany.

The Spanish market continues to show strong growth reflecting the penetration of the retail channel for dark poultry meat products, with exports almost doubling to more than €6 million euros during the year. Elsewhere, poultry shipments to international markets were 12% lower at over €28 million.

Market access conditions to South Africa improved during the year, and exports also increased to other African markets such as Guinea, Ghana, and Benin.

## Prospects

The outlook for the global poultry industry is expected to be helped by improving demand and lower costs in 2024. Europe's market conditions remain positive, but the industry faces pressure from rising imports, especially increased chicken imports from the Ukraine which rose significantly in 2023.

European consumer spending is expected to come under further pressure. This squeeze on spending is likely to cause further switching into the chicken category, with pork pricing

expected to remain at elevated levels.

H5N1 remains a concern for the global poultry industry, and with the virus has spreading to most regions, increased global risk for production and trade will be evident. If commercial flocks in any of the three key Brazilian producing regions become impacted, then the effect on global markets could be significant for the animal protein sector.



# DAIRY PRODUCTS AND INGREDIENTS

## Irish Dairy Export Performance

Irish dairy exports were valued at an estimated €6.34 billion in 2023, representing a value decline of almost seven percent. 1.64m tonnes of products and ingredients were shipped to over 130 markets worldwide.

In 2023, Domestic Milk Intake was estimated at almost 8.5 billion litres, a decline of 365.5 million litres (-4.1%) when compared with 2022.

Global milk supply grew by one percent in 2023 with Europe, New Zealand and the US all increasing output, with Argentina the only major exporter showing lower production. China continues to grow its milk pool, registering growth of around two percent, albeit slowing versus the higher growth rates of over eight percent in both 2021 and 2022 (StoneX, 2023).

Within Europe, deficits in France (down almost three percent), Ireland, and Italy (down two percent) were countered by modest growth (up one to two percent) across Denmark, Germany, Netherlands and Poland (GIRA, 2023a).

It is estimated that imported traded global volumes declined by less than one percent in 2023 (StoneX, 2023).

The world's largest dairy importer, China, saw its overall demand for 2023 fall slightly behind 2022 levels at just under 16.5 million tonnes liquid milk equivalent. Indonesia, Japan, Thailand and South Korea all reduced their imports by between five percent and 15% in 2023 whereas import demand increased for Mexico, Algeria and the United States (StoneX, 2023).

Irish butter exports decreased by around €175 million in 2023 to reach an estimated €1.3 billion, down 12% on 2022 levels. The EU Milk

Market Observatory reported a range of €4,380 - €5,740 per tonne for 2023, significantly behind 2022 prices (EU Commission, 2023b).

Cheese exports increased by around €55 million in 2023 to approximately €1.3 billion, a rise of four percent up on 2022's figures. Market values were relatively robust with average weekly European prices of approximately €3,900 per tonne during the year, only eight percent behind the 2022 prices and well ahead of the five-year average of €3,330.

Given the global pricing challenge all priority regions declined in value terms with the exception of the Middle East where affordability saw increased trade,.

## Key Activities and Achievements in 2023

EU Co-funded Dairy Campaign: 2023 marked the second year of a three year €3.2m campaign, 80% of which is funded by Europe, to promote Irish and European dairy in Japan, Malaysia, Vietnam, Thailand and the Philippines.

Throughout 2023, Bord Bia, alongside the Irish dairy industry, undertook a series of activities including inward buyer visits, in-market technical seminars and trade shows to increase awareness of European dairy in Asia. So far, the campaign has engaged with over 400 buyers in Japan, Vietnam and Thailand via three technical seminars and trade shows. In July, Bord Bia hosted the single largest delegation of dairy buyers to Ireland on an inward buyer visit. The week-long itinerary included visits to dairy processors, a Sustainable Dairy Assurance Scheme approved dairy farm and Teagasc Moorepark. In November, two buyer seminars in Philippines and Malaysia were attended by the Minister of Agriculture as part of a trade mission to South East Asia.

B2B Marketing Campaigns – priority markets: In 2023, Bord Bia ran a programme of marketing campaigns in EU, UK, Asia and US markets with the objective of driving awareness of Irish grass fed dairy and to drive preference for sourcing from Ireland among selected trade

buyers. Activations included trade advertorials, inward journalist visits and online advertising. Alongside the well-established position on sustainability through Origin Green, these campaigns also featured the availability of grass fed certification on Irish dairy products. Significant coverage was gained in the United States, United Kingdom, Germany and the United Arab Emirates.

**World Milk Day Campaign – B2B Activation:** On June 1st, Bord Bia launched the World Milk Day campaign to drive awareness of grass fed dairy from Ireland among trade customers in international markets. The campaign was launched on LinkedIn and targeted trade customers in the UK, USA, Germany, France, Spain, South East Asia, China, Africa and the United Arab Emirates with video content highlighting the grass fed credentials of Irish dairy.

**Irish Farmhouse Cheese B2C Campaigns:** Bord Bia's dairy team organised two farmhouse cheese awareness campaigns aimed at showcasing the range of cheese available and directing traffic back to the newly developed farmhouse cheese webpage on the Bord Bia website. The campaigns involved a mix of sponsored posts and influencer activity which resulted in more than 2 million impressions.

Work on road-mapping category development opportunities for the farmhouse cheese and consumer yoghurt categories commenced in December 2023 with expected output in early 2024.

**Bord Bia Dairy Markets Seminar:** The Bord Bia Dairy Markets Seminar took place in the Kiltash Hotel on 18 April 2023 with over 150 registered attendees on the day from across the Irish dairy industry. The objective of the event was to deliver better understanding of the changing global market environment. The seminar included keynote speeches from Minister of State for Agriculture, Food and the Marine, Martin Heydon T.D., and Bord Bia CEO, Jim O'Toole, followed by a Bord Bia Global Business Development panel, a debrief on Future of Dairy, insights on global trade

markets and a Sustainable Consumer Dairy panel.

**Trade Shows:** Trade shows continued to play a key role in enabling Irish dairy clients to connect with their customers. In 2023, Bord Bia, together with the Irish Dairy Industry, attended Gulfood, Foodex, Salon du Fromage, Biofach, Anuga, Food Ingredients Asia and Food Ingredients Europe.

Insight projects in the year included the continuation of 'Market Pulse' services in Nigeria, Senegal and Ivory Coast, delivering insight on frontline market conditions in key dairy markets. A project was delivered focussed on opportunities for value-add ingredients to serve the growing domestic specialized nutrition sector in China and a '*Future of Dairy UK*,' study was delivered in time to become a key discussion point at the Ireland UK Dairy Roundtable Bord Bia hosted in the Irish Embassy in London in December that was attended by senior UK based customers.

# PREPARED CONSUMER FOODS, BEVERAGES AND SEAFOOD

## PREPARED CONSUMER FOODS

The Prepared Consumer Foods (PCF) sector continued to show its resilience in 2023 with the value of exports up 7% to reach €3.1 billion. Value increases were seen across the core categories, most notably meal solutions at €600 million up 11%; bakery at €315 million up 10%; drinks (carbonated and juice) at €285 million up 10% and confectionery (chocolate and sugar) at €430 million up 12%. In a clear nod to market conditions and the cost-of-living crisis experienced in priority markets, especially the UK, volume growth was muted.

The year started with a level of market optimism on the back of 2022 where there was buoyant demand from the UK and Europe. However, inflation dominated the trading environment at both consumer and customer level. In March 2023, the UK saw an all-time peak of grocery inflation of 17.5% (Kantar UK, 2023a), before slowing to single digits for the first time in 16 months by year end (Kantar UK, 2023b). As the year progressed this made for a tough trading environment as Irish suppliers found themselves under increased pressure for price renegotiations while from a manufacturing perspective, there was a little experience of deflation with energy and labour driving manufacturing costs.

Consumers used a range of tactics to manage their budgets including trading down, switching to frozen, purchasing on promotion and engaging in loyalty schemes. Source: Bord Bia and CSO Main categories of Irish PCF exports

Main categories of Irish PCF exports Value Added Meat Meal Solutions Confectionery

(Chocolate and Sugar) Bakery (Biscuits Bakery and Sweet Bakery)

Foodservice faced many of the same issues as the retail channel such as lower skills, labour shortages, higher wages, and unprecedented inflation and uncertainty. Foodservice consumers continued to eat out but traded down and found other ways to manage their spend such as reduced order sizes. The landscape was especially competitive as operators competed with each other and with retailers to capture market share via portion sizes, discounts, technology, delivery and superior customer experience. Therefore, while Irish exporters held value as best as possible, volumes came under pressure.

The 2023 performance was ultimately defined by constrained consumer spending and a competitive environment putting pressure on companies to manage margin and volume. Those companies that aligned and partnered with customers to respond to the market have seen, and will continue to see, growth pathways.

## Trends by key categories

### Value Added Meats

Value-added meat exports were estimated at €880 million in 2023, an increase of 3%. The subcategory is split 48%, 29% and 23% respectively for pigmeat, beef and poultry. Value-added pigmeat Total value-added pigmeat exports increased by approximately 2% to €420 million.

The UK continues to be the key destination, accounting for 70% of total exports, despite the slowdown in shipments to this market. This market is particularly important for cooked bacon, toppings and ingredients, which service the quick service and the manufacturing channels. The UK market remained challenging due to the ongoing cost-of-living crisis and inflationary impact. As a result, discretionary spending is challenged, as consumers continue to trade down.

European markets showed a strong performance, with the value of these exports

rising by 26% to almost €100 million, and now accounting for almost 23% of exports. France, Germany, Spain and Denmark remain critical markets for this sector; however, good growth is coming from other markets, such as Italy, Belgium, and Portugal, with value-added pigmeat significantly contributing to this.

This demonstrates the continued diversification efforts by the sector through increased sales of cooked ribs in the retail channel, cooked pigmeat toppings for pizza and sandwich categories across the fast casual and quick service channel. Although small, international markets are still a focus for continued growth plans for the sector, with demand for value added pigmeat ingredients especially strong in key target international markets.

Value added beef exports reached €255 million in 2023, an increase of 7%. This subcategory is an opportunity to meet the growing consumer demand for meal solutions and increase the value from traditionally lower priced cuts and trimmings. It consists of products such as value-added ingredients for foodservice and manufacturing channels and products such as burgers for retail and foodservice. Demand from the sector was strong at the beginning of the year however, poor summer weather across Britain and Europe resulted in subdued demand for grilling products and as a result there has been some build-up in stock levels and less sell through in the latter part of the year.

Key markets for exports during 2023 included the UK, with sales up 1% to €125 million. Sales to the EU-27 in total increased by 13% to €130 million, with France and Germany, two of the main markets, both increasing by 2% to over €30 million and €10 million respectively. Value-added poultry Shipments of value-added poultry increased by 1% to €200 million during the year, with approximately 85% of these exports destined for the UK market. This will leave value added poultry to the UK 2% lower at €170 million. This market is particularly important for cooked chicken suppliers who provide value-added chicken ingredients that are used in the further manufacturing channel and the limited-service restaurant channel. This performance also reflected inflationary challenges in this market.

Exports to the EU increased by 23% to €30 million, with strong performances recorded in the Netherlands, Germany and France.

### **Bakery (biscuits, bread, sweet bakery)**

At a macro level, bakery had a strong 2023 in terms of export growth, with much of the opportunity coming from the UK market, which continues to account for over 90% of Irish bakery exports across bread, sweet bakery and baked goods. Values were up by an estimated 10% to €315 million, while volumes saw a mid-single digit rise. This was driven by a combination of new business and range extensions with existing customers. However, margin pressures endured throughout the year with uncertainty around flour prices, and increases in sugar, slowing the appetite for new business.

Shifting focus from UK bakeries has opened new business for Irish exporters in the market who now benefit from a network of full penetration across the retail channel, as well as a growing portfolio of top-tier foodservice and manufacturing customers. Consumer-led innovation across product, format and degree of finish have further secured the position of leading Irish bakeries in the UK market. While exports to regions outside of the UK are all in single digit percentages, growth is strong and reflective of the rising demand for seasonal premium offerings, and free-from alternatives. Elasticity of demand varies significantly across the sector and polarisation has started to emerge with ranges in the middle ground being squeezed by a combination of those seeking to trade up for more premium, restaurant quality offerings and trading down to save money.

### **Meal Solutions**

Meal solutions, now worth 19% of total PCF exports, saw an increase of 11% to reach an estimated €600 million, primarily driven by higher prices. The UK market, particularly the retail frozen channel, is the most significant destination for meal solutions, accounting for almost 70% of exports. The frozen channel in the UK, albeit in slight volume decline, performed strongly versus other categories and continues to appeal to consumers seeking

affordable, long-lasting items. Covid-19 and the cost-of-living crisis have driven frozen penetration, and it remains to be seen if this impact influences long-term behaviour. Trading down was evident, with a strong performance from private label. Irish exporters are well established in the UK market, particularly in frozen prepared foods.

In 2023, the sector demonstrated its resilience again as it continued to deliver compelling category propositions and impactful promotional activity. Operational excellence has long been a trait of this sector, and it remains even more important given the cost-based challenges that currently exist. European markets account for 23% of meal solution exports, with a strong performance in 2023 with Germany, Belgium and Spain driving growth. This performance reflects the strength of this sector, the product appeal across markets, and their ability to tap into international networks.

### **Chocolate and Sweet Confectionery**

Combined chocolate and sugar confectionery was valued at €430 million and represents 14% of total PCF exports. The performance of the category was mixed in 2023. Sugar confectionery reached €135 million, an increase of 16% on 2022, while also showing strong volume increases. This is a robust performance for the sector considering the price inflation on key ingredients. It reflects solid innovations made by the sector that have carved out enduring differentiation, and strong better-for-you claims in a category that is coming under increasing regulatory pressures.

The performance of chocolate confectionery was more muted with value up 10% to reach €295 million, while volume was static. The soft launch of High Fat Salt or Sugar (HFSS) regulations amongst key customers in the UK market, has reduced visibility of chocolate at key selling points on the calendar. However, exporters continued to find new business and growth in more premium and speciality channels.

### **Carbonated drinks and juices**

Given the rise in cost of key inputs such as fruit, sugar, and packaging formats, especially glass,

the beverage sector has shown particular resilience. Export values were up by an estimated 10% to €285 million, while also showing some volume growth. The beverage portfolio represents one of the more diversified of the PCF categories, with 48% of exports going to non-UK destinations. Competitive offerings for the retail channel as well as steady growth for Ready to Drink (RTD) have seen growth in the continental markets.

### **Performance by destination**

The UK continued to be the most important market accounting for 64% of exports. Exports to Northern Ireland and Great Britain were valued at €523 million and €1.5 billion respectively to total €2 billion for the UK market, representing a value increase of 1%. The UK market, particularly in the second half of the year, started to show the effect of the cost-of-living crisis on shopper behaviour. Discounters benefited from the inflationary context, as their market share increased to 18% (Kantar UK, 2023b). Private label enjoyed a strong year, however with slowing inflation, brands showed the first signs of closing the gap in the latter part of 2023.

The EU accounted for 27% of exports and was valued at €843 million, an increase of 21%. The Netherlands was the largest market valued at €145 million representing a decline of 13% on 2022. Categories such as chocolate confectionery, meal solutions, juices and bread that had all gained ground in the previous two years, saw value declines in 2023. Volumes appear stable, which highlights the pressure on prices during the year.

Germany was the second largest EU export market for PCF, with exports valued at €138 million an increase of 23%. There was low single digit volume growth despite the level of inflation experienced in Germany. Meal solutions, juices, sweet bakery and sugar confectionery all saw value growth. France and Spain were the next two largest market valued at €119 million and €74 million respectively. The United States was the largest market outside of Europe, accounting for 4% of exports. The market was valued at €117 million, an increase of 23%. This performance reflects the dedication of Irish exporters to this market

over a long period of time combined with a buoyant economy not seen in the UK and EU markets.

## BEVERAGES

Total drink exports for 2023 were estimated to be approximately €1.8 billion. This represents a Compound Annual Growth Rate (CAGR) of 3.4% from 2021 levels despite a difficult year in 2023 (down 8%), emphasising the strength of the post Covid-19 recovery in Irish drink exports. Irish whiskey exports were back by 14%, at €875 million, and Irish cream liqueurs were back by 9% at €370 million. However, Irish whiskey exports are still in positive CAGR growth since 2021, up 1.5%. Additionally, beer exports grew strongly by 11% to reach €330 million.

One of the key factors for Irish drink exports in 2023 was a decline in value of exports to the key market of North America. Total drink exports to North America were down by approximately 26% overall. The fall in exports of both Irish whiskey and Irish cream liqueur in particular to North America are due to a number of factors which culminated in 2023. There was a build-up of stock in the market in 2022 to mitigate supply and trading challenges through the Covid-19 period, as the market started to open up. There was also a deceleration in depletion rate in the first half of 2023, as consumers felt the squeeze of higher inflation and increased interest rates. The final factor affecting exports was the cost of credit. With interest rates in the US at 5.5%, importers and distributors were reluctant to hold stock at previous levels.

Despite these setbacks, a record 15 million nine-litre cases of Irish whiskey were sold globally in 2022 and this figure has remained steady in 2023. Exports to the EU increased by 11% overall to €490 million, and the UK has seen strong growth with exports up by 19% to €335 million. Key emerging markets also continue to perform well for Irish drink exports including Nigeria (+6%), Czech Republic (+14%) and Poland (+3%) which highlights the growing global footprint of Irish drinks.

