

“It has taken us a long time to get where we are in terms of turnaround. We’ve become much more competitive than four or five years ago...We can’t throw that away.”



- 
- **Irish Foodservice Health Check**
 - **Key Trends and Drivers by Leading Channels**
 - **Wider Industry Trends**
 - **Top Tips for Success**

THE END OF AUSTERITY?



NESPRESSO®



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board



KEEP VAT AT 9%
Supporting Food, Tourism & Jobs



Growing the success of Irish food & horticulture



Irish Foodservice **Channel Insights**

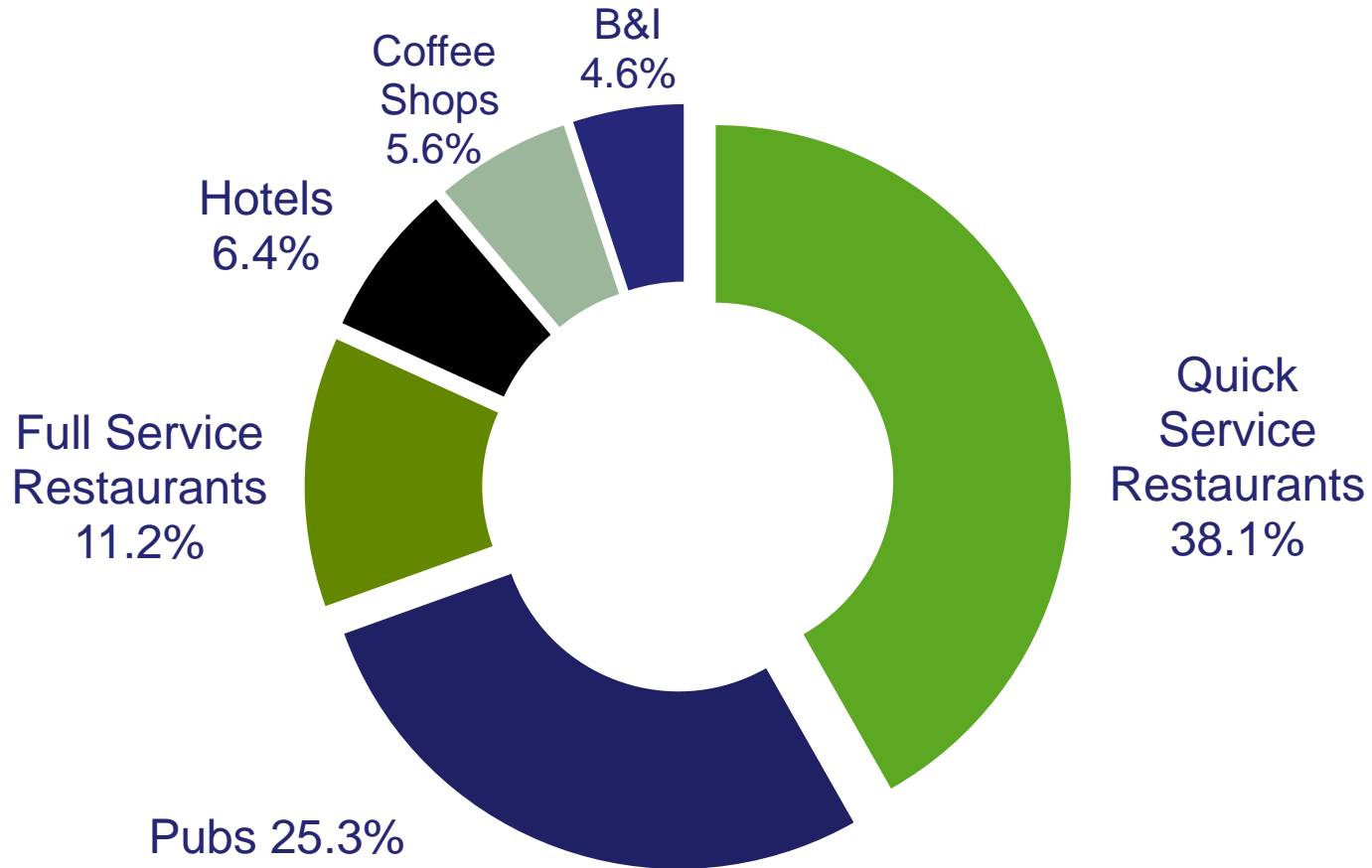
NOVEMBER 2014

Growing the success of Irish food & horticulture

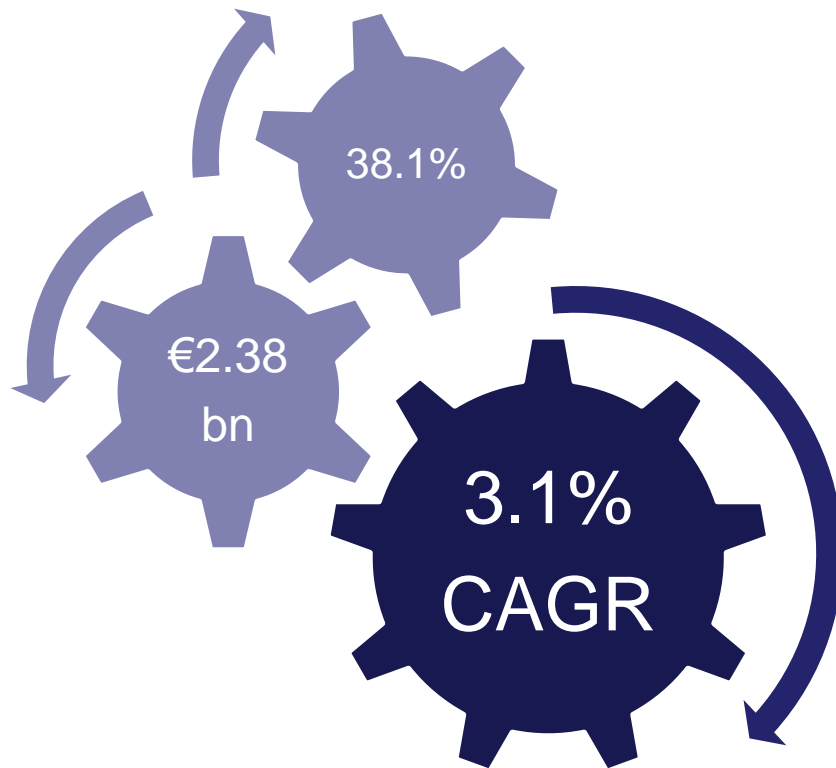
Bord Bia
Irish Food Board

www.bordbia.ie

