

# Progress in Sustainability and Market Developments in the Irish Poultry Sector

## POULTRY & EGG conference

Peter Duggan

9th November 2016



Working  
with nature

*Bord Bia*  
Irish Food Board

# What is Origin Green?

- **Business to business initiative**
- **Companies sign up to Sustainability Charter**
- **Farmers participate in Quality & Sustainability Schemes**



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# Perceptions of Ireland...



Viewed as green &  
natural...

We now need to prove it...

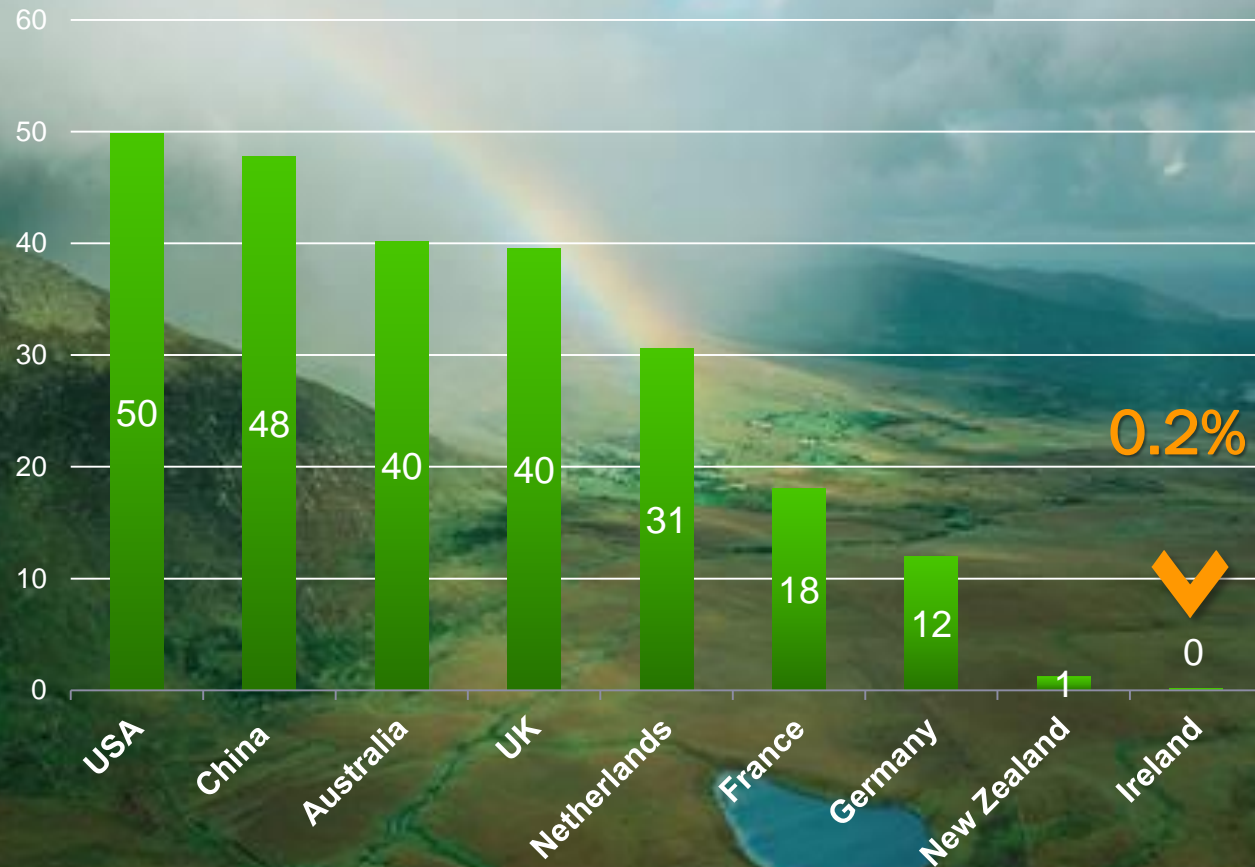


# IRELAND'S NATURAL ATTRIBUTES

## WATER AVAILABILITY

AGRICULTURE USES 70% OF  
THE WORLD'S FRESHWATER

Ireland has a very favourable  
water stress index  
(% of territory under water stress)