### Irish whiskey

Irish whiskey exports in 2023 totalled €875 million (down 14%) and remains the key drink export category representing 50% of total value. Exports were disproportionately affected by a decline in shipments to the US. However, this was offset by strong growth in other key export regions such as the EU, which increased by 17% to €285 million, and exports to the UK were 38% higher at approximately €65 million. Emerging global markets such as Nigeria up 59%, Poland up 21%, Singapore up 55% and South Korea up 11% continue to grow for Irish whiskey.

Approximately 91% of Irish whiskey retail sales in the US sit within the premium and above price bands and the category has benefitted in recent years from global premiumisation. The latest analysis from IWSR, suggests that premiumisation and drinking 'less but better' is continuing as a trend globally which is benefitting Irish whiskey producers. However, some slowdown in this trend is likely, partly due to a squeeze on incomes from on-going inflation and higher interest rates in key export markets.

### Irish cream liqueur

Irish cream liqueur exports fell by 9% to €370 million. The fall in exports was primarily due to a decline in export values to North America and the EU. Similar to Irish whiskey exports, there was a surge in Irish cream liqueur exports towards the end of 2022 which led to high volumes of stock in the market. This mostly affected products within the standard price band, which are traditionally ordered in bulk more regularly than premium lines of Irish cream liqueur. This is reflected in the decline of 26% in the volume of Irish cream liqueur exports.

Key export markets for the category in 2023 were the US which totalled €155 million, Canada at €40 million, and Germany which totalled €20 million. Export values to the US were down by almost 4% with sales to Canada and Germany declining by 28% and 7% respectively. There was growth in some emerging markets across Europe including Czech Republic, which more than doubled. Exports to the UK, a traditionally strong market

for Irish cream liqueur, also eased by 20% in 2023.

### Other drink categories

Irish beer exports increased by 11% to reach an estimated €330 million. This builds on the recovery in beer exports in 2022 with exports now exceeding 2019 levels by 8%, emphasising the resilience of the Irish beer sector. Exports to the UK were well ahead of 2022, rising by 26% to almost €160 million. Key EU markets performed very strongly with exports to France increasing to €40 million up 59%; Germany to €15 million up 14%, Belgium to €15 million up 15%, and Italy to €10 million up 25%. Exports to the North American market were back by 11% totalling €65 million on the back of strong growth in 2022.

Irish cider exports recorded another strong year in 2023 increasing by 11% to reach €80 million. The UK is the key export market for the category, accounting for 90% of overall exports.

Irish gin experienced a slowdown in exports following five consecutive years of strong growth as Ireland established itself as a global producer in the category. Overall, Irish gin exports totalled €20 million in 2023 representing a decline of 20%. The category faced the same issues as other spirits, particularly in the key US market. One key growth market for gin in 2023 was the UK which increased by 82% to approach three million euros. There was also strong growth recorded in France, Germany, Italy and Turkey.

Bord Bia's key initiative for the sector was the "Spirit of Ireland" campaign. This programme is an educational event aimed at the front-line staff, buyers and owners of on and off trade establishments in key target markets. The initiative was launched by the Minister of Agriculture, Food and the Marine, Charlie McConalogue, at the Liquor Control Board of Ohio in April 2022. Since its launch Bord Bia has delivered 30 of these events over the course of 2022 and 2023 to other control states in the US, Canada and at other on and off-trade events in France, India, Germany, Nigeria and the UK. Bord Bia exhibited at 3 drinks trade shows with a total of 40 clients participating.

Bord Bia also developed Market Entry guides for Canada, Mexico and Japan which will be debriefed in early 2024. Bord Bia also released an Economic Analysis of the domestic craft beer and cider industry as well as supporting clients with co-funded tastings in the United States.

### SEAFOOD

The Irish seafood sector experienced challenging export markets during 2023. In overall terms there was a 14% decline in values against a backdrop of falling volumes (-25%) particularly within the pelagic and salmon categories. Exports of pelagic seafood declined by 29% in value due to a number of factors including quota cuts to mackerel as a result of the TCA; a declining horse mackerel quota and a reduction in foreign landings especially from UK vessels who are now required to land 50% of their catch into UK ports. Salmon exports also declined by almost 6% in value in 2023 with volume declines (-22%) running significantly ahead of value declines, reflecting the strength of demand still for Irish organic salmon in the market. Output was adversely impacted by biological issues during 2022 which reduced volumes available in 2023. Demand and prices remained firm nonetheless.

Shellfish exports reduced in value by 8.6% reflecting the weakening in unit prices especially for higher value species due to the ongoing cost-of-living crisis across key export markets. Demand for higher value species such as langoustines, oysters and crab were all impacted during the year. Demand for Irish whitefish increased slightly with value increasing by 3% in 2023 and demonstrated some modest growth although prices softened in comparison to the previous year with volumes running ahead of value across all key markets (+32%).

Exports of value-added seafood products were lower during 2023 (-9%) but are still roughly 20% ahead of 2021 levels and at around €110mn they represent a strong and growing segment within the total seafood market. We see this year's decline as a pause in the trend of recent years where there has been strong

growth in value-added products, such as consumer ready, cooked, ready to cook/ready to eat or smoked seafood products.

## Destinations

Nigeria continues to be the dominant export market for Irish pelagics and accounted for more than a third of total Irish pelagic exports in 2023. Japan is also an important destination for Irish mackerel and is now the second largest destination for Irish pelagic exports followed by France. Significant declines in pelagic exports were recorded to other markets in Africa such as Ghana (-25% in value) and Egypt (-82% in value) whilst the Chinese market was difficult (-64%) due to the general economic slowdown and cost-of-living pressures. The demand for Irish frozen blue whiting in China has also reduced in recent years.

The EU27 markets continue to dominate exports of Irish organic salmon (accounting for 72% of export value and volume) and dominated by France, Poland and Germany. Great Britain and Northern Ireland are other important destinations for Irish organic salmon. Lower volumes led to reduced exports across these markets except for Northern Ireland and Poland during 2023 despite unit prices increasing, reflecting the continued strength of demand for Irish organic salmon in these markets.

Our core shellfish markets remain within the EU with Italy, France and Spain between them accounting for more than 65% of total export values. These markets experienced a challenging 2023 with sluggish demand, leading to double digit reductions in export values. On a positive note, there was a recovery in exports to Asian markets (+31% in value) with wider China, Vietnam, S. Korea and Japan all recording strong export performances during the year. In some export markets, the cost of shellfish versus other proteins is limiting further value growth and we see this continuing into 2024.

Demand for Irish whitefish was stable in 2023, increasing by 3% in value terms. Spain, France, Northern Ireland and Belgium are the main export destinations and all recorded positive

value and volume growth. Exports to Great Britain declined significantly during this period but this may be because of exports going to Northern Ireland instead and then being re-exported to Britain.

The core region for value added seafood exports is the EU 27 which accounts for almost 70% of added value exports. The UK market accounts for an estimated 16% of exports in this category and showed really strong value and volume growth during 2023. Exports of value added exports to Asia fell during the year.

## Seafood Prospects

2024 looks set to be another challenging year for the sector. There will be further cuts to the mackerel quota and the pelagic sector will continue to remain dependent on foreign landings to boost supply. However, recent investments in value-added pelagic capability including IQF boneless mackerel fillets and portions is welcome news and should help to drive the value of exports in 2024.

Prospects for Irish organic salmon are more positive as output is forecast to increase in 2024 but the challenge from new entrants into this market remain and the industry will need to continue to promote the benefits of Irish organic salmon to its trade and consumer base in the face of growing competition from other countries including Norway and Scotland.

It is anticipated that the shellfish sector may not replicate the increases in value of recent years due to a squeeze on consumer spending and the availability of cheaper proteins and lower priced competition in some of our key export markets. The resumption of live crab exports to China is a welcome development nonetheless and the development of new markets for Irish shellfish including Vietnam for example will continue to be developed by Bord Bia to help build awareness and grow sales across the emerging markets.

The whitefish sector is expected to be reasonably stable in the coming year and recent investments by this sector into more value-added, ready to eat/ready to cook



formats should help to grow export values and open new markets and channels in 2024.

### **Cross sectoral engagement**

#### **Bord Bia's Learning Zone**

Bord Bia's Learning Zone was launched in 2020 with a wide range of modules available for client companies to sign up to. There are 28 modules currently available. In 2023, additional digital and marketing modules were rolled out. The Learning Zone has been developed in response to feedback from Bord Bia's small business clients who would like to be able to learn in their own time. Additional resources in the form of videos, infographics and downloadable toolkits make this a versatile learning resource for small business clients.

#### **My Bord Bia client portal**

The My Bord Bia client portal went live to Bord Bia clients in 2023. To date over 320 client companies have signed up to access the portal dedicated to providing an overview of all Bord Bia's supports and services. To date clients can access all of Bord Bia's content, the Bord Bia Learning Zone, apply for a MAP grant and reach out to the Bord Bia library. Bord Bia will continue to add additional supports and services to the portal in future years including details of events, Origin Green, insight services and much more.

#### **Route to Market Supports – Retailer Programmes**

Food Academy is a business development programme shared by Bord Bia, SuperValu, and Local Enterprise Offices. Programme participants receive training in food safety, market research and branding, marketing, finance, sustainability and business development. Food Academy celebrated its tenth year in 2023 with Bord Bia marking the occasion by carrying out a piece of research on 'Locally Produced Food'. Over 20 producers went live on shelf in May 2023 as part of the 2022/2023 programme. The 2023/2024 programme commenced in September 2023

with 35 successful candidates selected from 80 applications. Participants who complete the programme will have the opportunity to go on shelf in SuperValu stores in May 2024.

Grow with ALDI was developed by ALDI in partnership with Bord Bia and is now in its seventh year. The programme is designed to help small to medium Irish food and drink businesses secure a listing with a national retailer. Participants take part in a series of capability development workshops on topics such as the Aldi buying process, supply chain management and social media marketing with Bord Bia and ALDI. In 2023, 24 Irish companies were selected to be part of the Specialbuy event which saw their product go on sale for a 2 week period across ALDI's 155 Irish stores. Additionally, three producers were selected as 'winners' in 2023 and had their products listed in 6 Specialbuy slots over a 12 month period. Additional workshops and mentoring are provided to the winners to leverage and accelerate their business development opportunities.

Lidl's Kickstart programme was developed by Lidl in partnership with Bord Bia in 2017. The supplier development programme is designed to help small and medium Irish food and drink businesses to grow their brand and build their supply network. To date, Lidl has invested over €7 million into supporting over 350 Irish food and drink suppliers. In 2023, Lidl took the opportunity to review the programme and to identify how it might evolve in 2024 to better meet the needs of the Lidl business and its Irish supply base. Kickstart will reopen for applications in February 2024.

# HORTICULTURE

## Overview

The horticulture industry includes both the edible and amenity horticulture sectors. 6,600 people are employed in primary production. Overall, the farmgate value for the horticulture industry was estimated in excess of €500m value in 2023.

## Fresh produce market

The retail fresh produce market was valued at €1.75bn in 2023 which was an increase of 7% on 2022. This was driven by higher retail prices, higher purchase frequency but overall lower volumes sold.

Fruit accounted for 47.5% of expenditure, vegetables 37.5% and potatoes 15%. These categories were valued at €832 million, €658 million and €262 million respectively. The food service market for fresh produce performed well in 2023 building on the previous year when the channel fully re opened after the pandemic lockdowns.

## Fruit and Vegetables

2023 was a difficult and challenging year for growers. The weather was very variable with wet and cold conditions in the Spring, drought like conditions in the early Summer and significant levels of rain fall in the second half of the year. Growing and harvesting conditions for outdoor crops was very challenging with yields and quality impacted. While some input costs eased in 2023, this was coming of record high costs in 2022 and costs of production remained high and a significant challenge for all growers. The other major issue for the industry continued to be the availability of labour, as it proved challenging to source adequate levels and quality of staffing for key tasks and operations across the fresh produce supply chain.

## Mushrooms

The mushrooms sector has had a reasonable year in the UK, the main market for Irish mushrooms, where sales similar in volume to 2023, but up by value due to price increases. The sector is performing slightly behind the

general vegetable category in value and volume but has not been subject to the same weather disruptions in 2023 due to their production in a controlled environment which has caused volatility in other produce. The sector has proved resilient, with the volume of exports similar to 2023. In the Irish market, retail sales volumes are down, although there has been an uplift in the food service market.

## Potatoes

The 2023 season was a difficult one for the potato crop in Ireland. Crop area estimates from DAFM suggest the area under potatoes in 2023 was 7,163 hectares, down by 412 hectares from 2022. The main reasons cited for the decline were unfavourable market and weather conditions and the relatively high cost of production, which may have deterred some growers from planting potatoes in 2023. The main factors driving up the costs were the increased cost of fertilizers, pesticides, harvest machinery and land access.

The weather in 2023 was characterised by a cold and wet spring at normal planting time, which delayed planting of the majority of the main crop until May, this was then followed by a hot and dry June. These extremes affected the growth and development of potato plants, resulting in lower tuber numbers and reduced yields. The remainder of the season was dominated by wet weather which made harvesting very difficult.

The domestic market is the key market for the potato industry which was valued at €262m in 2023 at retail level. While volume sales were back the value (at retail) increased.

## Amenity Crops

Output from the amenity sector was estimated at close to €100m farmgate value in 2023. The recent pandemic resulted in an unprecedented growth in the interest in and expenditure on gardening to more than €1 billion by consumers. Now spending habits have largely returned to pre-pandemic levels. However, even in the context of a high inflation economy in 2023, the market has experienced real growth since 2018, suggesting that our

heightened focus on our outdoor spaces during Covid has left a lasting legacy on our attitudes towards our gardens. All categories recorded growth in spend compared with 2018; the most noteworthy shift being in the landscaping services area, which had continued to grow since Covid 19.

Amenity exports declined marginally in 2023, though exports to Northern Ireland grew. Plant and foliage sales were steady, while daffodils exports were in decline. There is still a heightened interest in gardening, in the UK, and export opportunities remain in the North. The UK market is again the main market for Irish production. Sales to all markets were worth €19 million in 2023, a slight decrease over 2022.

## **Horticulture Promotions**

### **EU Potato Promotion campaign**

A new three-year EU and industry funded potato campaign targeted at millennials commenced in 2023. The campaign which is online based is running across the key social media channels, with particular emphasis on Instagram. Traffic is being driven to the campaign website, potato.ie.

### **EU “Life is Better” Fruit and Vegetable Campaign**

The EU funded “Life is Better with Fruit and Vegetables” campaign which launched in 2022 continued to be rolled out in 2023. The aim of the campaign is to increase the level of knowledge amongst millennials regarding the nutritional benefits, versatility, sustainability, and practicality of fruit and vegetables.

The campaign is primarily online with its own social media channels and dedicated website. The campaign incorporates the seasonal promotion of soft fruit, strawberries and the full range of seasonal produce. The website houses local grower videos and profiles the campaign industry funders. Online promotional activity is ongoing across the year and directs the public to the campaign website [www.fruitnveg.ie](http://www.fruitnveg.ie).

### **The UK Mushroom Promotion Trade Initiative**

This initiative supported by Bord Bia in conjunction with the mushroom industry ran consumer mushroom promotional activity during the year across a number of channels including outdoor and digital. The funding for this activity was enabled with funding being secured from the Brexit Adjustment Reserve (BAR) funding. A multi media approach was used including billboards, VOD, Meta, YouTube, TikTok, radio and influencer marketing, targeting grocery shoppers nationwide, with the aim of engaging a younger consumer audience, and produced good interaction with the target market.

### **EU Mushroom Promotional Campaign “Mushrooms, the Hidden Gem”**

The GEPC is the body that represents the European mushroom industry across several countries and is the implementing body for the EU wide promotion of mushrooms campaign, ‘Mushrooms, the Hidden Gem’. It runs in Poland, Netherlands, Spain, France, Germany, Italy, Belgium, Hungary and Ireland. In 2023 the website was launched, <https://europeanmushrooms.eu/en/> with a page dedicated to Ireland and social media activity and influencer activity commenced. In addition, advertorials ran in the Irish Country Magazine in October and December.

### **Best in Season Campaign**

The Best in Season campaign objectives were to increase awareness of the seasonality and benefits of eating fruit and vegetables, motivate consumers to purchase and cook with in-season fresh produce, and drive traffic to the interactive Best In Season calendar on BordBia.ie. The key elements of the campaign included PR and online activity using social media. The annual National Potato Day celebration was held in October with activity across PR, TV and online and which generated significant engagement across all channels.

### **Home Grown TV series**

Over two million viewers tuned in to watch the first series of HOME GROWN, the TV programme sponsored by Bord Bia

showcasing fresh produce and ornamental plants and horticulture related sectors. A second series was recorded across the 2023 season and will be broadcast across seven weeks on RTE from February 2024. Consumer and industry evaluation research carried out after the series aired reported a high awareness of the programme and its educational significance in profiling the horticulture industry and building consumer knowledge of the range of produce and plants grown locally.

