PATHWAYS

Growing Ireland's Largest Indigenous Industry

Food Harvest 2020.

A vision for Irish agri-food and fisheries

Mary Shelman
18th September 2014

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

PATHWAYS

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Food Harvest 2020.

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Pathways for Growth: 2010

Growing the success of Irish food & horticulture

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Irish Food Board

PATHWAYS
Growing Ireland's Largest Indigenous Industry

Ireland has an enviable agricultural situation that almost every other country would kill for…

… at a time when the global demand for food is projected to increase by 70% over the next 40 years.

Pathways for Growth

PATHWAYS
Growing Ireland's Largest Indigenous Industry

- Challenges
  - Fragmentation
  - Lack of consumer orientation
  - Low confidence in the future
- Solutions
  - Cooperation instead of competition
  - Innovation leading to differentiation
  - Brands built around customer feedback
  - Umbrella strategy

“Come See Us”

PATHWAYS
Growing Ireland’s Largest Indigenous Industry

- World class agricultural industry by 2016
- “We are natural and we can prove it”
  - Tough standards
  - Universal adoption
- Work as one to achieve export growth
- Umbrella brand for Irish food and drink

PATHWAYS

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A vision for Irish agri-food and fisheries

The CEO's Perspective 2014

Growing the success of Irish food & horticulture

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Irish Food Board

Surprises

PATHWAYS
Growing Ireland's Largest Indigenous Industry

- Speed at which China has become important market
- Rise of discounters and how good of a job they are doing

  Sourcing locally, selling locally
- Fonterra's "stumble"
- Success of Harvest 2020 & Origin Green

Most Businesses Are Stronger

PATHWAYS
Growing Ireland's Largest Indigenous Industry

- Improved competitiveness
- Global outlook
- Better customer orientation
- Higher ambitions
- Greater emphasis on talent
- Origin Green

Challenges Remain

PATHWAYS
Growing Ireland's Largest Indigenous Industry

- Ireland strategy predominantly sector based
- Farming sector not perfectly aligned

  … and volatility may amplify tensions
- High cost position hurts competitiveness
- Tough domestic market

Challenges Remain

PATHWAYS
Growing Ireland's Largest Indigenous Industry

- No big progress on consolidation / coopetition
- More support needed to help businesses scale
- Industry planning horizon beyond 2020