Source: Growingblue.com

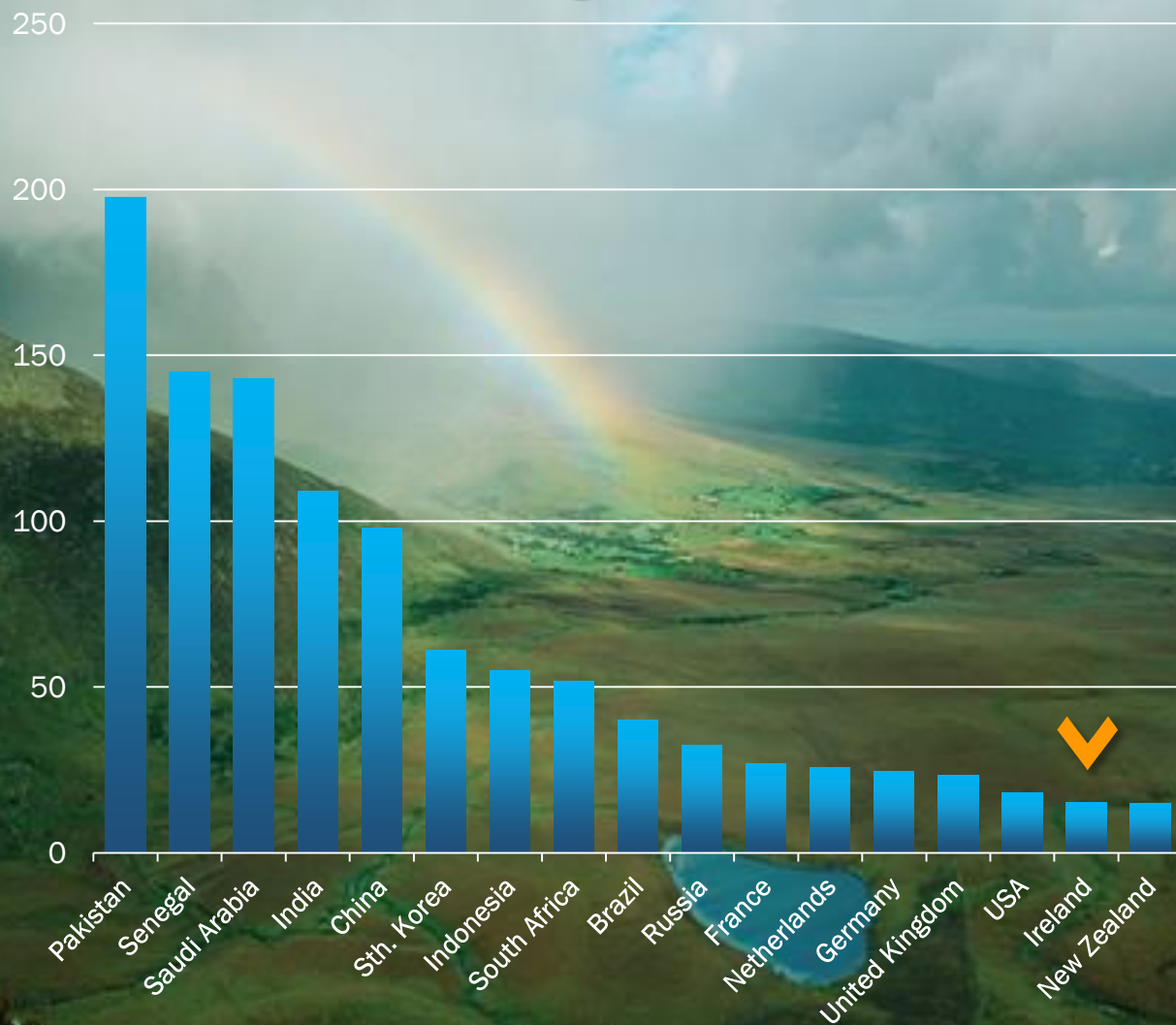
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# IRELAND'S NATURAL ATTRIBUTES

AIR QUALITY VERY HIGH

Urban Outdoor Air Pollution  
Annual mean PM10  
( $\mu\text{g}/\text{m}^3$ )



Source: World Health Organisation

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**Origin Green at  
Company Level**





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English

an initiative by **Bord Bia**  
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SGS

# Verified Members

Origin Green Verified Members have a proven and measured commitment to sustainability.