## **Schools Programmes**

### **Food Dudes Programme**

The EU School Fruit and Vegetables Scheme is implemented in Ireland through the Food Dudes Healthy Eating Programme. The Food Dudes Programme is an evidence-based incentivised behaviour changing initiative which is managed by Bord Bia and funded by the Department of Agriculture, Food and the Marine, and the EU. The Food Dudes Programme aims to increase sustained fruit and vegetable consumption amongst primary school children through the provision and repeated tasting of fruit and vegetables.

In 2023, the first cohort of schools completed the full Food Dudes cycle. To celebrate their success and encourage their continued participation in the programme, Presentation Days were held across the country, with schools awarded a plaque. Several updates have been made to the Food Dudes programme over the year, including a move for senior pupils to a 5-day (rather than 8-day) intervention period, updated resources, updated website layout and a move to a 4 year cycle of participation.

A total of 1,512 schools and more than 233,000 pupils participated in the programme in 2023.

### **Incredible Edibles**

The Incredible Edibles is a school-based programme with the aim of engaging children to grow their own fruit and vegetables in school and at home, thus increasing awareness of their role in a healthy and balanced diet. Jointly

funded by the horticulture industry with support from government departments and Bord Bia, the programme is managed at school level by the agri-food educational body, Agri Aware. In 2023, 1592 schools and 79,841 pupils participated in the programme, with over 2,000 packs (approx. 1800 grow packs and 262 seed packs) dispatched to participating schools. The programme saw both online and in-school activity around the five core programme tasks, with events including a national Meet the Farmer Zoom, a healthy eating week in May, and school visits to Bloom at Phoenix Park. The programme was launched for the current school year in October 2023, with schools commencing their activities from February 2024.

### **Healthy Heroes**

Healthy Heroes Lunch Club is a primary schools' lunchtime initiative from the Irish Bread Bakers Association (IBBA) and Bord Bia which aims to help children change their eating and fitness habits for the better. The programme teaches about nutrition and how to boost their activity levels, all while having fun in a non-competitive environment. This includes easy-to-understand information on the food pyramid and the contents of the ideal lunch box, encouraging children to engage more with the foods they eat.

The programme aims to recruit around 500 schools annually to participate, with most activity taking place from January to June. Each month of the school year, a school is selected as "School of the Month", with local PR around the programme and the benefits of participation for schools and pupils. In 2023, for the first time, Healthy Heroes had a presence at Bloom, with exercise sessions in the Kids Zone and one of the School of the Month winners invited to attend.

### **Gardening promotion**

"Let's Grow" is the banner under which all gardening promotion activity is carried out. The focus is primarily on social media and this was utilised to promote seasonal plants, while a call to action for consumers to plan for the gardening year promoted the Easy Steps to Dream Gardens plans and planting lists on the Bord Bia website which drove consumers

to the Bord Bia website for advice and information. The gardening promotion activity was amplified further through the creation of one of the Dream Gardens at Bloom.

### EU Green City Campaign

There were 13 EU countries involved in the EU Green Cities campaign, including Ireland. The campaign is aimed at policymakers, city planners, city decision makers, landscape architects and developers to recognise the value and benefits of including more green spaces in cities. The campaign was in the last of its three years of activity in 2023. The campaign encouraged an Irish entry to the European Green Cities award, and for the Irish Green Cities award, with a record number of entries obtained. Other key activity in 2023 included the designing and installation of a Green City show garden at Bloom in conjunction with Dublin City Council and the ALCI and the holding of a Green City seminar in the Autumn.

## **Horticulture Programmes**

### Marketing and Innovation

Under the Bord Bia Marketing Assistance Programme, horticulture companies availed of grants in 2023 to build and improve their marketing capabilities.

### Lean Management

Lean management principles are an aid to help businesses increase productivity. Assistance was provided to several horticulture businesses during the year. The programme helps companies set metrics for business performance, looks at management and reporting structures, and identifies areas for cost saving and productivity increases.

### Amenity Export Development Programme

The Amenity Export Programme is targeted at amenity horticulture business owners looking to build on existing export sales or enter export markets for the first time. These companies are engaged in cut foliage, bulbs and flowers, Christmas trees and garden plants. In the autumn, exporting nurseries attended dedicated personalised export consultancy sessions with a UK based amenity sector

mentor. There were a high number of consolations last year, and some growers consider diversification into the UK. There was an ongoing support programme to help producers understand changes in UK import regulations coming in 2024.

### Horticulture Insights

The Bord Bia/Ipsos Value of the Garden Market study was conducted during 2023. This measure has been carried out since 2001, and tracks spend and consumer trends across the garden market. After an unprecedented spike in activity and spend in the gardening market sector during Covid, habits have largely returned to pre-pandemic times. However, even in the context of a high inflation economy in 2023, the market has experienced real growth since 2018 achieving a value of just under €1 Billion.

### Sponsorships

Bord Bia supports the needs of the horticultural industry through the provision of sponsorship of relevant conferences, seminars and workshops as well as events organised by other organisations which Bord Bia is associated with. This included supporting plant fairs in the amenity sector. A key event was the GLAS tradeshow which took place in July in Dublin. Bord Bia is the key sponsor for the tradeshow and is part of the organising committee. There was strong representation by industry exhibitors on the day and visitor numbers were high. Bord Bia exhibited at the event, showcasing services for the industry and highlighting current research for the gardening sectors.

# ORGANIC

## Organic activities

Bord Bia is continuing to support the growth of the Irish organic sector both in Ireland and in key export markets. In Ireland, the focus is to encourage more Irish shoppers to consume Irish organic food and drink while in export markets, the focus is on building the awareness of Ireland as a producer of organic food and drink, as well as supporting Bord Bia's clients with new listings across Continental Europe, the UK and in international markets.

## Stakeholder Engagement

Bord Bia participates in the Organic Strategy Forum which has representation from across the organic sector with 27 stakeholder members and meeting every two -three months. At each meeting Bord Bia would present on recent market developments and latest consumer trends. Throughout 2023 Bord Bia supported key organic stakeholders through presenting at a number of Teagasc National Farm Walks, events such as the launch of the organic mart at Sixmilebridge, producer group meetings and key sector conferences such as Biofarm 2023.

## Events

Two key events for Bord Bia to promote organics were Bloom and The National Ploughing Championships. The Bloom event saw Bord Bia host 13 Irish organic clients in the dedicated organic corner in the Food Village. This was the only area within the food village with overhead branding to help identify the organic clients exhibiting. Additionally, across from the Food Village was an organic garden which was delivered through the Bord Bia Horticulture team and DAFM. The second key event at the National Ploughing Championships, where Bord Bia had a stand in the Organic Village, helped Bord Bia to communicate to farmers all of the activities Bord Bia are delivering to support the Irish organic sector.

## Trade Shows

In 2023 Bord Bia delivered two trade shows to help support Irish organic client companies deliver new leads but also engage with existing export customers. The first trade show was Biofach, which is the number one global organic trade show which is held in February in Germany. Bord Bia hosted eight organic client companies on the Origin Green Organic stand. Over the course of the show, over 60 quality leads were delivered worth millions in new business over the next 18 months. In October 2023, Bord Bia had a stand at Natexpo Paris for the first time. This is the largest organic trade show in France, a market worth over €12 billion annually. Bord Bia hosted nine organic clients on the stand with a number of new business contracts won with both multiple and speciality retailers across France.

## Trade Mission

In 2023 coinciding with both the Biofach and Natexpo trade shows, Bord Bia with DFAM and DFA delivered two trade mission with Minister Hackett to Germany and France. As part of the trade mission the Irish delegation had five customer meetings and three meetings with national organic agencies and food bodies to help identify learnings for the promotion of the Irish organic sector. Additionally, a media and trade event was hosted on the Irish organic pavilion at Natexpo to further generate B2B PR in the French market with four trade journalists in attendance and a number of one-one interviews following the event.

## Consumer Research

In 2022, Bord Bia conducted a six-month consumer research project on the Irish market with a focus on the Irish organic shopper. Through the research over 2,600 Irish organic shoppers participated through both quantitative and qualitative techniques including 12 focus groups and ethnography. This research helped to design the organic consumer marketing proposition and informed the new national marketing campaign launched in Ireland in October 2023.

## Client Webinars

Two client webinars were delivered in 2023 with a total over 50 attendees across the webinars.

The first webinar was an overview of the French organic market delivered in conjunction with the Paris office. The second webinar was the dissemination of the insights from the Irish market consumer research including bespoke category debriefs for clients to use as part of their own commercial and marketing plans in Ireland.

### **Ireland Market Campaign**

In October, Bord Bia launched its largest national organic marketing campaign in Ireland. This seven week campaign used a number of channels including out of home, radio, podcasts, video on demand, social media and influencer partnerships. The campaign tagline was “make your meals a little More-ganic”. The campaign objective was to encourage shoppers to increase their current Irish organic food and drink consumption by including more Irish organic products in their weekly shops. The campaign delivered over 6 million reach, including 1 million completed video views.

### **EU Co Funded Organic Beef & Lamb Campaign**

Bord Bia was successful in its application for a three-year, EU co-funded campaign for organic beef and lamb in Germany, Belgium, Sweden and Austria worth €2.7 million. The campaign will run from 2024–2027 and is a B2B education and informative campaign. Over the lifetime of the programme, this budget is expected to deliver 16 Organic Meat Academies, 12 Inward study visits, six trade shows and a cross market B2B marketing campaign.

### **Export Market Promotions**

Bord Bia secured a number of Irish organic promotions across priority export markets, including the UK and Continental Europe. Campaigns include Irish organic beef promotions in retailers such as Vomar in the Netherlands and Ocado in the UK. Additionally, there was Irish organic seafood consumer promotions in France and Germany.

### **Organic Seafood Promotion France**

The campaign was mainly digital in format with Bord Bia’s promotional Irish organic salmon video being run across a range of online media

platforms in France that target consumers of organic food and seafood. To compliment this an on pack label was shared with Irish salmon suppliers to the French market. This label gave additional visibility to Irish origin in store and the QR code linked to Bord Bia’s organic salmon landing page at <https://www.irishfoodanddrink.com/saumon-bio-irlandais/> where consumers can read about Irish organic salmon and see our promotional video in full. This on pack sticker gave great brand visibility and helped to raise awareness and build loyalty for Irish organic salmon in the French market.

# Origin Green

## Bord Bia's Commitment to Sustainability

Bord Bia's commitment to sustainability of the Irish food, drink and horticulture industry, is manifested through the development and continued evolution of the Origin Green programme. The Origin Green programme enables Ireland's food industry to set and achieve measurable sustainability targets that respect the environment and serve local communities more effectively. It is about measuring and improving on an ongoing basis, with independent accreditation and verification built into every stage of the supply chain. Bord Bia collaborates through the Origin Green programme, with over 61,000 farms and over 300 leading Irish food and drink companies to prove and improve the sustainability of the food they produce to meet the evolving needs of global customers and consumers. Verified Origin Green members account for 90% of our food and drink exports.

Origin Green supports the food, drink and horticulture industry by operating and developing market leading standards, providing guidance, tools and metrics to drive sustainability improvement, and inspiring best practice and recognition in the marketplace.

## Origin Green – For Farmers

On-farm assessments constitute a key component of the Origin Green programme. The rollout of sustainability assessments at farm level has been made possible by Bord Bia's pre-existing quality assurance infrastructure, which has been in place for over 20 years. This infrastructure facilitated the delivery of more than 720 farm audits each week in 2023 by a team of close to 120 independent farm auditors. To date, over 330,000 carbon assessments have taken place on beef and dairy farms.

The schemes have been designed to assess farming practices and record data to demonstrate the sustainability of Irish farming in a systematic way at an individual farm level,

thereby providing the necessary proof to customers that Irish farm produce has been produced under sustainability and quality assurance criteria. The schemes are built on best practice in farming and processing, current legislation, relevant industry guidelines and international standards, and are included in Bord Bia scopes of accreditation to ISO 17065:2012 with the Irish National Accreditation Board (INAB).

## Membership

Across the various producer schemes, more than 52,000 audits were completed in 2023. Of this, 41,717 audits were carried out against the Sustainable Beef and Lamb Assurance Standard and a further 9,697 against the Sustainable Dairy Assurance Standard. Membership of the primary producer schemes at the end of 2023 was as follows:

Scheme	Members per Scheme
Sustainable Beef and Lamb Assurance Scheme (SBLAS)	60,420
Sustainable Dairy Assurance Scheme (SDAS)	15,983
Sustainable Egg Assurance Scheme (SEAS)	255
Sustainable Poultry Products Assurance Scheme (SPPAS)	554
Sustainable Horticultural Assurance Scheme (SHAS)	261

## Origin Green – For Manufacturers, Retail and Foodservice

For manufacturing, retail and food service, the focus of the Origin Green programme is the development of a sustainability plan with clear, measurable and time bound targets in accordance with the Origin Green Sustainability Charter. As part of this process, each participating company commits to developing a multiannual sustainability plan for their business. This plan outlines robust, measurable targets that are relevant to their business in three key areas, namely raw material sourcing, manufacturing processes and social sustainability. Companies undertake a multi-stage plan development process to ensure they



select ambitious targets, supported by sustainability workshops, consultation with a sustainability mentor and feedback from Bord Bia. Every Origin Green member's plan is independently verified, and targets are reviewed and monitored for continuous improvement on an annual basis by Mabbett, a leading global inspection, verification, testing and certification company.

Approval by Mabbett indicates that a company's Origin Green sustainability plan meets the minimum standards required to attain Origin Green membership. The independent verification of Origin Green plans is a vital and central element of the programme. Following ongoing plan refinement, Origin Green members must submit a comprehensive review of their sustainability plans annually to highlight progress against the targets set.

### **WE MUST DO 1: Build Food Brand Ireland and further develop its proof points.**

**Deliverable 1: We will build a brand (Food Brand Ireland) that resonates with customers and create a set of market-led benefits that clients are actively using to generate greater value in 2022, 2023 and 2024.**

#### **Gold Members:**

In 2023, 97 Origin Green member companies were awarded Gold Membership for the year. Gold Membership is awarded to member companies who have exceeded their annual performance on their sustainability targets in areas such as raw material sourcing; water and energy efficiency; waste reduction; packaging; and social sustainability, based on the assessment of an independent verification authority, Mabbett.

Since the establishment of the awards in 2020, 234 Irish food, drink and horticulture companies have been awarded Gold Membership. Each year, the number of awardees has increased, highlighting the number of Irish companies that are committed to sustainability in the Irish food and drinks sector. Of the total 97 Gold Members for 2023, 80% of those are small to medium-sized enterprises (SMEs). This showcases the

true efforts and passion that small businesses have towards developing sustainable practices.

Gold Members provide inspiration to other member companies and are profiled as best in class examples to customers via the Origin Green Website, case studies, colleague presentations, trade, business and regional press.

#### **Origin Green Progress Report**

The Origin Green 2023 Progress Report was published in November. The report presents an overview of the latest developments to the Origin Green programme in 2022 and 2023 and provides an update on members in the programme, covering the period of 2020 – 2021. Origin Green member information for this period was verified and audited over the course of 2022 and is now being reported in 2023. This includes progress updates on verified Origin Green members at the producer level, at the manufacturing level, and the retail and foodservice level.

#### **Origin Green: Sustainability Seminar**

In November the Minister for Agriculture, Food and the Marine Charlie McConalogue TD opened the 2023 Origin Green Sustainability Seminar which officially announced the 2023 Gold Members. The seminar featured panel discussions from Origin Green manufacturing members and customer retail and foodservice members, a briefing on the Corporate Sustainability Reporting Directive (CSRD) and thought leadership presentations from the Bord Bia Thinking House and other industry expert and update on the latest Origin Green Progress Report and supports available from the Director of the Origin Green programme.

**Deliverable 2: We ensure that Origin Green supports the development of Ireland's sustainable food systems in line with market needs.**

Since its launch a decade ago in 2012, Origin Green has supported progress in the Irish food and drink industry's journey to a more sustainable future, creating a point of differentiation in export markets. Bord Bia's strategic ambition for the next 10 years is to capture value in the market by building on Ireland's strength in sustainability. In 2023,

focus was on the next era of development which will be delivered through the new Origin Green strategy called Powered by Partnership. This new strategy recognises that fostering collaboration with like-minded organisations is key to Origin Green delivering on the new level of ambition required by industry.

Throughout the year, work focused on delivery of the programme’s three strategic objectives. The delivery of these objectives will ensure that Origin Green continues to evolve, expand and maintain its leading position. Origin Green remains the world’s only national food and drink sustainability programme that drives sustainability improvements across the entire supply chain on a national level.

**Objective Number 1: Operate and Develop Market Leading Standards**

It is essential that Bord Bia continues to drive sustainability improvements, to enable development of claims that Irish food and drink is sustainably produced. Developing farm and company programmes and supports is the main mechanism through which Bord Bia drives sustainability improvement.