FOODSERVICE IN IRELAND 2014 - €6.13BN

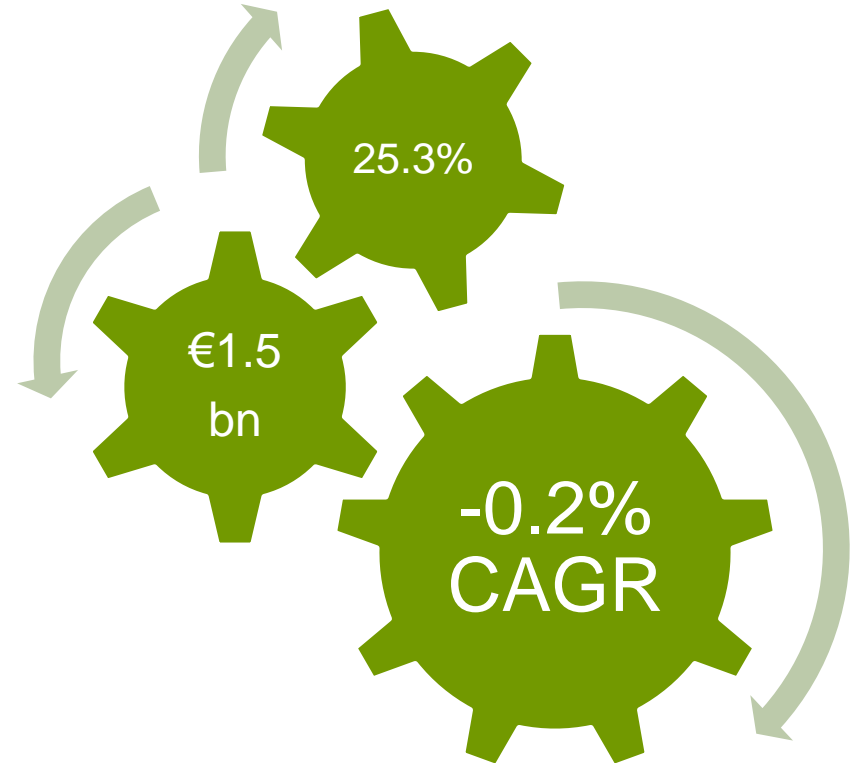


QUICK SERVICE RESTAURANTS

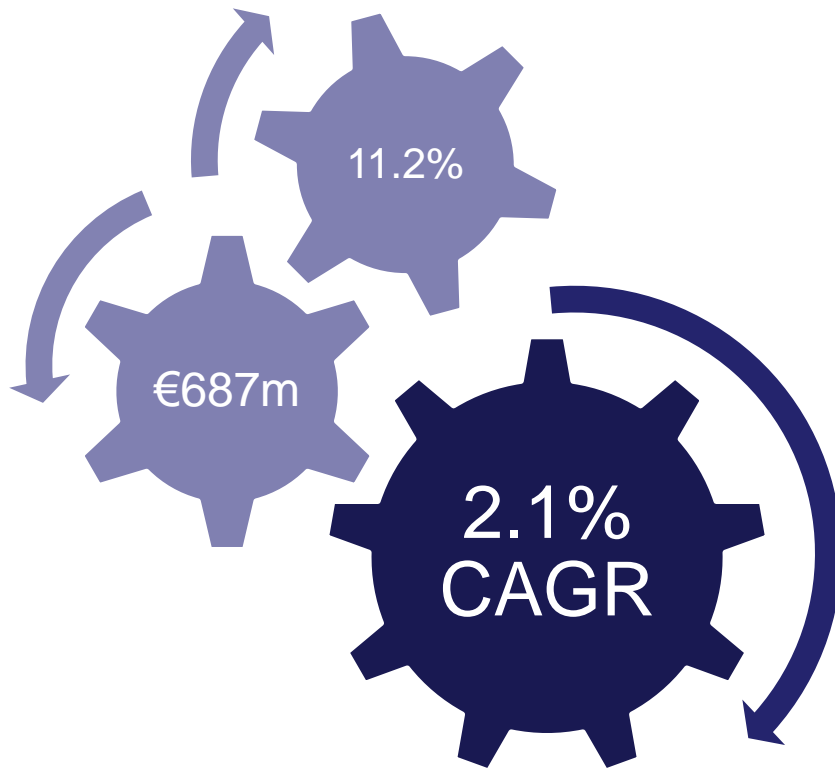


PUBS

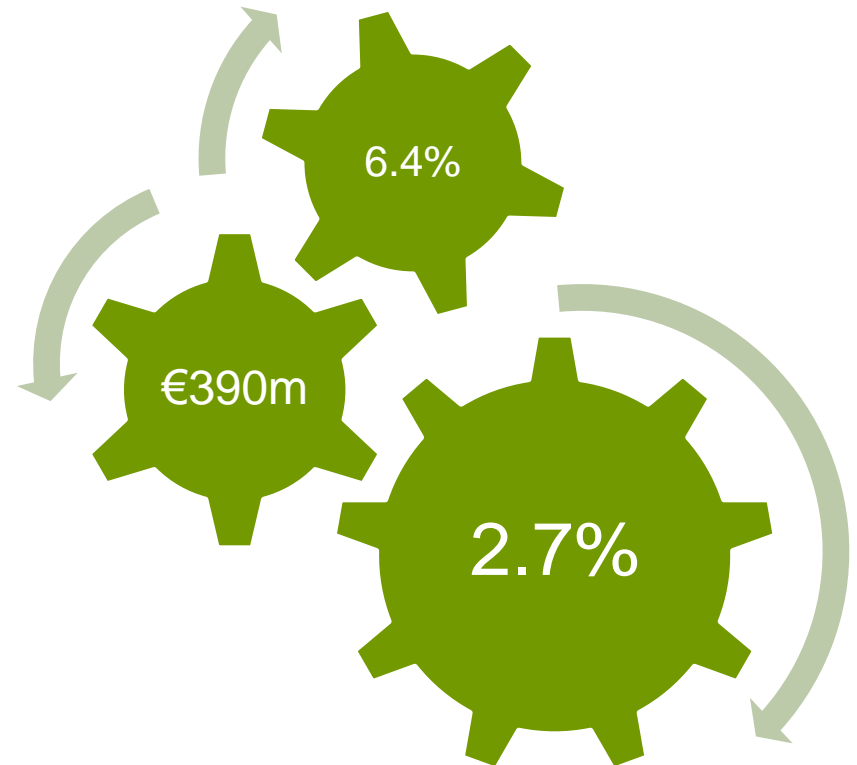
“Pubs must reinvent themselves. Many have begun changing their food offer, including more extensive menus. Pairings of wines and classic drinks are also on the rise.”