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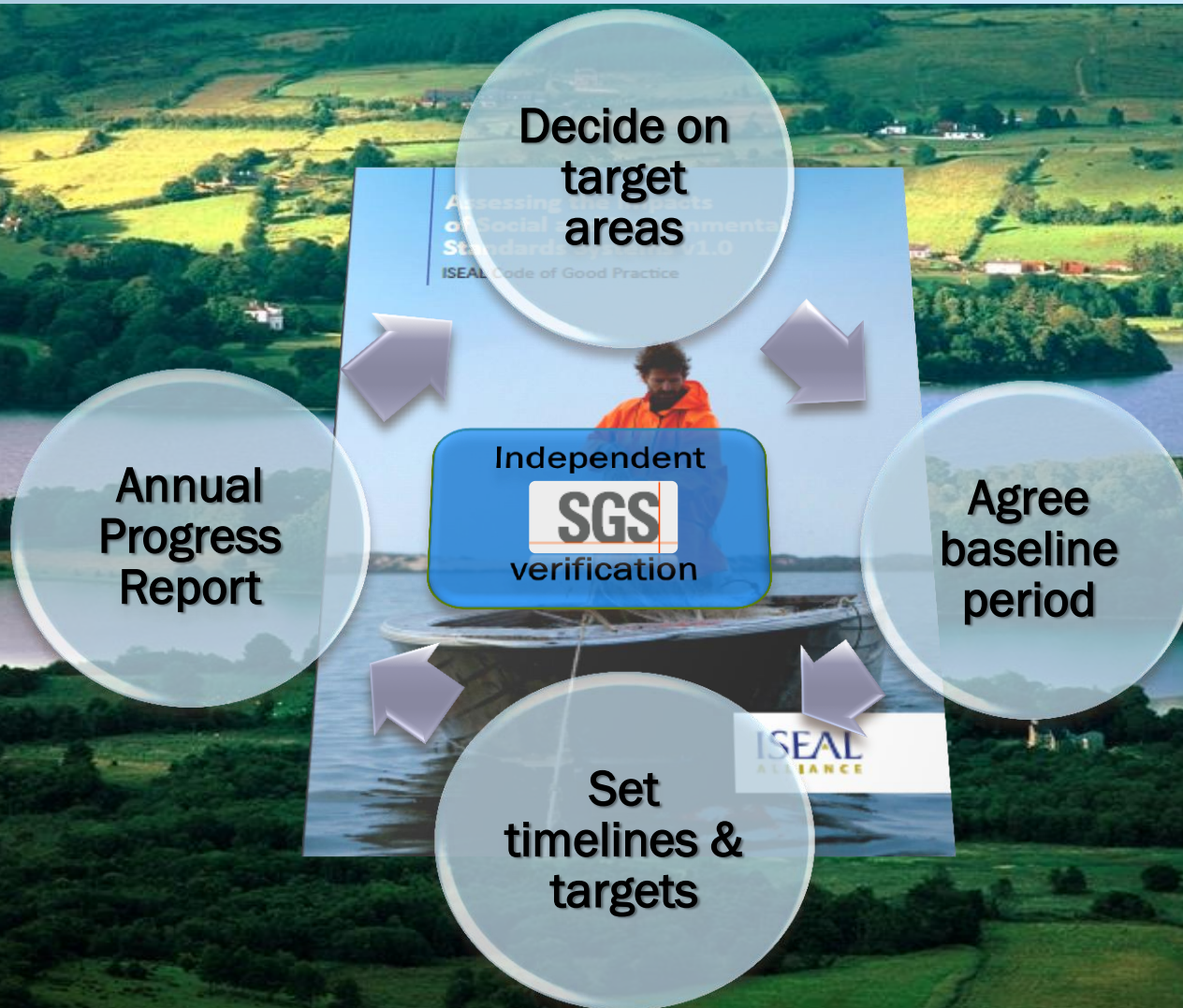
# ORIGIN GREEN VERIFIED MEMBERS



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# The Sustainability Charter



Origin Green Verified Members

# Company Recruitment Pipeline

507 Companies Registered

95% of exports

182 companies at workshop/  
plan development phase

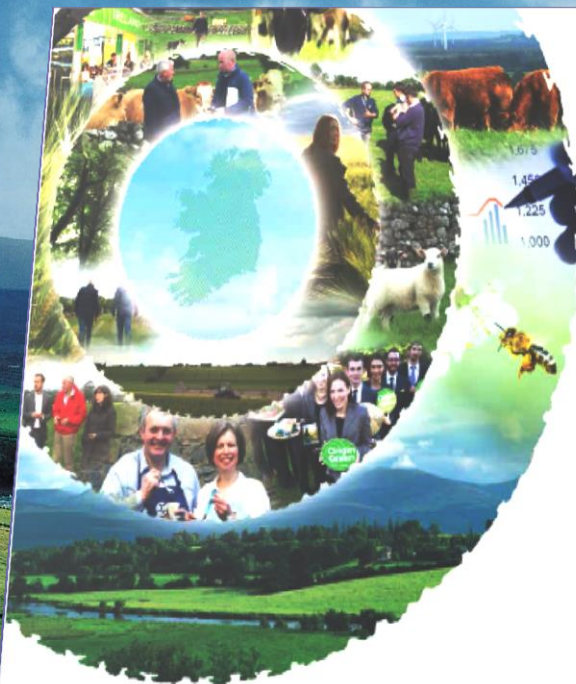
145 plans being processed

180 plans accepted

Over 85% of exports

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## SUSTAINABILITY REPORT 2015

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# More than 1,000 Targets Set



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# Advocates of Origin Green

*“Just last year, I had an opportunity which was phenomenal. I had the opportunity to experience firsthand the great work that we’re doing in Ireland and the industry leading approach that Ireland has taken to agriculture”*

**Don Thompson, CEO  
McDonalds**



**THE WORLD BANK**

*Ireland is leading the way in another important area – climate smart agriculture. Its Origin Green program has mobilized Irish farmers and food producers to set and achieve measurable sustainability targets.....we’re helping other countries learn from this model*