**Bord Bia Primary Producer Standard**

In 2023 Bord Bia commenced it’s technical standard review process, which involves the reviewing of all primary producer standards into one consolidated Origin Green Primary Producer Standard with shareholders. The Technical Advisory Committee process commenced in May 2023, and to-date 5 out of a total of 6 modules have been presented to the relevant TAC’s. In order to streamline the process, criteria relevant to multiple or all species have been agreed at an All-Sectors TAC level, with the species-specific criteria agreed at the various sectoral TAC’s. The 6 modules that make up the Origin Green Primary Producer Standard are as follows:

- A. Management Commitment
- B. Environmental Stewardship
- C. Quality and Traceability
- D. Animal Care
- E. People and Community

**Sustainability Action and Continuous Improvement**

**Grass Fed Standards**

Bord Bia launched a Grass Fed Standard for beef and dairy in 2020, the world’s first to launch on a national scale, that enables tracking and verification of the percentage of grass consumed in the diet of Irish dairy and beef herds. Almost half of global consumers associate Ireland with grass-fed beef and dairy. As such, the standard was developed in direct response to the growing international consumer and customer demand. Throughout 2023, the Origin Green team supported processors to join the Grass Fed programmes through technical and market support, auditing, development of an understanding of the various supply chain types and provision of a logo use policy.

**Carbon Footprinting Results**

The transition of the carbon footprint calculations to the Irish Cattle Breeding Federation (ICBF) was completed in December 2022. All beef and dairy carbon footprint calculations are now being calculated by ICBF. To year end 2023 over 370,000 carbon footprint calculations have been completed for SBLAS and SDAS members since 2013.

Members of SDAS have reduced their average carbon footprint by 9% since carbon footprinting began in 2013. The average SDAS carbon footprint is 0.91kg CO2e/kg of FPCM with the top 10% of SDAS herds having a carbon footprint of 0.76kg CO2e/kg of FPCM.

Members of SBLAS have reduced their average carbon footprint by 8% since carbon footprinting began in 2013. The average SBLAS carbon footprint is 9.22kg CO2e/kg live weight gain with the top 10% of SBLAS herds having a carbon footprint of 6.30 kg CO2e/kg live weight gain.

Carbon Footprint Calculations Completed	SBLAS	SDAS
2023	33,336	8,834
To Date	286,631	88,067

## **Emissions**

At the manufacturing level of the Origin Green programme, participating companies are required to develop a comprehensive multi-annual sustainability plan with clear, measurable and time-bound targets in order to drive impact at a large scale in the area of emissions. There is a mandatory carbon emission target for Origin Green members with a turnover greater than €50 million. 54 Origin Green member companies developed carbon emission targets for the annual review period.

## **Food Processor Standard**

The two Bord Bia food processor standards, the Meat Processor Quality Assurance Standard and the Prepared Fruit and Vegetable Standard, were updated into a combined Food Processor Standard in 2022. The Standard was approved by INAB and throughout 2023 members were audited against the standard as it became mandatory. The new standard has been structured in a modular fashion, allowing members to tailor their scope of certification to match the business activities and products marketed as Bord Bia Quality Assured. The modular approach facilitates the adoption of a more agile and flexible response to changing market and legislative demands with regards to the requirements within the Standard.

## **Objective Number 2: Provide Guidance, Tools and Metrics to Drive Sustainability Improvement**

A fundamental part of Origin Green involves supporting Irish food and drink manufacturers to set and achieve ambitious sustainability targets. A variety of tools and resources are available to participating companies as they work to achieve full verification, as well as to retain their verified member status year-on-year. The available supports in 2022 included:

### **Provision of an Origin Green Mentor**

Each Origin Green company was assigned a one-to-one mentor to assist in drafting sustainability plans and completing annual reviews. These mentors offered support and guidance throughout the process on an individual company basis to ensure a tailored service.

## **Plan Development Workshops**

Bord Bia's Origin Green team ran 26 introductory webinars during 2023 which assisted companies in understanding the programme and developing their plans. All members are offered one-to-one advice on how to leverage membership and how and where to communicate their sustainability commitments. A series of webinars and guidance documents were delivered throughout the year to help members stay on top of sustainability topics such as pathways food waste prevention, pathways to new zero and sustainable packaging, and pathways to pollinator-biodiversity.

## **Origin Green Academy**

Introduced in May 2023, the Origin Green Academy supports Irish food, drink, and horticulture businesses to develop industry leading sustainability talent and the skills required to achieve ambitious emissions reductions across the sector, accelerate their sustainability progress, and meet the expectations of global consumers and legislative requirements such as the Corporate Sustainability Reporting Directive (CSRD).

The Origin Green Academy provides a suite of supports to Origin Green member companies on a one-to-one, sector-specific, and programmes level basis. It integrates Origin Green's existing sustainability supports, which include over 20 sustainability guidance webinars held in conjunction with sustainability experts, companies, and partner organisations, seven in-depth sustainability topic guidance documents, and a range of marketing communications and supports. The Academy also provides a platform for Origin Green member companies and leaders to exchange innovative ideas and foster new thinking around the most pressing sustainability related challenges of today.

A key component of the Origin Green Academy is the introduction of food and drink sustainability specific training programmes called 'Pathway Programmes'. Bord Bia has partnered with Skillnet Ireland and the Sustainable Enterprise Skillnet to develop a series of sustainability training programmes for

Origin Green member companies. These programmes are principally for Origin Green member company representatives who are responsible for developing their company's Origin Green plan.

Tailored to Origin Green members, these programmes focus on the sharing of best practice, highlighting the value of the member network as a forum to discuss sustainability management challenges in an open and collaborative manner across organisational boundaries.

### Pathways to Net Zero Programme

This programme equips participants with the knowledge and know-how to empower them to adapt to the complex landscape of emissions and reporting requirements. Specifically, it provides participants with the necessary understanding to develop a master plan to complete the Origin Green emissions reporting and undertake the Corporate Sustainability Reporting Directive (CSRD) climate change reporting requirements. Throughout the programme, participants will have access to industry-led research, international best practices, standards, tools, and real-life case studies.

### Pathways to Sustainable Packaging

This programme is designed to equip participants with the know-how to integrate sustainable and optimised packaging practices into their business activities. Taking a structured approach, the programme aligns emerging legislation requirements and targets with industry-led research and international best practices.

By completing this programme, participants will:

- Understand the key legislation and policy requirements in relation to the circular economy and sustainable packaging management.
- Identify business and financial drivers.
- Evaluate the current packaging portfolio using techniques such as Life Cycle Analysis and Cost/Benefit Analysis.

- Develop a stakeholder engagement plan for internal and external stakeholder communications and education.
- Create a sustainable packaging strategy including targets, KPIs and action plans for optimised packaging solutions.

### All Ireland Pollinator Plans

The All-Ireland Pollinator Plan (AIPP) unites various sectors to establish a pollinator-friendly landscape across the island of Ireland. Led by the National Biodiversity Data Centre, the plan encourages businesses of all sizes to support pollinators. By pledging action, these organisations contribute to broader goals of ecosystem sustainability, agricultural support, and food security.

Pollinators, such as bees, are globally crucial, as 71 of the top 100 food crops depend on them. In Ireland, insects pollinate over three-quarters of wild plants, supporting biodiversity and ecosystem health.

The AIPP offers an entry-level scheme for businesses to participate in biodiversity action. Business supporters of the AIPP enjoy a range of benefits from a simple, user-friendly framework evidence-based actions and companion resources to help in decision-making, to an annual review mechanism including a publicly available GIS-based biodiversity mapping portal. The initiative also provides tools for businesses to identify, measure and monitor changes in pollinators over time, offering low-cost, nature positive actions tailored to every business type.

In addition to AIPP Business Supporters, which numbered 316 in December 2023, 59 of whom are Origin Green verified members, the AIPP has partners comprising over 100 government/NGO supporters and all of the island's local councils, as well as thousands of farmers, communities and gardeners all taking AIPP evidence-based actions.

In collaboration with the AIPP, the Origin Green Academy has conducted a series of impactful webinars under the Origin Green: Pathways to Pollinator-Biodiversity series.

Highlighting the importance of the AIPP, it has been included within the Origin Green Charter as an optional biodiversity target for member companies. As AIPP Business Supporters, Origin Green members can use the step-by-step process to:

- Identify and deliver evidence-based actions for business.
- Map and report annually on actions for pollinators (GIS) via the annual review process.
- Monitor formally how pollinators are responding through the Flower Insect Timed (FIT) count app and the Bumblebee Monitoring Scheme.

### Farm Sustainability Learning Hub

By the end of 2023, 9,500+ users registered on Bord Bia's Farm Sustainability Learning Hub. The Learning Hub, which was made available for scheme members in October 2021, hosts a range of modules covering farm sustainability topics such as antimicrobial resistance, greenhouse gas emissions, biodiversity and sustainable energy which were created with stakeholders such as Department of Agriculture, Food and the Marine (DAFM) and Teagasc. Bord Bia also worked with two dairy processors and other key stakeholders to develop custom courses for milk suppliers which are linked to the processors' sustainability bonus schemes. The courses, which were available from Q1 2023 onwards, cover a multitude of topics, including water quality and farm emissions.

Additionally in 2023, development work commenced for Animal Welfare (for beef, lamb, and dairy) and Farmland Pollinator modules in conjunction with Animal Health Ireland, Teagasc, and the National Biodiversity Centre of Ireland which are set to launch in Q1 2024. Bord Bia will continue to engage with its farm and processor members in 2024 to increase knowledge and awareness around farm sustainability through the Farm Sustainability Learning Hub.

### AgNav

AgNav is a sustainability platform developed in

partnership between Bord Bia, Teagasc, and the Irish Cattle Breeding Federation (ICBF). It is a farmer-centric support framework, which utilises the collective knowledge, data, and support tools of the three agencies and provides farmers with accurate and verifiable data to support decision making on their farms. The rollout of the AgNav platform commenced in Spring 2023, with ongoing developments aimed at enhancing functionality and accommodating additional farm system types. The AgNav Forecaster tool allows farmers to analyse the potential impact of implementing various sustainability actions on their farm emissions. Farmers and/or their advisors can then use the AgNav Action Planner to create a bespoke sustainability action plan based on the most appropriate actions for their farm.

The AgNav process can be broken down into three steps:

- Assess – AgNav calculates current farm performance across key environmental indicators using data from Bord Bia and ICBF.
- Analyse – Farmers and/or their advisors determine the impact of specific sustainability measures using the AgNav Forecaster tool.
- Act – The development of a farm sustainability plan using the AgNav Action Planner serves as a roadmap for farmers, guides farmer-advisor engagement, and demonstrates progress at farm level.

### Farmer Feedback Reports (FFR)

The FFR continues to be dispatched upon certification to members of SDAS and SBLAS, with 28,000 farmers receiving a FFR in 2023. Since 2020, over 94,000 reports have been issued to farmers along with their certification letters. Database tracking of farmer engagement indicates an increased uptake of members accessing their report online. Since October 2021, 29,500 farmer feedback reports have been downloaded by members. In 2023, 16,057 members of SBLAS and SDAS accessed their report online.

### Objective Number 3: Inspire best practice and recognition in the marketplace.

The overall intention of Origin Green is to create a significant point of differentiation for the Irish food and drink industry in the area of sustainability. It provides companies with proof of their sustainability credentials and commitments that can be shared with third parties such as trade customers, stakeholders and the general public.

the key findings from Bord Bia's 'Sustainable Nutrition Barometer' research project.

Throughout 2023, international conference organisers, domestic and international government bodies and key Irish food and drink customers have requested members of the Origin Green Team to speak about the development and ongoing results of the Origin Green programme. These speaking events have driven awareness and understanding of the Origin Green programme to both domestic and international audiences. Some highlights of the year are as follows:

#### **Sustainable Agricultural Initiative (SAI)**

In 2023, the Origin Green Team took part and hosted number of webinars with the SAI Platform Dairy Working Group. The Origin Green programme has achieved equivalency with the Sustainable Dairy Partnership (SDP). A module for dairy processors report their equivalency to the SDP has been integrated into the Origin Green charter and Mabbett audit process.

#### **Origin Green Global Council**

Bord Bia formed the Global Council to create a thought leadership forum to shape the discourse on emerging marketplace food and drink sustainability topics. The Global Council brings together leaders from the food and drink industry across the globe and international experts in the field of sustainability, selected for their expertise and specific interest in key sustainability issues. The fourth Origin Green Global Council meeting was held in January of 2023. The meeting discussion focused on Origin Green's 2024 work programme and reflected on the programmes 2023 results as set out in the Origin Green - Progress Update Report 2023. At the meeting we member's provided feedback on the new Origin Green Biodiversity Strategy Guidance and discussed

# STRATEGIC INSIGHT AND PLANNING

The Thinking House, Bord Bia's world-class strategic insight hub, provides leadership to industry and the organisation by leveraging powerful consumer, category and market insights to drive strategy development in pursuit of growth. Work comprises long-term, industry facing activities focused on creating the conditions for future success, and shorter-term bespoke work for Bord Bia's client companies, addressing immediate challenges and opportunities to drive growth and capture value.

Thought leadership work includes foresight, insight and trends studies designed to help client companies navigate both current and future challenges. Client capability development includes sharing commercial marketing knowledge, skills, tools and best practices, fostering clients' long-term sustainable growth. The brand development, innovation and client insight team works directly with client companies to deliver bespoke projects to capture and create value. This work is underpinned by that of the knowledge management and market intelligence team, which facilitates insight-led and data driven decision making.

## Insight, foresight, and trends

This work includes thought leadership, and industry, market, category and client insight. Projects conducted in 2023 included:

### *Cultivate: Consumer Lifestyle Trends*

A large scale, global programme of research that surfaces, tracks, and measures emerging behavioural trends over time. The study offers a series of innovation pathways, uniquely designed to help food and drink businesses stay up-to-date with the living world of consumer trends and to navigate these trends in pursuit of sustainable value capture and creation

### *European Meat Shopper Insights*

This is an always-on tracker of grocery shoppers across the priority European markets of Ireland, UK, Belgium, Netherlands, Italy, Germany and Sweden. The research's objective is to help support meat clients' understanding of retail and consumer trends and their category partnership with key retail customers.

### *Culinary Trends*

This foresight study on emergent culinary trends was designed to inspire and inform innovation opportunities across markets in the context of product development, recipe and ingredient opportunities.

### *The Consumer and Carbon*

This study was launched in February 2023. It explores consumer awareness and understanding of the journey towards net zero. The research reviewed consumer attitudes, awareness and comprehension of carbon emissions and existing carbon labelling. The study also assessed the best way to communicate carbon emission reduction in-store. Overall, the study will help clients and customers identify innovation opportunities and address their branding, labelling and communication strategies in the move towards net zero.

### *Striking the Balance - Protein Diversification*

A study to examine and contextualise the plant-based and protein alternative opportunity for Irish food and drinks businesses in global markets.

### *Inflation Impact*

An ongoing, multi-market tracking study designed to understand the financial challenges people are facing and how they are responding to the range of ongoing crises. Specifically, it sets out to address the impact on their food shopping and eating behaviours and their evolving relationships with food and drinks brands within this context.

### European Meat Shopper Insights

This consumer tracker in seven European markets continued in 2023. It provides insight on purchase and consumption behaviour around the meat category, and specific purchase drivers in the beef category. This insight is designed to support clients' category management and their relationships with customers. A European trends report is available every quarter, along with individual market reports. Customer-specific data is also available for all major retailers on request.

### Future of Dairy in the UK

This insight study sought to identify what direction the UK dairy category is likely to take in the coming years, with a primary focus on understanding how consumer behaviours and attitudes are evolving within this space. There are several macro factors impacting the UK market currently, including the cost of living crisis, inflation, food security issues and evolving consumer behaviours/dietary lifestyles driven by health and sustainability. The study explores the relevant challenges and opportunities for Irish dairy exporters against this backdrop, and how to navigate same in the coming years, with a focus on identification of clear opportunities and challenges for Irish dairy and relevant client companies.

### US Spirits Consumer Vista

Consumer research designed to help Irish spirits producers understand the US spirits consumers, how purchase and consumption is changing, and how Irish Spirits (with a particular focus on Whiskey) fits into this landscape in order to identify future opportunities for growth.

### Sustainable Nutrition Barometer

The first in a planned series of consumer research tracking changing consumer attitudes and behaviours, focused on sustainability and nutrition (launching in 2024)

### Consumer Taste n' Tell

This programme provides a quantitative measurement of product performance and concept appeal with Irish consumers so as to optimise commercial success. The risk of innovation is reduced not just through the screening and evaluation of new product

concepts but also benchmarking them against competitors.

### BI:TES Concept Iteration & Validation platform

This bespoke global innovation tool, *Better Ideas: Think, Evaluate, Select*, known as BI:TES, allows companies to test and iterate new product ideas rapidly to allow for quick-fire incremental step-by-step improvement of concepts based on consumer feedback. This platform can deploy short feedback forms rapidly.

### Knowledge and market intelligence

#### Library Services

Bord Bia offers best in class library services, reference librarians and knowledge and market intelligence to further enhance stakeholder and sector knowledge of prioritised markets.

Library activities in 2023 included provision of knowledge guides around how to use the library most effectively, reviews of category intelligence and market understanding reports, and information literacy support. Library services also included providing information and induction sessions to new staff and Talent Academy participants. This included introductions to LinkedIn Learning, and Bord Bia's internal insight engagement platform, THE SOURCE.

A number of "Insightful Articles" were published by the Knowledge and Market Intelligence Team in 2023. Topics included "Resources to Help you Understand Consumers", "tips on how to make strategic thinking a habit" and "How to influence the "Price is Right" decision".

#### Performance and Prospects

Bord Bia's Performance and Prospects report for 2023/24 was launched on January 10th, 2023. This report aims to inform stakeholders in the food industry of the performance of Irish food and drink exports for 2023 and the prospects for the year ahead. A new feature of the report this year was the exporter sentiment survey which was a pulse check to provide a better understanding of the exporter sentiment towards the trading prospects for 2024.