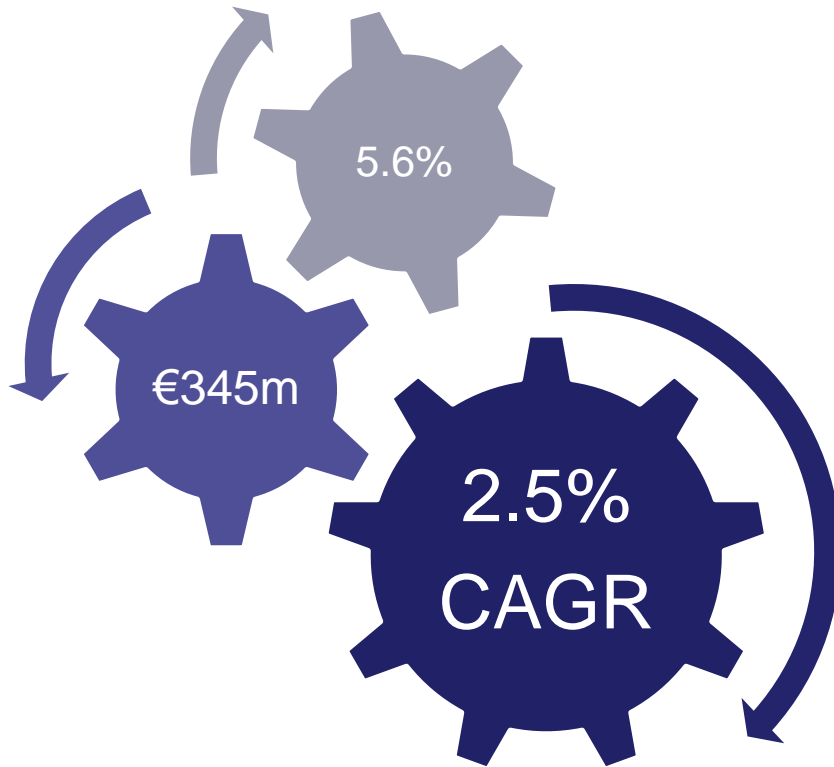
FULL SERVICE RESTAURANTS



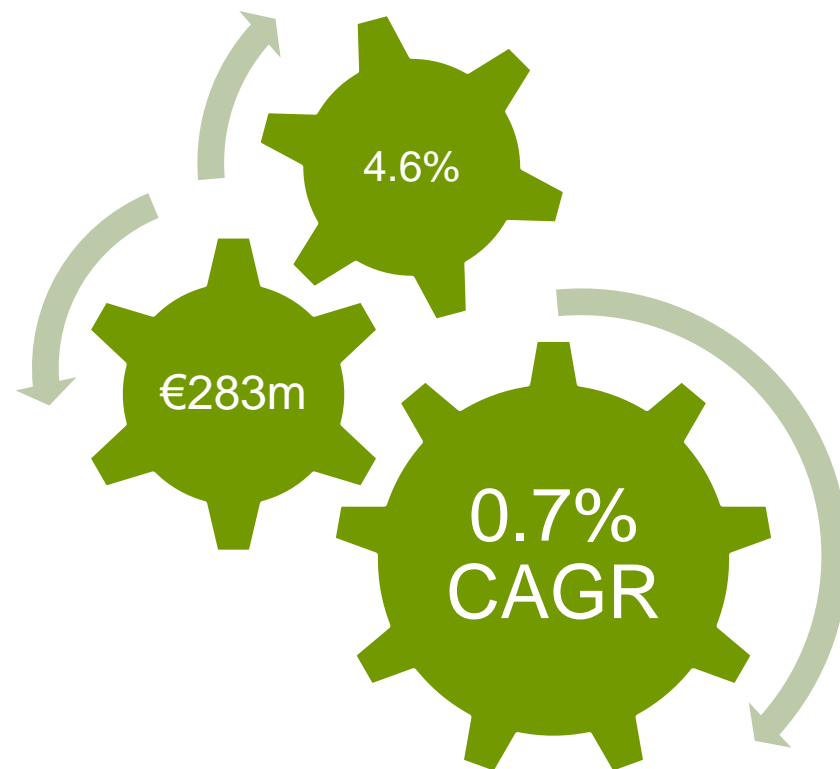
HOTELS



COFFEE SHOPS



BUSINESS & INDUSTRY



HEALTH & WELLBEING



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PROVENANCE



CONVENIENCE RETAIL



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FOR THE LOVE OF COFFEE



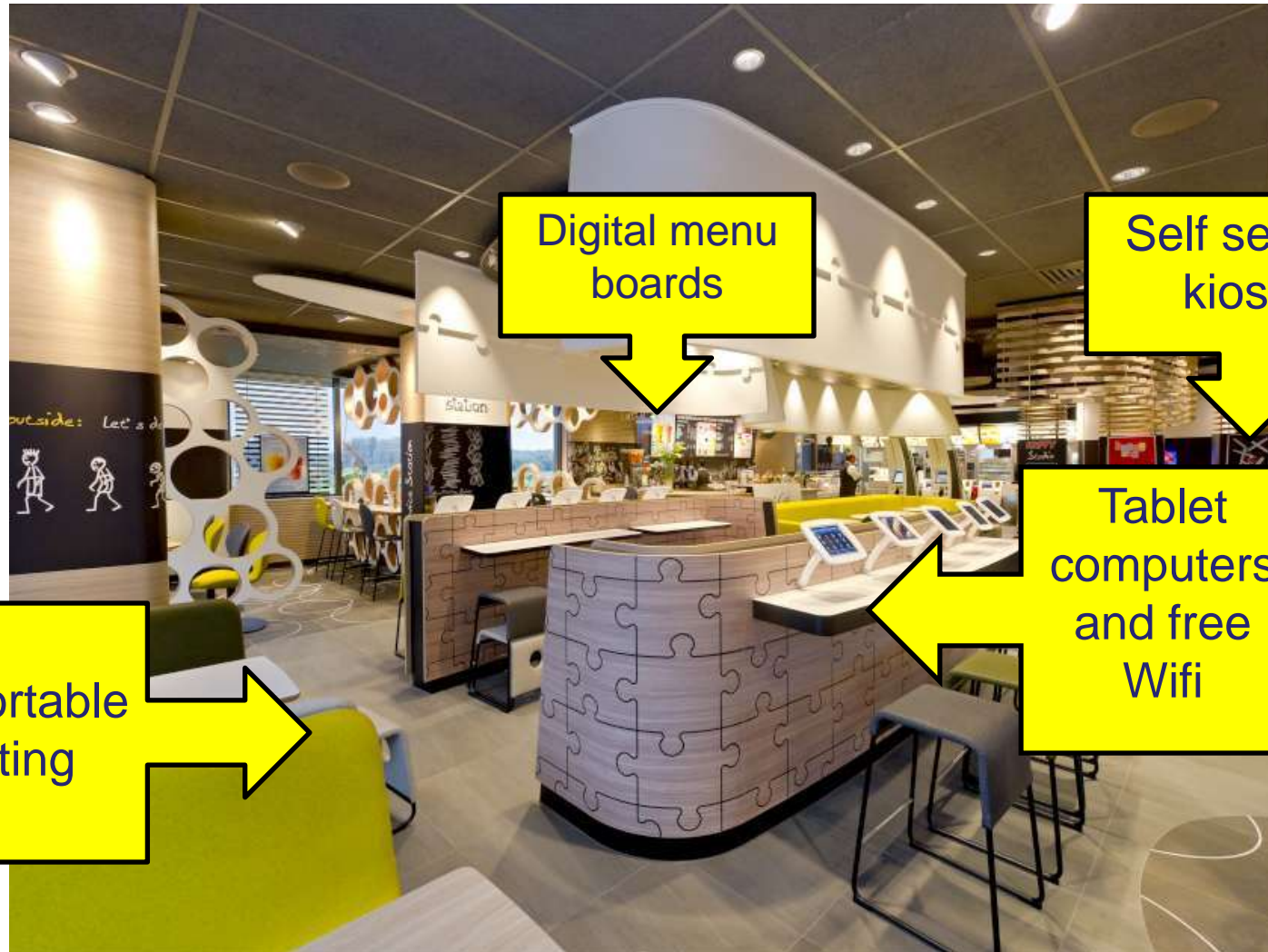
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TOP TIPS

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- **CAGR 1.9% - €6.476bn 2017**
 - **Understand where potential long term opportunities and risks may exist.**
 - **Distribution partnerships are critical to long term success.**
 - **Strengthen relationships with trading partners by providing support and guidance.**

- **Commercial Channels are benefiting from the wider economic growth, consumer confidence and rising tourist numbers.**
- **The Institutional Channels will remain relatively flat, but steady.**
- **Don't lose sight of how consumers are behaving – think convenience; technology; health and provenance.**

MCDONALD'S WOOLWICH: HIGH TECH MAKE-OVER



Digital menu boards

Self service kiosks

Tablet computers and free Wifi

Comfortable seating

“FRESHLY PREPARED, NATURAL FOOD”

- Founded in London in 1984
- End 2014:
 - 300 UK
 - 60 US
 - 10 Paris
 - 14 Hong Kong
 - 1 Shanghai
- YoY sales growth 17%

“Benefiting in change of habits towards eating on the go”