**Jim Yong Kim, World Bank President**





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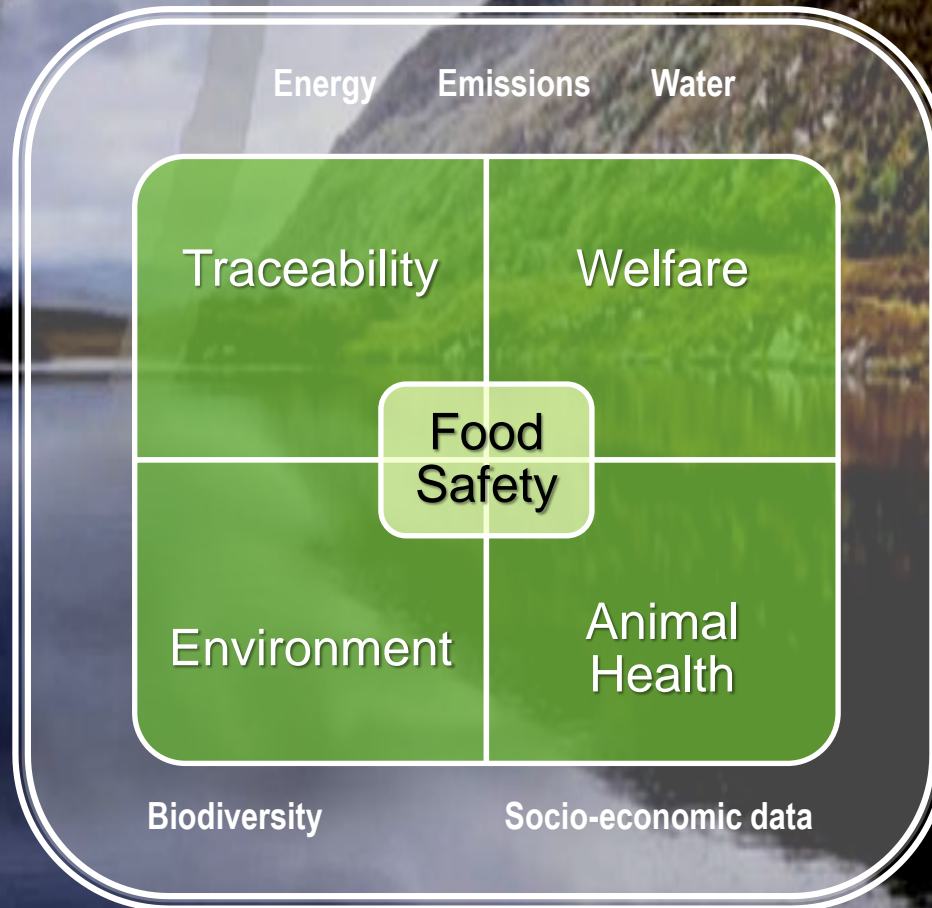
# Farm level developments

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# Measuring What Matters



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# Farm Quality & Sustainability Audits