The Performance and Prospects dashboard was developed in 2022 has now been incorporated into Performance and Prospects hub. This enables users of the Performance and Prospects hub to drill down into Irish food, drink and horticulture exports by category, subcategory and region, and to display values in monetary terms, volume (tonnes) and on a per unit basis. This dashboard empowers users to derive market insights more efficiently.

### *Dairy Market Report*

This bi-monthly report covers updates and forecasts on global milk and focuses on market developments in China, South East Asia, Middle East and North Africa. The report is compiled by StoneX and includes market commentary from Bord Bia staff working in these markets. The report was circulated to Bord Bia's dairy ingredient clients.

### *Kantar*

Five Kantar category presentations were made to clients on the bakery, frozen, hot beverages (tea and coffee), chocolate soups and chilled ready meals categories. Each presentation was accompanied by library inductions by Bord Bia's reference librarians.

Kantar bi-annual presentations for Bord Bia colleagues and members of the meat consortium recommenced in took place with a Christmas meat trends review in March 2023 and a summer meat trends presentation in August. These events included a presentation from Kantar on the latest trends in meat which was complimented a presentation on Consumer lifestyle trends through a meat lens in March and IGD giving a presentation on the UK meat shopper in August. This was also accompanied by attendees being made aware of the latest meat reports from the Bord Bia library collection. In addition, Kantar also presented to meat consortium members the results of their shopper pulse survey and are now providing monthly retail updates to the consortium also.

### *Global Trade Data*

Bord Bia has a subscription to the Global Trade Atlas which provides access to data on global trade in food, drink and horticulture across the globe.

### *Shopper Intelligence*

In 2023, a pilot was undertaken to purchase two categories from Shopper Intelligence. Firstly, Chilled Ready meals where the objective was to give clients and Bord Bia staff knowledge on how to grow the category in Ireland. The second category was on boxed chocolates where the focus was to look at how domestic brands could grow market share in this space. These presentations were delivered via webinar to clients and staff with follow up workshops for clients to explore key topics or themes of interest in greater detail.

### *Membership of GIRA's Meat and Dairy Clubs*

The Knowledge & Market Intelligence team managed the membership of GIRA's meat and dairy clubs to ensure authoritative industry knowledge on animal proteins is acquired, managed and disseminated to drive strategy.

### *Brand development and innovation*

#### *Bespoke Brand Development and Innovation*

Work here is anchored in the delivery of full-service, end-to-end bespoke sustainable brand development and innovation projects, activities, and consultancy. Bord Bia offer expert guidance, strategic thinking, and project management to Partner and Club+ clients on work which is informed by sector strategies, prioritising projects and activities which reinforce and build sustainability credentials. This work includes strategic planning, proposition building and targeting, visual identity creation and brand activation. In 2023, Bord Bia worked with 86 client companies on brand development and innovation projects.

#### *Bespoke Market Research*

This work centres on delivery of full-service qualitative and/or quantitative consumer research, delivered end-to-end by an in-house insight specialist or outsourced third party expert. This primary research is focused on helping client companies to create and capture growth. Projects here include exploratory research, concept development, proposition development, marketing strategy development and innovation development.

#### *Bespoke Brand Activation Service*

This activity provides client companies with expert guidance, strategic thinking and project

management on both short-term, performance marketing and longer-term, incremental brand equity building activities. This is an end-to-end service delivered by Bord Bia's brand activation specialist staff.

### SuperBrands

SuperBrands is a tightly defined, end-to-end brand development service for smaller businesses. Participating companies are assisted with brand strategy, value proposition and targeting. A creative brief is produced for a design agency to develop a new or refreshed brand identity which is then brought to life on pack design or other consumer touchpoints, and codified in a set of brand guidelines. Qualitative consumer research helps validate the brand proposition and pack design concepts with target consumers. Seven food, drink and horticulture companies participated in the SuperBrands service in 2023. This year more focus was placed on commercial marketing strategy as part of initial project scoping.

### Brand Forum

The Brand Forum works with client companies to build better brands. The programme offers customised branding workshops, bespoke quantitative research, recipe video & photography content service, speaker events and a podcast series. Brand Forum is supported by an industry steering group, which provides strategic advice and guidance, ensuring the programme of activity is relevant, timely and commercially pragmatic.

In 2023 Brand Forum activities focused on brand issues encountered in the marketplace, drawing on best-in-class expertise to demonstrate how to develop and drive brand growth.

The brand building workshops addressed topics including packaging design, marketing in the boardroom and social media marketing. The Biannual hybrid speaker events discussed and debated brand marketing themes with internationally acclaimed food & drink brand owners.

The annual Brand Health Check is a large-scale

on-line survey of grocery shoppers, designed to collect and analyse information to help brand owners understand key metrics for their brands vis-a-vis their competitors including: awareness, consideration, experience, equity, commitment and future brand potential. 2022 saw the largest number of participants with 60 brands researching 50 categories in the Irish market.

The recipe video and photography content service for Brand Forum members remained in high demand and delivered 56 recipe videos in multiple formats, plus photography assets content for client companies.

The Brand Forum podcast explores great ideas and stories from the world of food and drink. The episodes explore how businesses champion innovation, disrupt categories, activate change in consumer behaviour and in their way shift the future of food & drink.

The year concluded with the Brand Forum annual food and drink industry dinner with a keynote address from David McRedmond CEO An Post.

### Client capability

#### *Client Capability – Introduction*

The purpose of Bord Bia's capability service offer is to build the skills of client companies to manage the commercial marketing activities needed to create better customer value and drive growth. A range of supports are offered to client companies on a 1:1 and group basis that meet current and emerging industry needs and deliver lasting impact. In 2023, over 300 clients and 2,000 individuals participated at client capability workshops and webinars.

#### Commercial Marketing Strategy

In 2023, strategic marketing support was provided to clients from all sectors via bespoke and group-based accelerators and strategy development capability workshops. Several clients successfully completed the Kingdom of Saudi Arabia Accelerator programme, which included participation in a buyer-pitch meeting at the Dublin office. This initiative has led to an expansion of accounts for participating

companies and has provided invaluable market insights for future client endeavours in this region.

### Cost Inflation Supports & Negotiation

With the enduring impact of inflation and supply chain challenges in 2023, many food and drink companies continued to have challenging conversations with customers, often seeking to maintain the price increases secured in previous years. Bord Bia's client capability team delivered support to clients in this area with negotiation skills training throughout the year. 50 participants from close to 30 Bord Bia client companies participated in negotiation skills and fundamentals training group workshops over the course of 2023.

In addition, tailored advanced negotiation training was delivered - on a co-funded basis - to 3 client companies, allowing them to focus on the specific negotiation challenges they face, with 25 individuals participating in this bespoke training over the course of the year.

### Innovation

A successful pilot of Bord Bia's new innovation capability service concluded in 2023 with the host companies and participants of the Insight & Innovation Masters Programme. This support is focused on building understanding of innovation as a fundamental driver of business growth and competitiveness. It also includes an innovation capability health check for participants that identifies areas of focus for innovation improvement based on a comprehensive online survey. The rollout of this support to all clients began in January 2024 with a two-part workshop for 20 participants. Further workshops will be delivered over the course of the year.

### Digital Marketing (Think Digital)

The Bord Bia Think Digital programme continues to provide robust support to clients in developing their digital marketing strategies and tactics. In 2023, Bord Bia finalised the delivery of a new TikTok client support initiative, recognising the increasing significance of this channel for clients to engage with their consumers. This program has consistently been oversubscribed, and participants have been acknowledged for their success, receiving

recognition through a showcase on the TikTok EU Platform delivering international exposure. Additionally, 2023 witnessed a significant emphasis on assisting clients in achieving their B2B objectives. A new B2B Digital Playbook pilot was introduced, aimed at raising awareness and converting leads for our clients. Aligned with Bord Bia's Digital Transformation agenda, Bord Bia has developed 29 self-service digital tactic videos, scheduled for release in early 2024. These videos are intended to further empower clients in leveraging digital strategies effectively.

### Food Works

Food Works is Ireland's leading accelerator programme for high potential, innovative food and drink start-ups who are seeking investment in order to expand. The programme is run by Bord Bia, Enterprise Ireland and Teagasc. It aims to foster and encourage innovative product ideas from suitable companies which satisfy a genuine market need while supporting the growth of the Irish food industry on a global scale. In 2023, 8 companies completed the programme.

a start-up accelerator business programme run in conjunction with Enterprise Ireland and Teagasc. During the year a strategic review process was also completed. The objective was to review the first 11 years of the programme sense checking where it is now in relation to the needs of food and drink start-ups and how it may need to adapt for the future. Food Works was benchmarked against other similar international programmes. Industry experts were interviewed, and workshops completed. One output was to move the programme into the areas of Food Technology and Food Ingredients, while not neglecting those businesses with consumer products for both retail and food service. This influenced the recruitment strategy and resulted in the recruitment of 10 exciting new companies for 2024.

# MARKETING AND COMMUNICATIONS

## Bord Bia Communications

Bord Bia's communications remains focused on four key audiences – corporate stakeholders (including Irish media, industry, and Government), international media, Irish farmers, and Irish consumers.

In addition to operating a busy press office function, throughout 2023, the communications team continued to generate a high volume of earned media coverage at home and abroad. Prioritised initiatives included the launch of Bord Bia's annual Export Performance and Prospects report, Trade Missions to the US, China and South East Asia, Sustainable Farmer Awards, and Bord Bia Bloom, all of which the communications team promoted across the political, media and public arena.

Strategic corporate communications in 2023 included the launch of key insight and export reports, opening or resumption of trade in export markets, and responding to crises and / or reputational issues. Campaign activities included a focus on Origin Green developments, Bord Bia's first place position on Reprtrak (national reputational study), Bord Bia Talent Academy and supplier development programmes.

## International media

The international communications team achieved record breaking media coverage from the 2023 trade mission to Malaysia and the Philippines. Combined media reach in Malaysia and the Philippines amounted to over 134 million people via earned media coverage on TV, print and digital media.

Bord Bia CEO Jim O'Toole appeared on national television in the Philippines to an audience of 78 million people, highlighting Ireland's credentials as a partner and supplier of safe, high quality food and drink. Two Irish agri-media journalists from the Irish Farmers Journal and Agriland travelled with the Bord Bia

communications team on the trade mission, resulting in 30 positive media articles across online, print, regional and trade media in Ireland.

As part of building Bord Bia's CEO profile among key international trade audiences, an interview with Jim O'Toole appeared in USA Today, a leading US newspaper reaching over 2.5 million print readers. The supplement featuring the interview was published in spring, 2023. Jim O'Toole was featured alongside Dara Calleary, Minister for Trade Promotion, Digital and Company Regulation; Catherine Martin, Minister for Tourism, Culture, Arts, Gaeltacht, Sport and Media; and Eamon Ryan, Minister for Environment, Climate, Communications and Transport.

In September 2023, the dairy, international communications and markets teams worked together on a dairy Inward Journalist Visit (IJV) for three days with journalists from the UK and UAE. The purpose of the IJV was to highlight Irish farming systems and the rich heritage of Irish family farms along with the work Origin Green is doing on farm, and right through the supply chain with visits to farms and processors in Wexford, Tipperary and Cork. The trip was reported on in two publications from BBC Good Food and Hotel Catering News ME

## Farmer Communications

In 2023, significant earned media coverage was secured across key agri-media publications and a range of touch points were activated to reach farmers. These included direct communications, media partnerships, advertising, and farmer events. Bord Bia engaged with over 60,000 farmers through text messaging and newsletters.

In addition to this, agri-media partnerships helped Bord Bia to communicate to farmers on key topics such as Origin Green sustainability supports, global meat and dairy market insights and information on Bord Bia campaigns and initiatives. In-person events provided the ideal platform to directly engage with farmers on new initiatives. Bord Bia collaborated with Teagasc to showcase AgNav, a major new online sustainability platform, at the National Ploughing Championships. A number of agri-

food stakeholders partnered to launch a new Sustainable Livestock Village at the Tullamore Show.

### Consumer Communications

Following a six-month earned media campaign, Bord Bia Bloom 2023 secured over 1,000 media features and almost universally positive (95%+). Additional consumer campaign activities included a focus on Irish farmhouse cheese, organics, Best in Season fruit and vegetables and an always-on gardening campaign.

### Bord Bia Quality Mark Campaigns in the Irish market

The aim of the Bord Bia Quality Mark consumer marketing programme in the domestic market in 2023 was to continue to drive awareness and increase propensity to purchase quality assured lamb, pork, chicken, ham, bacon and eggs. This was achieved by communicating how the quality standards and independent auditing behind the Quality Mark enable shoppers to trust and, therefore, enjoy the food they consume. During 2023, these messages were integrated throughout all Quality Mark activities and across the specific marketing programmes for the various quality assured product categories.

Campaign activities were primarily focused on TV and radio advertising, PR, events and the development and circulation of new and fresh digital content. In all, 17 campaign bursts took place in 2023 including 27 weeks of TV, 23 weeks of radio advertising and 38 weeks on Social Media platforms Instagram, Facebook and TikTok.

In response to the combined challenges of rising energy and animal feed costs, 'The Power of your Food Choices' campaign continued in 2023 to further encourage Irish shoppers to buy quality assured food and, in doing so, support and secure the future of quality assured farmers and producers. Targeting 30 to 60-year-old grocery shoppers, the campaign consisted of radio, outdoor and social media advertising for three weeks in January 2023. A nationally representative

consumer survey indicated higher than average recall for the campaign, with 79% saying that it had a positive impact on their propensity to buy food with the Bord Bia Quality Mark.

By July 2023, consumer research indicated that 96% of Irish consumers were aware of the Bord Bia Quality Mark (+2% year on year) and 71% said that seeing it on a food product would make them more likely to buy it. The Quality Mark is also considered by Irish consumers to be the most reassuring mark in terms of food safety, quality and independent verification.

### Irish Seafood Campaigns in the Irish Market

In 2023, the focus in the domestic market continued to be to inspire consumers to tap into the versatility and appetite appeal of Irish whitefish (Irish hake and haddock) for their everyday and weekend meals. Targeting 35 to 55-year-old female shoppers, two bursts of TV, radio and social media advertising took place. A nationally representative consumer survey indicated that 62% of the target group could recall seeing the TV advert and of these, 64% said they would be more likely to buy Irish whitefish as a result.

In addition, a radio and social media campaign in April and May encouraged consumers to buy Irish crab meat and mackerel. In the run up to Christmas, further radio, public relations, and social media activities promoted Irish crab meat, Dublin Bay prawns, oysters, organic smoked salmon, monkfish and trout to shoppers.

### TV Sponsorships in the Irish Market

#### **Neven's Greenways Food Trails on RTE1:**

'Neven's Greenway Trails', a six-part TV series, was broadcast on RTE 1 in January 2023. During the series well known chef Neven Maguire met food producers, farmers, and restaurateurs along six of Ireland's popular Greenways in Waterford, Mayo, Kerry, Limerick, Connemara and the Royal Canal. During the series Neven demonstrated how to cook inspiring recipes using quality assured products and Irish seafood. The 2023 series attracted over 1.2 million viewers, with an average of 195,000 viewers per episode.

### **Neven's Christmas at Adare Manor on RTE1:**

This two-part Christmas special broadcast on RTE 1 on December 7th and 14<sup>th</sup> featured Neven Maguire preparing a variety of delicious Christmas recipes using Irish seafood and Bord Bia quality assured food. Approximately 240,000 people tuned in to each episode.

### **Bord Bia Bloom 2023**

In 2023, Bord Bia Bloom celebrated its 17th year. Bloom 2023 attracted over 100,000 visitors including garden enthusiasts, food lovers and young families. The festival was opened by the President of Ireland and Bloom Patron, Michael D Higgins as per previous years.

Visitor research following Bord Bia Bloom 2023 showed the positive sentiment with 94% of visitors saying they would return in 2024 and 90% of them considering it a highly sustainable event.

Bord Bia Bloom's purpose is to motivate people to embrace, experience and advocate for Irish horticulture, food and drink as part of a sustainable lifestyle, cultivating fans for life. This is done through inspiring, educating and empowering visitors through show gardens and horticulture content, to the excellent food and drink offering across the site, as well as the expert garden and sustainable living stage and kids zone area. With over 50 events taking place within the festival, there is much to see and do and something for everyone.

### **International and Global Marketing**

Investment in Food Brand Ireland continued with a central/local agency network supporting Bord Bia's central marketing team and local offices through TV broadcast, radio, print, digital media and events. B2B and B2C channels were optimised for a global campaign, *Ireland – Working with Nature Like nowhere Else in the World*. The strategic positioning of priority sectors in priority markets continued with a B2C emphasis on the Irish beef brand in Europe and the Irish seafood brand in France and Germany. B2B Campaigns across beef, dairy, seafood and drinks covered Europe and

Asia, raising the awareness of Ireland as a source of sustainable food and drink among our target audience to an all-time high. EU Campaigns were strategically instrumental in positioning Europe, and Ireland as part of Europe, in the distant territories of Japan, Korea, Mexico and China as a source of food and drink, paving the way for future brand building plans in those key territories in 2023.

Food Brand Ireland, powered by the Origin Green strategic communications framework, guided best practice central/local brand campaign and communications deployment across the world, bringing consistency and cohesion to marketing in 2022.

### **Trade Events**

Bord Bia attended 15 trade fairs in Europe including Sirha (Meat) Biofach (Organics), Internorga (PCF), Prowein Europe (Drinks), ISM (PCF), Food and Drink Expo (PCF), SEG Barcelona (Seafood), Tuttofood (Meat), PLMA (PCF), IMBIBE (Drinks), Le Mondial du Fromage (Farmhouse Cheese) Conxemar (Seafood), Anuga (Meat, Dairy and PCF), Natexpo (Organics), Food Ingredients Europe (Dairy Ingredients).

Other trade shows included Gulfood Dubai, Annual Meat Conference (Meat), NABCA (drinks) and WSWA (drinks) in the US, and Foodex, CIMIE, SIAL China, Seoul Food, World Seafood Shanghai, Food Ingredients Asia and China Fisheries

In total over the course of 2023, Bord Bia supported over 171 clients to attend 27 trade fairs enabling the delivery of business development and reputation marketing opportunities for exporting Irish food, drink and horticulture to trade buyers across all our primary target markets.

### **International Business to Business (B2B and B2C) Campaigns for Beef, Pork, Dairy, Seafood and Alcohol**

The Bord Bia Marketing Team led B2B and B2C campaigns for Irish beef, pork, dairy, seafood and drinks in ten priority markets in 2023. Targeting key retail, foodservice and manufacturing trade customers, the campaigns

drove preference for high quality, sustainably produced Irish food and drink in established markets (EU, US) and awareness of their distinctiveness in Asian markets. Campaigns took place in the UK, France, Germany, Italy, Spain, Portugal, North America, China, Japan and South Korea.

### **Dairy Sector**

For Irish dairy, B2B campaigns took place across five priority markets: Germany, UK, USA, China and Japan. The objectives of the campaigns in Germany and the US were to retain existing business by continuing to drive preference for Irish dairy among trade customers based on its premium quality and grass-fed credentials. In the UK, the objective was also to drive incremental growth through existing trade customers. The timings of the campaigns were aligned with key trade shows where relevant.

In Germany, dairy B2B marketing and communications activity featured trade print adverts, advertorials and digital advertising in key trade publications and on relevant trade digital websites. Post campaign research among German dairy trade buyers indicated that 86% of them recalled the advertising campaign.

In the USA, the dairy B2B campaign launched across three leading grocery and dairy-focused publications: The Dairy Reporter, Supermarket News and The Progressive Grocer. The campaign featured paid content on the publication websites and in newsletters sent to subscribers.

In China and Japan, the B2B campaigns continued to drive awareness and understanding of Ireland as a source of high quality, sustainably produced dairy products among target trade customers.

In Japan the campaigns featured print advertising in key trade publications relevant to the target audience, digital advertising across the trade websites and email advertising throughout the year. In addition, editorial coverage delivered additional earned reach.

In China, the communications strategy focused on the continuous promotion of the unique selling points of Irish dairy by communicating its grass-fed credentials, R&D capability and foodservice applications to the target trade audience. Marketing activities included paid advertising, generating media coverage in business and trade media publications, disseminating content regularly on the Bord Bia owned social media platforms (WeChat and Weibo) and partnerships with relevant trade KOL platforms. These activities were aligned with and supported specific physical trade events such as Irish dairy at Sial, dairy seminars in Hangzhou and aligned with important events in the Chinese calendar such as Chinese New Year.

### **Beef Sector**

For Irish beef, B2B campaigns took place across four priority markets: Italy, Germany, China and Japan. The objectives of the campaigns in Italy and Germany were to drive preference for Irish beef among trade customers by communicating its premium quality and grass-fed credentials. In both markets, the marketing and communications activity was focused on trade press advertising, advertorials and digital advertising in key trade publications and on relevant trade digital websites.

In Italy PR activities included 24 press releases, 10 media interviews, two media events and one press trip. These activities generated 270 articles in trade print publications.

In Japan, the objective of the B2B campaign was to drive awareness of Ireland as a source of premium quality Irish beef among importers and foodservice targets. The campaign featured print advertising in key trade publications relevant to the target audience, digital advertising across the trade publication websites and email advertising. In addition, earned editorial coverage to coincide with the advertising provided more detail on the benefits of sourcing Irish beef.

In China, to coincide with the renewed access of Irish beef to the market, a communications

programme was designed to highlight its availability and benefits to traders/importers, foodservice and retail customers. Throughout the year there were various marketing activities including trade seminars, chef competitions, and cross sector food service promotions with key hotel groups. These activities were amplified online through trade media, trade KOLs and across the Bord Bia owned social media platforms (WeChat and Weibo).

### **Pork Sector – China**

In terms of Irish pork, the focus was on strengthening the understanding of its benefits and applications among foodservice customers and chefs. This was achieved through ongoing social media content posting on Bord Bia owned platforms and through initiatives such as Pork Wuxi Restaurant promotion and the Pork promotion with Mingchu, an online platform where chefs created recipes with Irish pork

### **Seafood Sector**

For Irish seafood, B2C campaigns took place across four priority established markets (France, Germany, Spain and Portugal) aimed at driving awareness and preference of Irish seafood among consumers based on its unique selling points.

Campaigns ran in France and Germany promoting Irish organic salmon using geo-targeting in both markets for greater effectiveness. In France areas included Brittany, Paris and Lille and in Germany, Rhineland-Palatinate, Lower Saxony, Hamburg and Bremen. Advertising in France ran across digital channels throughout July, to coincide with higher supply levels at that time.

In Germany, Irish organic salmon was also promoted in Q2, with digital advertising across a range of online media channels.

Following the first inshore species campaigns in France and Spain in 2022, the activity ran again for six weeks during September/October, and was expanded in 2023 to include Portugal. Focusing on six key species ie brown crab, whelks, spider crab, lobster, velvet crab and shrimp, the campaign targeted higher income seafood consumers and ran across digital and

social media channels, utilising newly created species specific videos.

In China, the overall B2B objective continued to drive trade awareness and understanding of Ireland as a source of high quality, sustainably produced food and the unique benefits of Irish seafood. Targeting key foodservice customers, importers, traders and online retailers, activities were centred on a series of trade events which were further amplified through relevant business and trade media channels, online trade influencers and through Bord Bia owned digital channels (WeChat and Weibo).

A key focus for activity was the Trade Mission in May, with a Master Chef seafood showcase to which key Chinese trade media and KOLs were invited. Other primary events were the Trade Seminar associated with China Fisheries Seafood Exhibition, which included a TV interview with Bord Bia Manager Conor O'Sullivan on Shanghai City TV.

In Japan, the B2B objective was to drive awareness and understanding of Ireland as a source of high quality, premium seafood among potential trade buyers. Campaign activation included print and digital advertising.

B2B seafood campaigns in South Korea ran in Q2 and Q4, in both print and online editions of nine key trade media with a total of 64 seafood advertorials published during the campaign periods. Direct marketing activation took place at the Seoul Food Show in early June and again at Food Trends Seminar 2024 in December.

### **Alcohol Sector**

The emphasis for 2023 continued on the rollout of the Spirit of Ireland (SOI) educational programme to retail and on-trade channels, which aims to encourage frontline staff to recommend Irish Whiskey to their customers. A total of 18 SOI programmes were delivered across the USA, Europe, India, Nigeria and South Africa.

Marketing campaigns supporting the sector ran in the USA from February to June and again from October to December, across print and digital channels.



In China, the Annual Whiskey reception, in conjunction with St. Patrick's Day again presented the opportunity to further promote the USPs of Irish Whiskey. This was followed by a whiskey masterclass held in Shanghai as part of the Trade Mission. The year concluded with an Irish Whiskey Trade Gathering in Shenzhen in December.

### Organic Campaign

The first phase of the Irish consumer organic campaign 'Go a little Mor- organic' kicked off in November. The campaign aimed to increase awareness and understanding of the benefits and availability of the range of Irish certified organic food among 25-44 year old male and female shoppers through national and local radio advertising, outdoor advertising and a range of social media activities.

Post campaign research indicates the adverts performed strongly in driving purchasing behaviour, with over four in ten respondents claiming they bought organic Irish food and drinks on at least one occasion as a direct result of the campaign.

### Employer Brand Campaign

This campaign encouraged ambitious professionals from relevant industries to consider Bord Bia as a future employer through advertising on Meta and LinkedIn. It generated significant interest in Bord Bia as a whole and for specific vacancies being advertised.

### Digital Transformation for a Marketing Agency

In 2023, following the development of a three-year Digital Strategy in 2021, work continued on delivery of key digital and ICT workstreams, focusing on enhancing and optimising platforms, processes and skills. The roadmap forms a strategically important part of Bord Bia's overall Corporate Strategy. Key deliverables in 2023 included:

The strategic development and launch of the My Bord Bia portal. After considerable research, design and development, an evolved personalised portal was launched for client

companies. Informed by client account information, the portal provides custom and curated content to clients based on their sector and stage of development. The user-friendly interface enables client to access relevant business supports at any time. It also enables Bord Bia to review the usage of content, providing key insights into client preferences.

Salesforce Marketing Cloud: We continued to embed Salesforce Marketing Cloud tools across the organisation. A key area of focus was in the integration of CRM and Marketing Cloud, enabling alignment between the two platforms, and allowing us to build automations using email marketing. Another key area of focus was testing the use of first party data targeting using Advertising Studio, which was initially tested on campaigns.

Website content: Bord Bia continued to publish new content across our platforms to meet the needs of our target audiences. A new content hub for organic produce was developed on the bordbia.ie website, educating and informing consumers about the benefits of organic through content, recipes and other features. This content hub was designed to align to our B2C campaign, under the theme of "More-Ganic".

Bloom website enhancements: Enhancement were implemented on the Bord Bia Bloom website to provide a better user experience for visitors. One key area was the development of a new event schedule, where users could easily browse all activations taking place over the 5 days in one place, and curate their own calendar. An interactive map of the site was also developed, to help with wayfinding at the event and reduce the printed map requirements.

Web Accessibility: We continued to better optimise our platforms to meet AA standards, through rolling out design updates across 2 additional websites. We also put a huge focus on training across the organisation, and increasing the number of tools available to assist employees to ensure that our content meets accessibility standards.

Social media: 2023 was a year of growth on Bord Bia corporate social media channels on

LinkedIn and X (formerly Twitter) with a focus on best-in-class content. Consumer social channels are also growing in line with shaping consumer demand.

# MARKETING FINANCE

In 2023, Bord Bia invited applications under the Marketing Assistance Programme (MAP) for grants to support marketing activities. The MAP plays a role in enhancing the marketing capability of small and medium sized companies, helping them take the next step in their growth progression and enabling them to become export ready. The MAP was open to Irish food, drink and horticulture producers with a turnover between €100,000 and €3.5 million. 118 companies were approved grant assistance for a total of €1,057,500.

In terms of payments, grants totalling €889,795 were paid to 103 companies during the year, The list of companies in receipt of grant payments is noted at the end of this report.

## **Sponsorships**

During 2023, Bord Bia sponsored categories at a number of award programmes. The awards supported included the food and drink category of the Small Firms Association, the Supreme Champion category at the Blás na hEireann awards, as well as the Food Writing Award category at the Irish Food Writing awards. Support was already provided towards the Food on the Edge conference.

# INTERNATIONAL OFFICES

## Global Business Development

In 2023, Bord Bia remained committed to improving services for client companies across its international network of 14 overseas locations, including eight in Europe and six international markets. A key emphasis remained on providing on-the-ground support for client companies in overseas markets through network building, on the ground insights and commercial introductions. Bord Bia also played a key role, enhancing Ireland's global reputation for sustainably produced, high-quality food and drink products. Despite challenges stemming from persistently high inflationary costs and reduced consumer spending, Bord Bia remained adaptive in its supports to client companies.

The sector and channel priorities of each market informed the activities carried out, however the overarching aim remained consistent; to build the awareness and reputation of Irish food and drink suppliers globally, support their market readiness, and connect them with the best customers around the world.

Throughout 2023, Bord Bia worked closely with Irish companies, supporting them in evaluating, planning and achieving growth in key priority markets. Emphasis was increasingly placed on fostering strategic customer partnerships across retail, foodservice, and manufacturing channels.

In addition to a wide range of programmes and projects, Bord Bia's Global Business Development team undertook the following throughout the course of 2023:

- Delivered three trade missions to China, West Africa and Southeast Asia.
- Exhibited at over 25 Trade Shows in Europe, the UK and in Asia and Middle East.
- Facilitated 1,578 meetings with key commercial stakeholders.

- Created 1,778 commercial opportunities for Bord Bia client companies.
- Facilitated a market access audit and inspection with key stakeholders from Mexico, while laying the foundations for future market access visits in 2024.

## A Collaborative Approach

Bord Bia continues to work in partnership with key government departments, agencies and associations in the development and implementation of support for the food and drink industry. These include the Department of Agriculture, Food and the Marine, the Department of Foreign Affairs, Enterprise Ireland and Tourism Ireland.

# Governance

## Governance Statement and Board Members Report

### CORPORATE GOVERNANCE

Bord Bia was established under the Bord Bia Act 1994 and operates in accordance with the provisions of the Bord Bia Acts 1994 to 2004 and under the aegis of the Minister for Agriculture, Food and the Marine.

### BOARD STRUCTURES

Bord Bia comprises the Board, five Subsidiary Boards, the Chief Executive and the Executive, and provides a range of services to implement Board policy and programmes. The Board provides the appropriate balance of skills and experience to support the strategy of Bord Bia. The Board comprises a Chair and up to fourteen ordinary members appointed by the Minister for Agriculture, Food and the Marine. All new Board members receive financial and other information about Bord Bia, and the role of the Board and the Board committees. The roles of the Chair and Chief Executive are separate.

There are five Subsidiary Boards (Consumer Foods, Dairy, Horticulture, Meat and Livestock, and Quality Assurance) comprising a Chair and up to twelve ordinary members, who are appointed by the Board with the consent of the Minister for Agriculture, Food and the Marine. The Chair of each Subsidiary Board is a member of the Board.

## BOARD RESPONSIBILITIES

Section 21 of An Bord Bia Act 1994 requires the Board to “keep in such form and in respect of such accounting periods as may be approved by the Minister, with the consent of the Minister for Public Expenditure and Reform, all proper and usual accounts of monies received or expended by it, including a Statement of Income and Expenditure and Retained Revenue Reserves, a Statement of Comprehensive Income, a Statement of Cash Flow and a Statement of Financial Position and, in particular, shall keep in such form as aforesaid all such special accounts as the Minister may, or at the request of the Minister for Public Expenditure and Reform shall, from time to time direct and the Board shall ensure that separate accounts shall be kept and presented to the Board by any Subsidiary Board that may be established by the Board under this Act and these accounts shall be incorporated in the general statement of account of the Board.”

In preparing the financial statements the Board is required to:

1. Select suitable accounting policies and then apply them consistently;
2. Make judgements and estimates that are reasonable and prudent;
3. Prepare the financial statements on a going concern basis unless it is inappropriate to presume that Bord Bia will continue in existence for the foreseeable future; and,
4. State whether applicable accounting standards have been complied with, subject to any material departures disclosed and explained in the financial statements.

The Board is responsible for keeping adequate accounting records, which disclose, with reasonable accuracy at any time, the financial position of Bord Bia. The Board is also responsible for safeguarding assets of the organisation and hence for taking reasonable steps for the prevention and detection of fraud or other irregularities.

The Board meets regularly, normally seven times a year, and is responsible for the proper

management of Bord Bia. It takes the major strategic decisions and retains full and effective control while providing executive management with sufficient flexibility to run the business efficiently and effectively within a centralised reporting framework. Standing agenda items at Board meetings include minutes of previous meeting, matters arising, finance report, Chief Executive’s report, corporate governance and risk management and any other business. The Chair addresses any conflicts of interest members may have with the agenda at the start of each meeting.

The Board carries out an ongoing assessment of principle risks and has established a context for identifying, analysing, evaluating, treating and monitoring risk. Principal risks identified include the risk of not appropriately prioritising work plans for the achievement of objectives; not achieving industry commitments to the development and implementation of Origin Green; reputational risks associated with the misuse of Bord Bia’s main brands and marks; reputational risks associated with food quality and safety; risks to quality assurance schemes funding and various industry sources of funding; etc. Risk is mitigated through a comprehensive system of risk management in the organisation, including review of the risk register at each Board meeting. Industry consultations are facilitated through the Subsidiary Board structure.

The Board complies with the relevant aspects of the Public Spending Code and matters reserved for the Board for decision, and not delegated to management, include approval of, inter alia, significant acquisitions, major investments, major disposals, major contracts, annual budgets and strategic plans, annual reports and financial statements, staffing, delegated authority levels, treasury and risk policy. Approval of the Minister for Agriculture, Food and the Marine is required for material acquisition or disposal of land, buildings or other material assets. Approval of the Minister for Agriculture, Food and the Marine, together with the consent of the Minister for Public Expenditure and Reform is required for any intended action which would extend or change significantly the nature, scope or scale of the activities of Bord Bia.