48,000 Beef Farms

90% of Beef Exports, Audited & Carbon Footprinted

18,000 Dairy Farms

100% Milk production, participants entering audit cycle

Pigmeat, Poultry, Lamb, Eggs, Horticulture, Grain

Sustainability measures being implemented

*110,000 carbon assessments on farms to date*

# Egg – Sustainability Model



## Poultry Completion Schedule

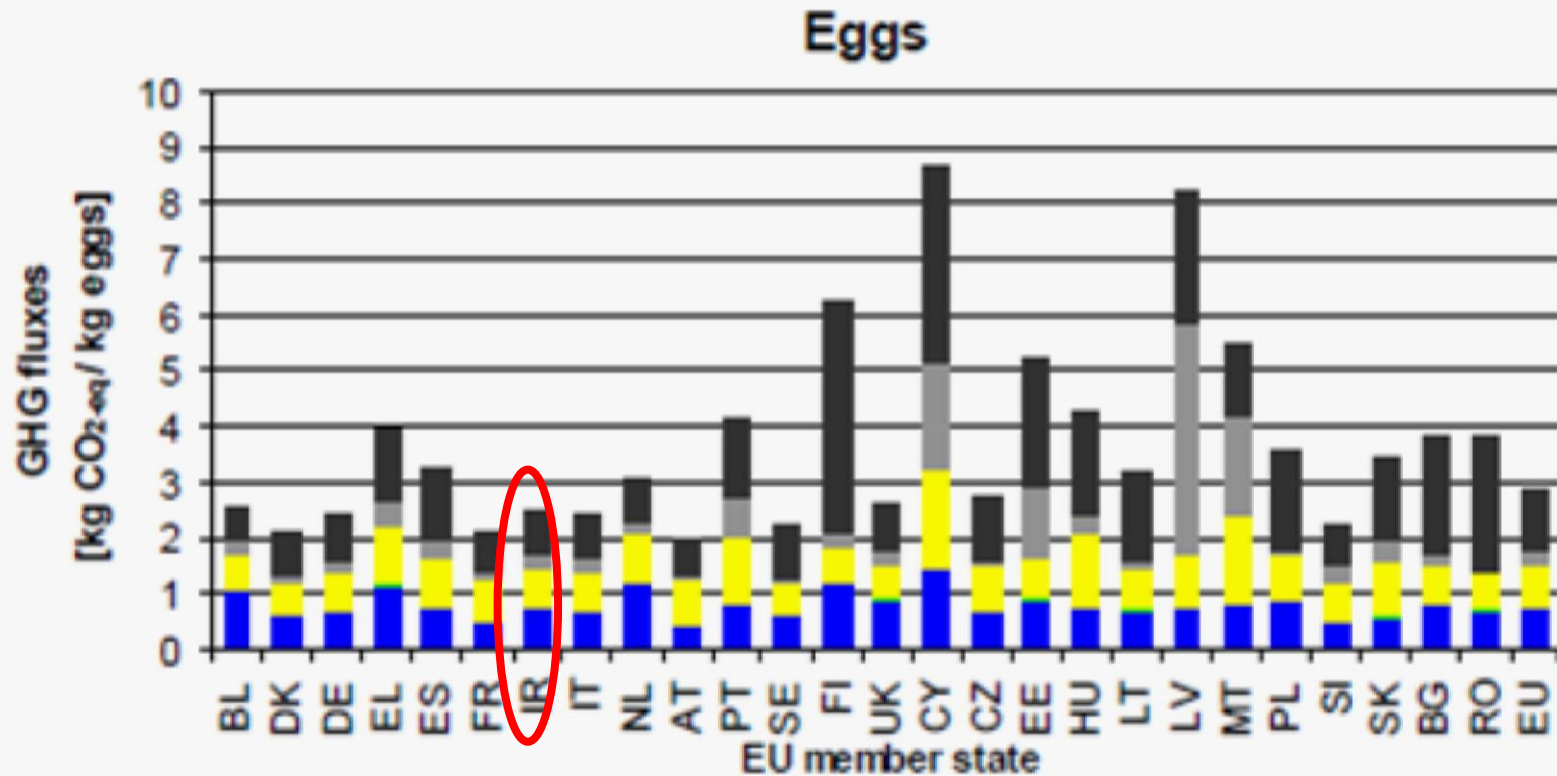


Model  
Review

Roll out as  
part of QA

# Key factors in Sustainable Production

## *Greenhouse Gas Emissions*



Source: EU JRC Evaluation of the livestock sector's contribution to the EU greenhouse gas emissions (GGELS)

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# Egg Sustainability Criteria

- ❖ Productivity levels
- ❖ Feeds
- ❖ Manure management
- ❖ Energy use
- ❖ Water use
- ❖ Biodiversity measures
- ❖ Socio- Economic
- ❖ Land Management  
(free range)

# Poultry – Sustainability Model



## Poultry Completion Schedule



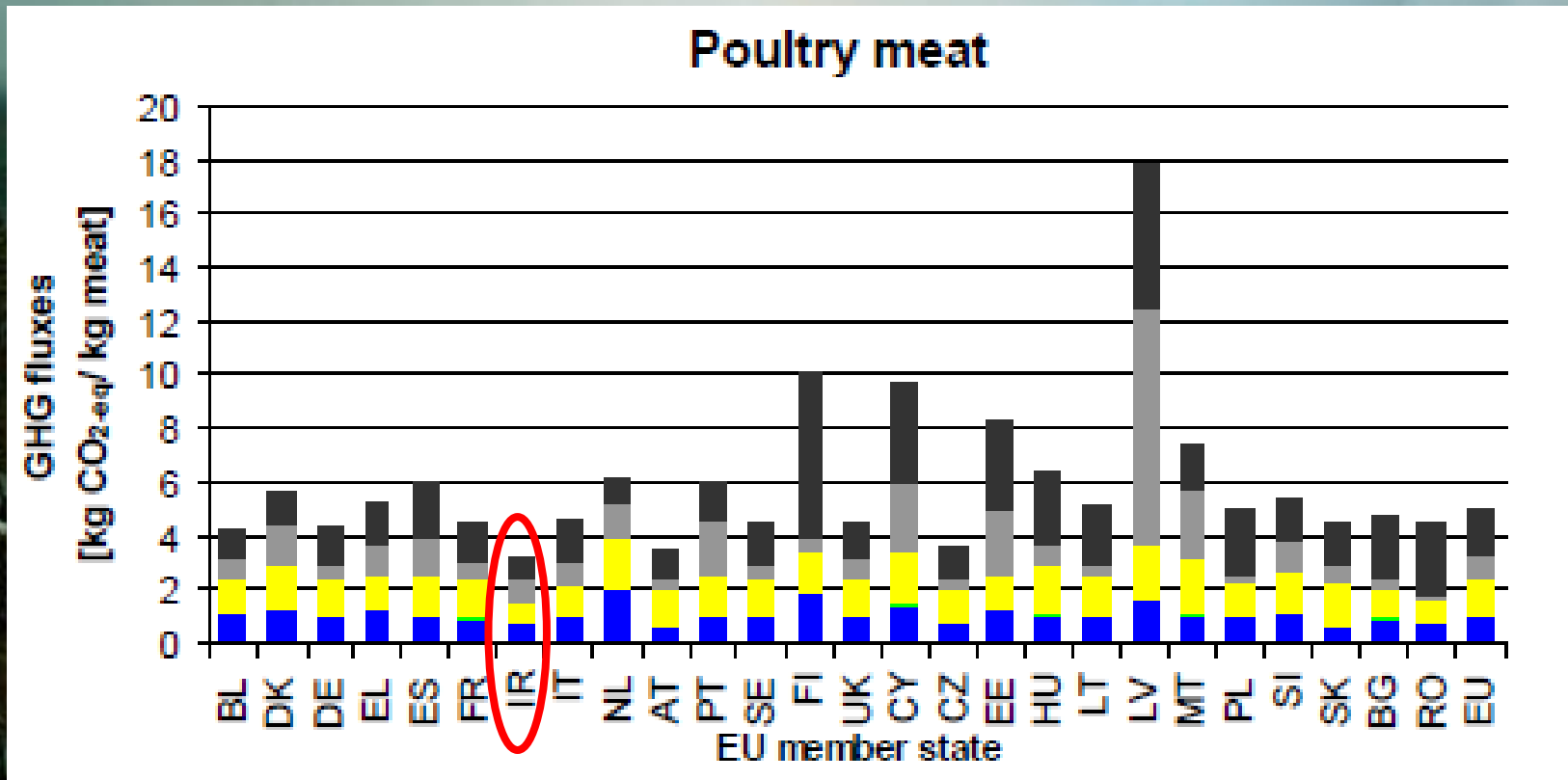
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# Market Developments