Within the context of the Food Vision 2030 strategy for the agri-food sector, the Bord Bia corporate strategy 'Nurturing a Thriving Future' sets out the objectives and direction proposed for the organisation during the period of the strategy, 2022 – 2025. The annual budgets and activities for Bord Bia are aligned to this strategy. The Board approves annual budgets and the evaluations of actual performance against budget. This Annual Report provides a comprehensive review of the activities of Bord Bia during the year.

The Board considers that the financial statements present a true and fair view of Bord Bia's financial performance and its financial position at the end of the year.

## GOVERNANCE

The Board is committed to maintaining the highest standards of corporate governance and best practice and has adopted the Code of Practice for the Governance of State Bodies. The provisions of the Code are being implemented. The Board has adopted Terms of Reference which sets out the legislative framework; general and particular functions; membership; fiduciary duties; authority; role of the secretary; reporting responsibilities; scheduling of meetings; procedures for decisions between Board meetings and for dealing with conflicts of interest, and, a formal schedule of matters specifically reserved to the Board for decision. The Board reviews the Terms of Reference of the Board, Subsidiary Boards and Committees on an annual basis. During 2023, the Board held two meetings without the executive present. For the purposes of applying the Code of Practice for the Governance of State Bodies, Bord Bia is regarded as a non-commercial State Body.

The Chair:

- Leads the Board and ensures its effectiveness and high standards of integrity and probity regarding culture, values, and behaviours for Bord Bia and for the tone of discussions at Board early level.
- Together with the CEO, ensures the effective management of the Board's

agenda providing adequate time for discussion and deliberation. A culture of openness facilitates effective dialogue and contributions from both the executive, who attend all or part of Board meetings, and Board members.

- Ensures relevant reports and papers, finance, CEO report, reports from Subsidiary Boards and Committees and detailed updates on the progress and implementation of the annual budget and strategic plan, where appropriate, are circulated in a timely manner to Board members.
- In consultation with the Secretary ensures all relevant governance information is made available to the Board and its Committees and that there are good information flows between the Board, Subsidiary Boards and Committees in addition to facilitating induction, mentoring and assisting with ongoing professional development.
- Ensures there is a clear division of responsibilities between leading and managing the Board and the executive responsible for running Bord Bia.
- Keeps the Minister for Agriculture, Food and the Marine advised of matters arising in respect of Bord Bia.
- Submits a comprehensive report to the Minister in accordance with the Code of Practice for the Governance of State Bodies.

The Board undertook a self-assessment evaluation of its own performance during the year. Each Board member was asked to individually score the assessment, and answers were considered by the Chair and presented to the Board where a number of actions were identified to improve the performance of the Board. An external evaluation of the Board took place in 2022 and was presented to the Board in 2023.

Due to changes in membership of the Audit and Risk Committee towards the end of 2023, the self-assessment evaluation for that year was postponed until early 2024.

The Board provides strategic guidance,

monitors the activities and effectiveness of management and monitors compliance on an ongoing basis ensuring relevant legislation, regulations and guidelines are complied with.

An Oversight Agreement for Bord Bia has been completed and implemented by the Department of Agriculture, Food and the Marine during the year.

## BOARD MEMBERS AND INDEPENDENCE

All Board members have access to advice and services of the Secretary/Director Corporate Services who is responsible to the Board for ensuring that Board procedures are followed, and applicable rules and regulations are complied with.

Bord Bia's professional advisors are available for consultation by Board members as required. Individual Board members may take independent professional advice if necessary.

## COMPOSITION OF THE BOARD

Details of the current membership of the Board of Bord Bia is set out on page 73.

## BOARD MEMBERS AND MEETING ATTENDANCE

There were seven board meetings held during 2023 and the details of each member's attendance, is set out below.

Board Member	Board Meetings Attended
L. Allen	6 of 7
N. Browne	7 of 7
S. Buckley	3 of 3
M. Cronin	7 of 7
T. Cullinan	7 of 7
M. Delaney	3 of 3
P. Fitzgerald	7 of 7
C. Hayes	1 of 1
T. Keohane	2 of 3
K. Kerrigan	7 of 7
P. McCormack	5 of 7
S. McPhillips	4 of 4
D. MacSweeney	7 of 7
T. Moran	3 of 3
C. Murphy	1 of 1
P. Murphy	7 of 7
K. Pierce	3 of 3
J. Woulfe	6 of 7

## BOARD MEMBERS FEES AND EXPENSES

A schedule of the fees and travel and subsistence expenses paid to board members in respect of attendance at meetings of the Board, and where relevant, meetings of the subsidiary boards and board committees, in 2023 is set out below.

Board Member	Board Fees	Travel & Subsistence Expenses
D. MacSweeney	€20,520	€4,095
L. Allen	€11,970	€288
N. Browne*	-	-
S. Buckley*	-	-
M. Cronin*	€11,970	€4,995
T. Cullinan	€11,970	€98
M. Delaney	€5,887	€139
P. Fitzgerald	€11,970	€1,119
C. Hayes**	-	-
T. Keohane*	€5,486	-
K. Kerrigan	€11,970	€788
P. McCormack	€11,970	€837
S. McPhillips **	-	-
T. Moran	€5,486	€66
C. Murphy	€1,529	-
P. Murphy *	-	-
K. Pierce**	-	€230
J. Woulfe	€11,970	€1,618

\* Indicates those Board members who have waived part or all of the fee or expenses payable, as a Board member in 2023.

\*\* Under the one person one salary principle, no fees were payable to K. Pierce, S. McPhillips or C. Hayes.

Amounts paid to subsidiary board members for travel and subsistence expenses in 2023 amounted to €11,940. No fees were paid to subsidiary board members in 2023 in relation to attendance at subsidiary board meetings.

## THE ROLES OF THE CHAIR AND THE CHIEF EXECUTIVE

The Chair leads the Board in the determination of its strategy and in the achievement of its objectives. The Chair is responsible for organising the business of the Board, ensuring its effectiveness and setting its agenda. The Chair facilitates the effective contribution of all



Board members and constructive relations between the executive and Board members, ensuring that Board members receive relevant, accurate and timely information.

The Chief Executive has direct charge of Bord Bia on a day-to-day basis and is accountable to the Board for Bord Bia's financial and operational performance.

## BOARD COMMITTEES

The Audit and Risk Committee currently comprises three members of the Board, M. Cronin, S. Buckley and C. Hayes and one external member with a financial background, R. Nolan. This committee met on four occasions in 2023.

The Audit and Risk Committee is responsible for maintaining an appropriate relationship with the external auditors and for reviewing Bord Bia's internal audit resources, internal controls and the audit process. It aids the Board in seeking to ensure that the financial and non-financial information presents a balanced assessment of Bord Bia's position. The Internal Auditor and the External Auditor have full and unrestricted access to the Audit and Risk Committee. The Audit and Risk Committee carries out a self-assessment each year, and resulting actions and recommendations are implemented.

The Remuneration and Pensions Committee, which currently comprises four members of the Board, [L. Murrin], M. Cronin, M. Delaney and C. Hayes, met on one occasion in 2023. The Remuneration and Pensions Committee determines on behalf of the Board the appointment, remuneration and assessment of the performance of, and succession planning for, the Chief Executive.

There were three meetings of the Strategy Committee during the year. The Strategy Committee currently comprises six members of the Board, [L. Murrin], L. Allen, N. Browne, P. Fitzgerald, C. Hayes, and P. Murphy. The Strategy Committee plays an important role in providing observations and recommendations concerning strategic issues facing Bord Bia and contributes to the strategic planning

process and the development of strategy.

The Bord Bia Statement of Strategy 2022 – 2025, launched in January 2022, is aligned to Food Vision 2030, and comprises the following five strategic focus areas:

- Build Food Brand Ireland and further develop its proof points.
- Better ways for clients and customers to connect and build partnerships.
- Nurture industry talent and foster client capability.
- Champion insight-led innovation and brand development
- Support and enable the organisation and its stakeholders to execute strategy.

## GENDER BALANCE IN THE MEMBERSHIP OF THE BOARD

As at 31 December 2023, the Board had 6 (40%) female board members and 9 (60%) male board members, with no positions vacant. The Board therefore meets the Government target of a minimum 40% representation of each gender in the membership of State Boards.

The Board of Bord Bia are strongly committed to achieving and maintaining gender balance among its membership, in line with Government policy. The question of gender balance on the Board of Bord Bia is addressed by:

- Considering the skills and expertise gaps, together with the current Board make up when filling vacant positions, taking such opportunities to further strengthen and balance the Board.
- Prioritising sought after skills and industry expertise when filling vacant positions, putting less emphasis on prior board experience.
- Leading, together with AON and in collaboration with the 30% Club, the Agri-food Diversity and Inclusion Forum, (Ag-Dif) whose purpose to advance the D&I agenda in the Irish agri-food industry, with a current focus on gender balance.

It may be noted that the An Bord Bia Act, as amended, sets out that certain specific sectors and skill sets are represented on the Board.

Where a vacancy arises in such cases, in order to ensure that the requirements of the Act are met, the relevant skill set, and experience of an individual applicant must take precedence in the appointment process.

## **ETHICS IN PUBLIC OFFICE**

The provisions of the Ethics in Public Office Act 1995 and the Standards in Public Office Act 2001 have been implemented. Board members and staff members holding designated positions furnish statements of interests on appointment and each year to the Secretary.

## **FREEDOM OF INFORMATION**

Bord Bia is a prescribed organisation under the Freedom of Information Act 2014. The Freedom of Information Act establishes three statutory rights:

- A legal right for each person to access information held by public bodies;
- A legal right for each person to have official information held by a public body, relating to him/herself, amended where it is incomplete, incorrect, or misleading;
- A legal right to obtain reasons for decisions affecting oneself taken by a public body.

In addition to the requirements of the Freedom of Information Acts, the Data Protection Acts 1988 to 2019 and the General Data Protection Regulation (GDPR) (EU) 2016 also apply to Bord Bia. The Data Protection Acts protect the privacy of individuals whose personal data is being processed. Personal data is information relating to a living individual who can be identified from the data itself or in conjunction with other information held.

## **EQUALITY, DIVERSITY and INCLUSION**

Bord Bia is wholeheartedly committed to equal opportunity employment, and all employment decisions are based on merit, qualifications and abilities. The organisation's recruitment policy reflects the belief that diversity in all areas, including gender expression, cultural, generational, language and national backgrounds is necessary to achieve strategic objectives in domestic and global markets.

In consultation with staff, an enhanced equality, diversity and inclusion (EDI) policy has been developed for Bord Bia, building on previous work in this area. This new policy was approved by Bord Bia's Senior Leadership Team and launched within the organisation. The policy is accompanied by an action plan which sets out progress to date in the area of EDI, together with plans for initiatives and change in the current year. One aim of the policy is to create an environment in which all employees are respected and have the opportunity to participate in and develop within the organisation. The policy ensures that Bord Bia's statutory equality duties as outlined in the Employment Equality Acts 1998–2015 (as amended) and the Equal Status Act 2000 (as amended) are met.

Bord Bia is committed to ensuring equality of opportunity and that no staff member or applicant for employment receives less favourable treatment than any other on grounds of gender, marital status, family status, sexual orientation, religious beliefs, age, disability, race and membership of the Traveller community. Personnel and staff development programmes are structured accordingly.

Bord Bia endeavours to assist staff in relation to career and personal needs and operates appropriate policies covering such areas as professional development, study leave, flexible working and career breaks. Bord Bia is also committed to implementing government policy in relation to the employment of persons with disabilities in the public sector. There is a policy on sexual harassment in operation to support and protect the dignity of each person.

Provisions were made for staff and visitors with physical disabilities in the design and fit-out of Bord Bia's Global Hub, completed in 2022.

## **PROTECTED DISCLOSURES ACT 2014**

There were no protected disclosures made to Bord Bia during 2023.

## SAFETY, HEALTH AND WELFARE AT WORK

Bord Bia is implementing the provisions of Safety, Health and Welfare at Work legislation, including the preparation and operation of a Safety Statement embracing all matters affecting safety, health and welfare of staff and visitors to Bord Bia's premises.

## SERVICE CHARTER

Bord Bia's Service Charter sets out its commitment to the Principles of Quality Customer Service for Customers and Clients of the Public Sector. The Charter is supported by an Action Plan and appropriate internal procedures to give practical effect to this commitment. The charter can be accessed on Bord Bia's website.

## ENERGY EFFICIENCY AND CONSERVATION

Bord Bia is committed to making every effort possible to be energy efficient and to operating appropriate energy conservation and management measures. Light and heat, supplied by electricity, are the main areas of energy use in Bord Bia. Annual energy usage has been reduced significantly since commencing a review of energy usage. Usage within Bord Bia's main office is as follows:

<b>2023</b>	
KWH of electricity	<u>341,285</u>

Electrical usage is monitored along with the identification of wastage, inefficiencies and cost-effective initiatives to further improve energy performance.

## PROMPT PAYMENTS

In accordance with the provisions of the Prompt Payment of Accounts Act 1997, as amended by the European Communities (Late Payment in Commercial Transactions) Regulations 2002, Bord Bia is committed to ensuring that all suppliers are paid promptly. During 2023, 97% of payments were made within 15 days.

## EUROPEAN UNION FUNDING

Bord Bia administers a number of marketing and promotion campaigns eligible for co-

funding by the European Union including those for beef and lamb, dairy, fresh produce, potatoes, and mushrooms.

## OFFICIAL LANGUAGES ACT 2003 and the OFFICIAL LANGUAGES (AMENDMENT) ACT 2021

Bord Bia comes under the remit of the Official Languages Act 2003 and the Official Languages (Amendment) Act 2021 (the Acts) to provide a statutory framework for the delivery of services through the Irish language. In accordance with the Acts, this Annual Report is published in both Irish and English languages.

## CONSULTANCY COSTS

Consultancy Costs include the cost of external advice to management and exclude outsourced 'business as usual' functions.

	<b>2023</b>	<b>2022</b>
	<b>€'000</b>	<b>€'000</b>
Legal	106	91
Tax & Financial Advisory	95	94
Public Relations / Marketing	0	0
Pensions & Human Resources	199	224
Business Improvement	160	129
Other	327	140
Total Consultancy Costs	<u>887</u>	<u>678</u>
Consultancy Costs Capitalised	327	140
Consultancy costs charged to Income and Expenditure and Retained Revenue Reserves	560	538
Total	<u>887</u>	<u>678</u>

## LEGAL COSTS AND SETTLEMENTS

The table below provides a breakdown of amounts recognised as expenditure in the reporting period in relation to legal consultancy costs, settlements and conciliation and arbitration proceedings. The below figures include expenditure incurred in relation to general legal advice received by Bord Bia which is disclosed in Consultancy costs above.

	<b>2023</b>	<b>2022</b>
	<b>€'000</b>	<b>€'000</b>
Legal Fees – Legal	106	91
Consultancy	-	-
Conciliation & Arbitration		
Payments	-	-
Settlements	137	-
<b>Total Legal Costs</b>	<b>243</b>	<b>91</b>

## TRAVEL AND SUBSISTENCE EXPENDITURE

Travel and subsistence expenditure is categorised as follows:

	<b>2023</b>	<b>2022</b>
	<b>€'000</b>	<b>€'000</b>
Domestic		
- Boards	26	18
- Employees	297	244
International		
- Boards	-	-
- Employees	1,050	974
<b>Total Travel &amp; Subsistence Costs</b>	<b>1,373</b>	<b>1,236</b>

## HOSPITALITY

The Income and Expenditure account includes the following hospitality Expenditure:

	<b>2023</b>	<b>2022</b>
	<b>€'000</b>	<b>€'000</b>
Staff hospitality	8	8
Client hospitality	-	-
<b>Total hospitality Costs</b>	<b>8</b>	<b>8</b>

## STATEMENT OF COMPLIANCE

The Board has adopted the updated Code of Practice for the Governance of State Bodies 2016 and has put procedures in place to ensure compliance with the Code. Bord Bia was in full compliance with the Code of Practice for the Governance of State Bodies during 2023.

Larry Murrin  
Chair (designate)

# Organisation Structure

Bord Bia is comprised of the Board, five Subsidiary Boards, the Chief Executive and the Executive, which provide a range of services required to implement Board policy and programmes.

The Board is comprised of a Chair and 14 ordinary members appointed by the Minister for Agriculture, Food and the Marine. There are five Subsidiary Boards (Meat and Livestock, Consumer Foods, Dairy, Quality Assurance and Horticulture) comprised of a Chair and 12 ordinary members who are appointed by the Board with the consent of the Minister. The Chair of each Subsidiary Board is a member of the Board.

The following Board Committees are in place: Audit and Risk Committee, Remuneration and Pensions Committee, and Strategy Committee.

The Executive is comprised of staff based in the Board's head office and overseas.