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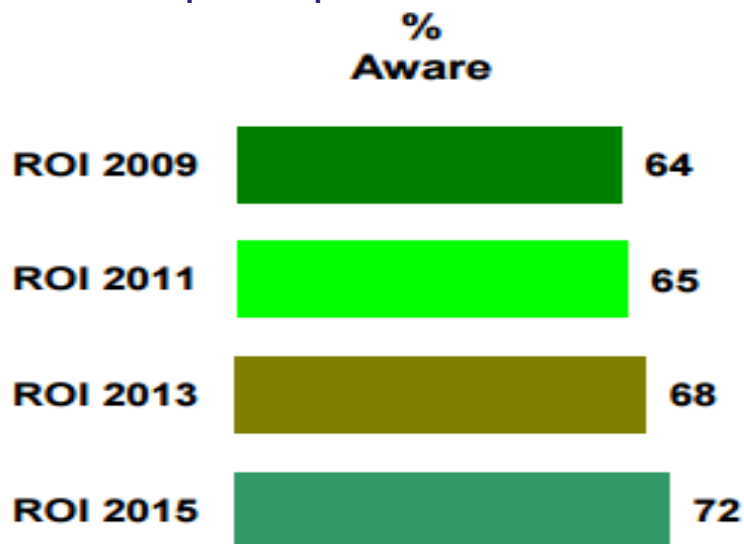
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# What is driving sustainability?

## Awareness of the Term Carbon Footprint

2015 - Bord Bia Periscope Report



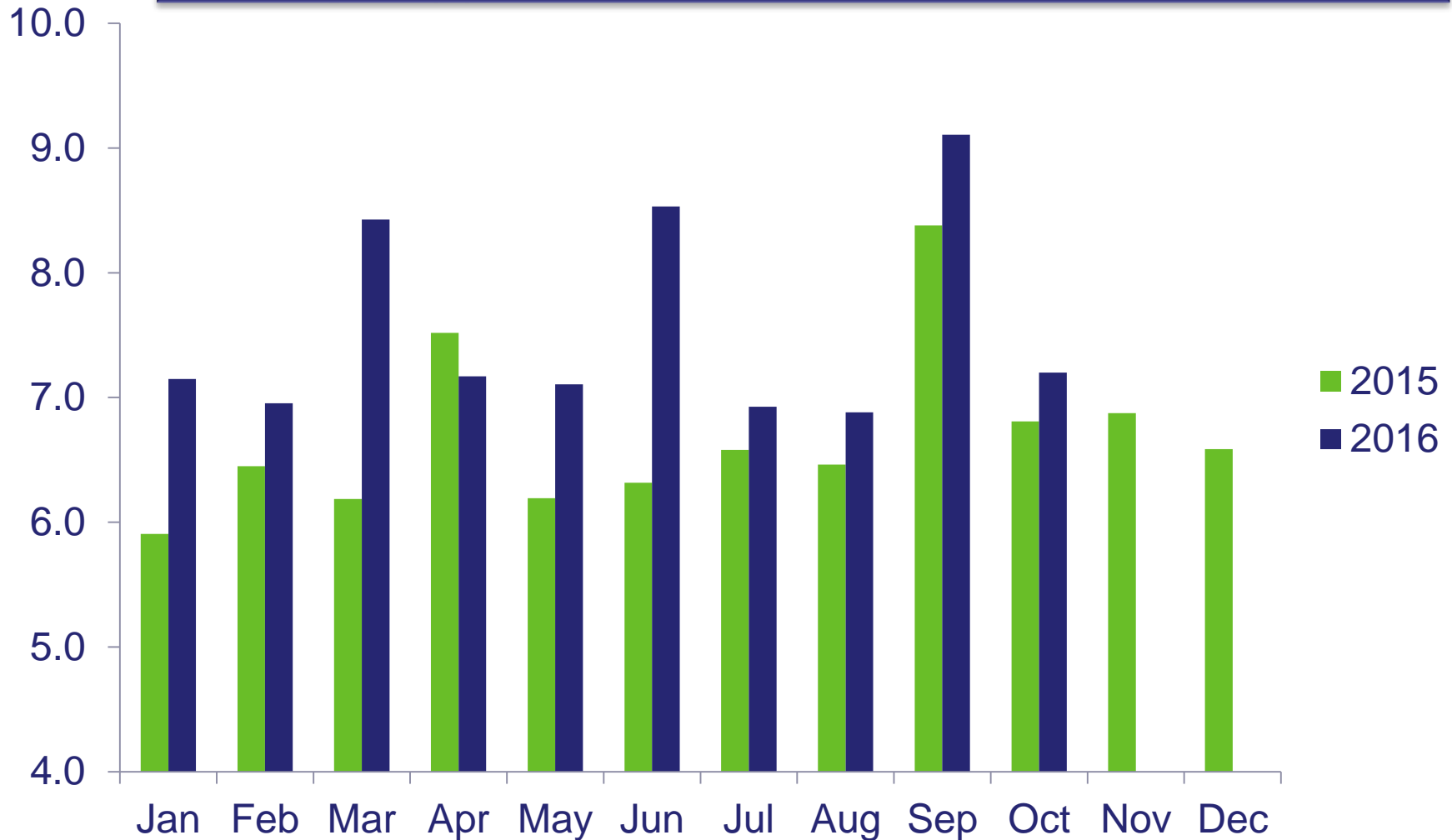
*In 2015, Higher Amongst:*

- 35-54 yrs
- AB's
- Responsible for grocery shopping
- Entertain at home more often