## **General Information**

### **Head Office:**

140 Pembroke Road, Dublin 4, D04 NV34.

### **Auditors:**

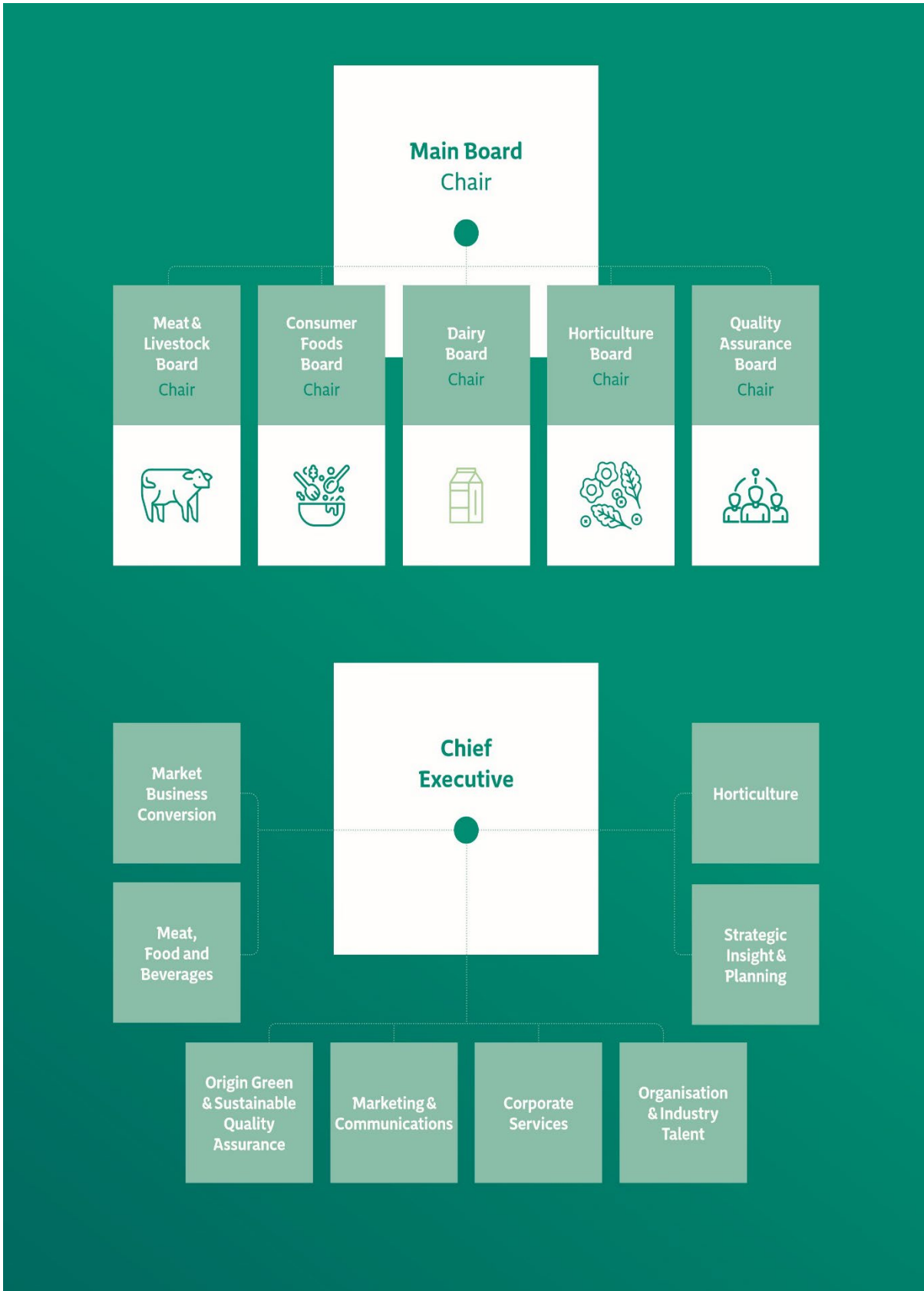
Comptroller and Auditor General

### **Bankers:**

Allied Irish Banks

### **Solicitors:**

Philip Lee Solicitors



# STAFF STRUCTURE

Chief Executive	Jim O'Toole
Strategic Insights	Nick Curtis Davis
Marketing and Communications	Una Fitzgibbon
Global Business Development	Shane Hamill
Corporate Services	Susan McDonnell
Organisation and Industry Talent	Michael Murphy
Meat, Food and Beverages	John Murray
Horticulture and Farmer Engagement	Mike Neary
Origin Green	Deirdre Ryan

## Overseas Offices

Amsterdam	Laura Crowley
Dubai	Kieran Fitzgerald
Dusseldorf	Gabriele Weiss Brummer
Lagos	Ese Okpomo
London	Donal Denvir
Madrid	Cecilia Ruiz
Milan	James O'Donnell
New York	Henry Horkan
Paris	Nicolas Ranninger
Shanghai	Conor O'Sullivan
Singapore	Lisa Phelan
Stockholm	Linda Madigan
Tokyo	Joe Moore
Warsaw	Krzysztof Pogorzelec

# STAFF STRUCTURE

Bord Bia colleagues were highly engaged and committed to the delivery of the organisations strategy as evidenced in the Great Place to Work Staff Survey 2023. Accreditation to this standard was achieved for the second year running. A concerted effort was undertaken during 2023 to ensure that colleagues were kept up to date on the organisation priorities and activities through monthly Town Halls and other communications activity.

The commitment and dedication of the Bord Bia colleagues was demonstrated strongly in 2023, as the organisation innovated the delivery of activity to achieve strategic goals. Bord Bia's Performance Development Process was central to aligning individuals' personal priorities to the delivery of the Statement of Strategy 2022 to 2025.

The Bord Bia employer brand remained strong with high levels of interest in Bord Bia roles both internally and externally. Bord Bia's achievement of Great Place to Work accreditation has underlined that position. During the course of 2023, Bord Bia held 44 competitions of permanent roles. Staff turnover did increase in 2023 but at a rate lower than the prevailing market.

Bord Bia's talent management framework is comprised of five key pillars:

1. *Recruitment and Selection* with a focus on securing the best talent.
2. *Leadership and Management Development*, to empower management to support and enable colleagues to deliver on strategy and maximise impact.
3. *High Levels of Staff Engagement* to ensure that all colleagues understand and align to business priorities and the needs of clients and stakeholders,
4. *A Learning and Development Framework* with a focus on developing internal talent, and making training investments that align to strategy delivery, thereby strengthening Bord Bia's employer brand with both current and potential colleagues; and
5. *Succession Planning* with a focus on accelerated career development.

The Talent/HR Team focused on the following key priorities.

- **Best in Class People and Performance Management:**

building best practice people management capability, through the ongoing promotion of day-to-day conversations, focused on priorities through a coaching and mentoring style with an emphasis on developing talent on a continuous improvement basis. Through the continued development of our Performance Development Process, greater emphasis is now placed on individual Personal Growth Plans.

- High levels of Staff Engagement to fuel the unique Bord Bia culture and values.
- The development of **a learning and development** framework for the period 2022-24 to ensure Bord Bia has the necessary skills to deliver the strategy in the future, including sustainability, integrated client customer planning, and digital enablement.
- Optimising **organisational design** and continually enhancing role clarity and structure continued to be important to strengthen the organisation's ability to deliver the strategy. Revised job descriptions detailing accountabilities were developed and published internally.
- Providing an efficient and effective range of employee services is delivered through an **HR Management System** (BordBiaHR) and an integrated HR Ticketing facility.



# BORD BIA BOARD

<p><b>CHAIR (DESIGNATE)</b></p> <p><b>Larry Murrin</b> Managing Director, Dawn Farm Foods</p> <p><b>MEMBERS</b></p> <p><b>Lorraine Allen</b> Managing Director of Brand Innovation Ireland Appointed January 22nd, 2019</p> <p><b>Niall Browne</b> Chief Executive, Dawn Meats Appointed January 9th, 2019</p> <p><b>Sharon Buckley</b> Chief Commercial Officer, Musgrave Group Appointed July 7th, 2023</p> <p><b>Michael Cronin</b> Agrifood Consultant Appointed January 22nd, 2019</p> <p><b>Mary Delaney</b> Sustainability and Business Development Consultant Appointed July 7th, 2023</p> <p><b>Denis Drennan</b> President, ICMSA Appointed January 25th, 2024</p> <p><b>Patrick Fitzgerald</b> Fitzgerald Nurseries Appointed August 28th, 2022</p> <p><b>Francie Gorman</b> President, Irish Farmers Association Appointed February 20th, 2024</p> <p><b>Colm Hayes</b> Assistant Secretary General, Department of Agriculture, Food &amp; Marine Appointed November 15th, 2023</p> <p><b>Karen Kerrigan</b> Kerrigan's Mushrooms Appointed June 16th, 2021</p> <p><b>Cliona Murphy</b> Former Vice President Quality Assurance, PepsiCo Appointed November 15th, 2023</p>	<p><b>Pat Murphy</b> President and CEO Primary Dairy and Agribusiness, Kerry Group Plc. Appointed May 28th, 2019</p> <p><b>Karina Pierce</b> Professor of Dairy Production, UCD Appointed July 4th, 2023</p> <p><b>Jim Woulfe</b> Former CEO Dairygold Co-Operative Society Appointed August 28th, 2022</p> <p><b>Chief Executive</b> <b>Jim O'Toole</b></p> <p><b>Secretary/Director</b> <b>Susan McDonnell</b></p> <p><b>CHANGES DURING 2023</b></p> <p><b>Term of Office Ended June 15th, 2023</b> Tony Keohane Tom Moran</p> <p><b>Appointed July 4th, 2023</b> Sharon Buckley Mary Delaney Karina Pierce</p> <p><b>Resigned July 31st, 2023</b> Sinéad McPhillips</p> <p><b>Appointed November 15th, 2023</b> Colm Hayes (casual vacancy) Cliona Murphy</p>	<p><b>CHANGES DURING 2024</b></p> <p><b>Resigned January 5th, 2024</b> Pat McCormack</p> <p><b>Resigned February 8th, 2024</b> Tim Cullinan</p> <p><b>Term of Office Ended February 29th, 2024</b> Dan MacSweeney</p> <p><b>Appointed January 25th, 2024</b> Denis Drennan</p> <p><b>Re-appointed February 13th, 2024</b> Colm Hayes</p> <p><b>Appointed February 20th, 2024</b> Francie Gorman (casual vacancy)</p> <p><b>Re-appointed March 25th, 2024</b> Francie Gorman</p>
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# BORD BIA

## CONSUMER FOODS BOARD

<p><b>CHAIR</b>  <b>Lorraine Allen</b>          Managing Director Brand Innovation          Ireland</p> <p><b>MEMBERS</b>  <b>Alison Cowzer</b>          Co-Founder          East Coast Bakehouse</p> <p><b>Margaret Daly</b>          Deputy CEO          Errigal Bay</p> <p><b>Kathryn D’Arcy</b>          Corporate Affairs and          Communications Director          Irish Distillers</p> <p><b>Maurice Hickey</b>          Managing Director          Green Isle Foods</p> <p><b>Jacquie Marsh</b>          Director, The Butler’s Pantry</p>	<p><b>John Noonan</b>          Independent Consultant</p> <p><b>Pat Rigney</b>          Managing Director,          Fastnet Brands Co. Ltd.</p> <p><b>Simon Walker</b>          Chief Executive          Kepak Convenience Foods</p>	<p><b>CHANGES DURING 2023</b></p> <p><b>Term of Office Ended February 25th, 2023</b>          Maurice Hickey          Michelle Walshe</p> <p><b>Reappointed June 6th, 2023</b>          Maurice Hickey</p> <p><b>Term of Office ended June 8th, 2023</b>          Pat Rigney</p> <p><b>Reappointed June 9th, 2023</b>          Pat Rigney</p> <p><b>Term of Office ended November 11th, 2023</b>          Catherine Neilson</p>
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# BORD BIA

## MEAT AND LIVESTOCK BOARD

<p><b>CHAIR</b></p> <p><b>Karina Pierce</b> Professor, Dairy Production, UCD</p> <p><b>MEMBERS</b></p> <p><b>Sorcha Donnelly</b> Commercial Director, Kepak</p> <p><b>Jim Hanley</b> Chief Executive, Rosderra Irish Meats</p> <p><b>Sarah Hanley</b> Pig and Poultry Policy Executive, Irish Farmers' Association</p> <p><b>Martin Kane</b> Managing Director, ABP Ireland</p>	<p><b>Frank McMyler</b> Country Manager, Manor Farm</p> <p><b>Jack Molloy</b> Associated Craft Butchers of Ireland</p> <p><b>Des Morrison</b> Irish Creamery Milk Suppliers' Association</p> <p><b>Kevin Quinn</b> Quinn International Livestock</p> <p><b>Nigel Sweetnam</b> National Poultry Chair, Irish Farmers' Association</p>	<p><b>CHANGES DURING 2023</b></p> <p><b>Appointed (Chair) October 12th, 2023</b> Karina Pierce</p> <p><b>Term of Office Ended June 15th, 2023</b> Tony Keohane (Chair)</p> <p><b>Resigned November 16th, 2023</b> Kevin Comiskey</p> <p><b>CHANGES DURING 2024</b></p> <p><b>Resigned January 9th, 2024</b> Brendan Golden</p>
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# BORD BIA DAIRY BOARD

## CHAIR

**Jim Woulfe**  
Former CEO Dairygold

## MEMBERS

**Stephen Arthur**  
Chair,  
IFA Dairy Committee

**Louise Byrne**  
Department of Agriculture, Food and the  
Marine

**Pat Clancy**  
Dairygold Co-operative Society

**Eleanor Collins**  
CFO, Primary Dairy Business, Kerry Group

**Anne Maria Cotter**  
ICMSA

**Anne Marie Henihan**  
CEO,  
Dairy Production Technology Centre,  
UCL

**William Meagher**  
ICOS

**Aoife Murphy**  
Director of Ingredients,  
Tirlan

**Anne Randles**  
Ornua

**Eoghan Sweeney**  
Commercial Director  
Lakeland Dairies

## CHANGES DURING 2023

### Appointed March 2nd, 2023

Eoghan Sweeney

### Resigned June 4th, 2023

Karina Pierce

### Reappointed October 12th, 2023

Stephen Arthur

### Appointed (Chair) October 12th, 2023

Jim Woulfe

## CHANGES DURING 2024

### Resigned March 5th, 2024

John Holland

# BORD BIA

## QUALITY ASSURANCE BOARD

<p><b>CHAIR</b></p> <p><b>Michael Cronin</b> Agrifood Consultant</p> <p><b>MEMBERS</b></p> <p><b>Paul Bell</b> Bell Agriculture</p> <p><b>Ruth Dalton</b> Musgraves</p> <p><b>Maria Dunne</b> Meat and Meat Policy Division, Department of Agriculture, Food and the Marine</p> <p><b>Maeve Henchion</b> Dept. Agrifood Business and Spacial Analysis, Teagasc</p> <p><b>Aoife MacEoin</b> Chief Executive, Irish Egg Association</p> <p><b>Noel Murphy</b> Dairy Committee Chair, ICMSA</p>	<p><b>Paul Nolan</b> Group Development Manager, Dawn Meats</p> <p><b>Liam O’Flaherty</b> Dairygold Co-operative Society</p> <p><b>Siobhan Ward</b> Technical Manager, Country Crest</p>	<p><b>CHANGES DURING 2023</b></p> <p><b>Resigned January 11th, 2023</b> Margaret Farrelly</p> <p><b>Term of Office Ended February 25th, 2023</b> Paul Bell</p> <p><b>Re-appointed March 6th, 2023</b> Ruth Dalton Paul Nolan</p> <p><b>Reappointed June 9th, 2023</b> Paul Bell</p> <p><b>Appointed June 9th, 2023</b> Aoife MacEoin</p> <p><b>Term of Office Ended September 9th, 2023</b> Brian Rushe</p> <p><b>Term of Office Ended November 11th, 2023</b> Maria Dunne</p> <p><b>CHANGES DURING 2024</b></p> <p><b>Re-appointed January 16th, 2024</b> Maria Dunne</p>
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# BORD BIA

## HORTICULTURE BOARD

<p><b>CHAIR</b>  <b>Karen Kerrigan</b>  Kerrigan Mushrooms</p> <p><b>MEMBERS</b>  <b>Ann Bolger</b>  Wonderfoods</p> <p><b>Martin Flynn</b>  Managing Director MF Nurseries</p> <p><b>Matt Foley</b>  Kilbush Nurseries</p> <p><b>Nicola Haines</b>  Tierney Haines</p> <p><b>Anna Kavanagh</b>  Horticulturalist and Sector Consultant</p>	<p><b>Celine Murrin</b>  University College, Dublin</p> <p><b>Sean Ryan</b>  Chair IFA Potato Committee</p> <p><b>Sarah Slazenger</b>  MD Powerscourt Estate and Garden Centre</p> <p><b>Con Traas</b>  The Apple Farm</p> <p><b>Padraig Tully</b>  Tully Nurseries</p> <p><b>Dr Jude Wilson</b>  Chief Scientific Officer, MBio – Monaghan Mushrooms</p>	<p><b>CHANGES DURING 2023</b></p> <p><b>Appointed February 2nd, 2023</b>  Martin Flynn  Anna Kavanagh  Sarah Slazenger  Jude Wilson</p> <p><b>Term of Office Ended February 25th, 2023</b>  Matt Foley  Con Traas  Nicola Haines</p> <p><b>Re-appointed June 9th, 2023</b>  Matt Foley  Con Traas  Nicola Haines</p> <p><b>Appointed June 9th, 2023</b>  Sean Ryan</p> <p><b>Term of Office Ended June 18th, 2023</b>  Ann Bolger  Celine Murrin  Padraig Tully</p> <p><b>Re-appointed October 12th, 2023</b>  Ann Bolger  Celine Murrin  Padraig Tully</p>
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