# Irish poultry supplies running at record levels

**Poultry supplies on track to exceed 90 million birds**

Million head



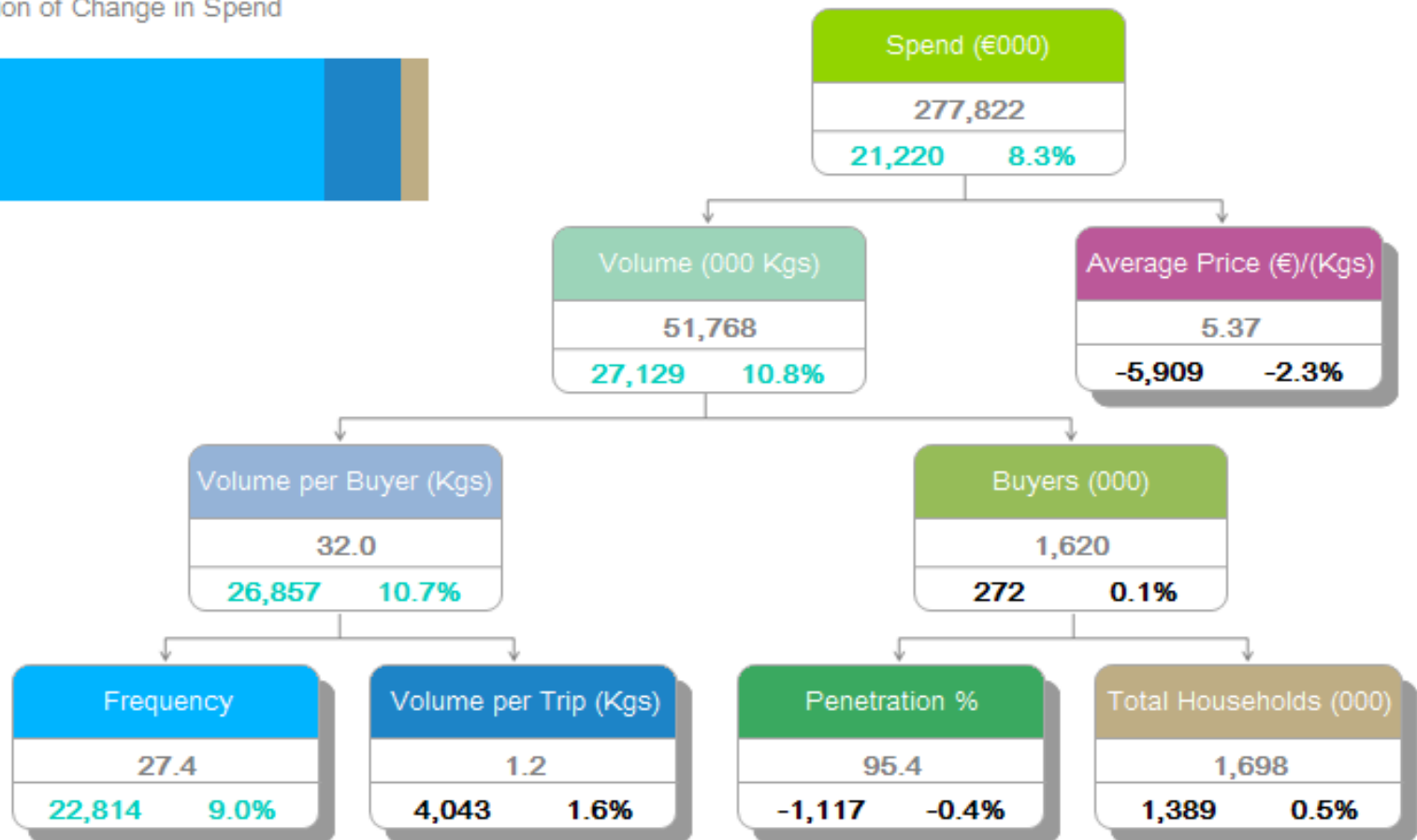


# Poultry Consumption 11% higher

09-Oct-16 vs. Previous Year

Total Poultry | TOTAL MARKET | Total Meat | Total Market | 52 w/e | Previous Year

Attribution of Change in Spend

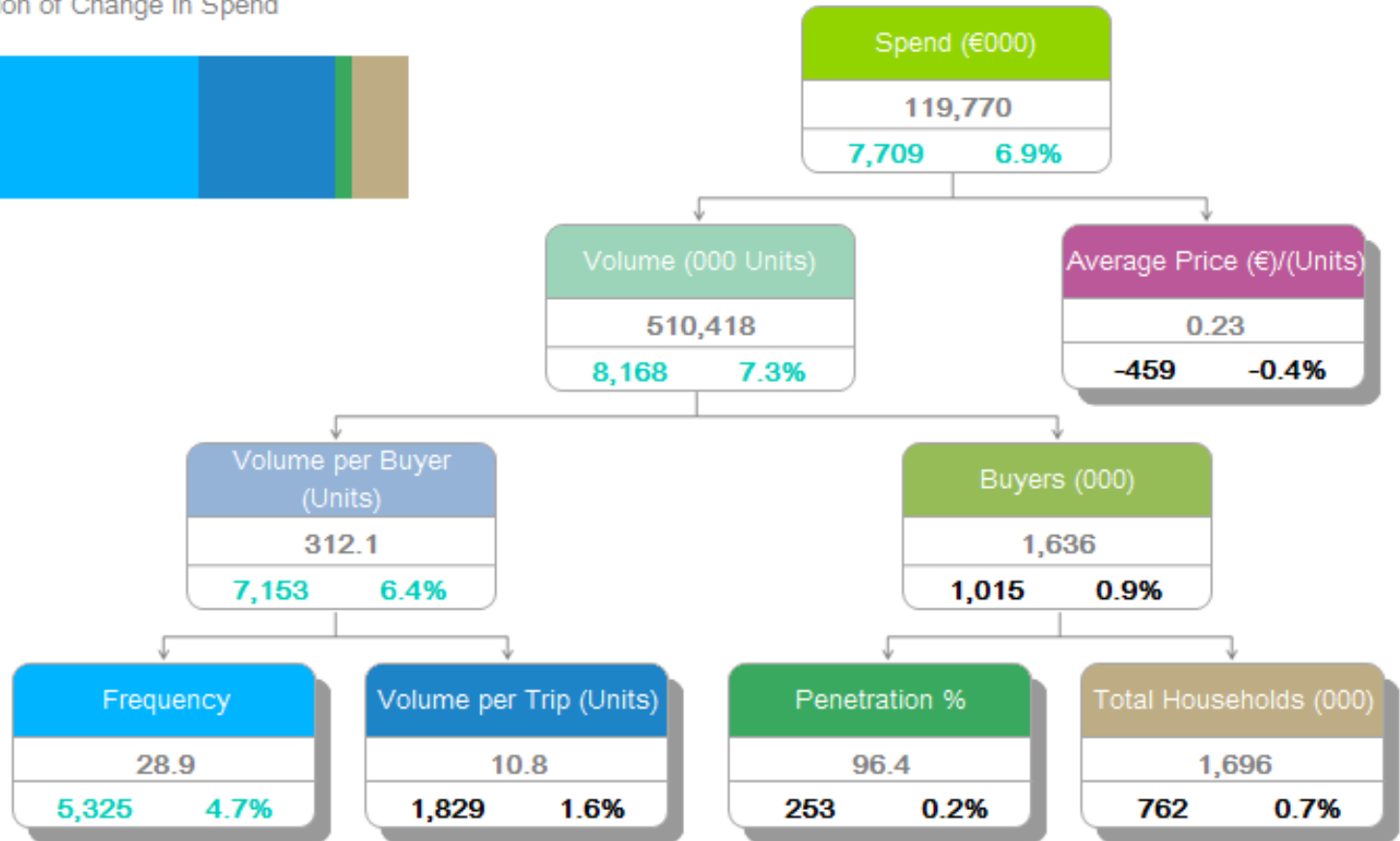


KEY  
 = > 3% Change  
 = < -3% Change

# Total Eggs Consumption 7% higher

The main contributor to growth has been an increase in frequency.

Attribution of Change in Spend



KEY

= > 3% Change

= < -3% Change



# Target Demographic

Pre-  
family

20-45 year olds, male & female shoppers, no children, health conscious.  
Approx. 321,000

Only **1 in 4** of pre-family life stage consumers consider Eggs to be top of their shopping list – a key opportunity for growth.



# GET YOURSELF A SIX PACK EGGS. HIGH IN PROTEIN.



Your food is our passion



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Irish Food Board  
[bordbia.ie/eggs](http://bordbia.ie/eggs)

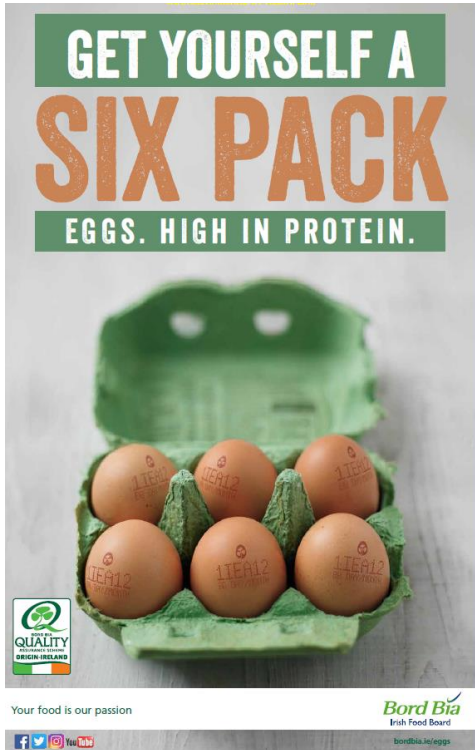
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# October 2016: Campaign Creative

*“Get yourself a six pack”*

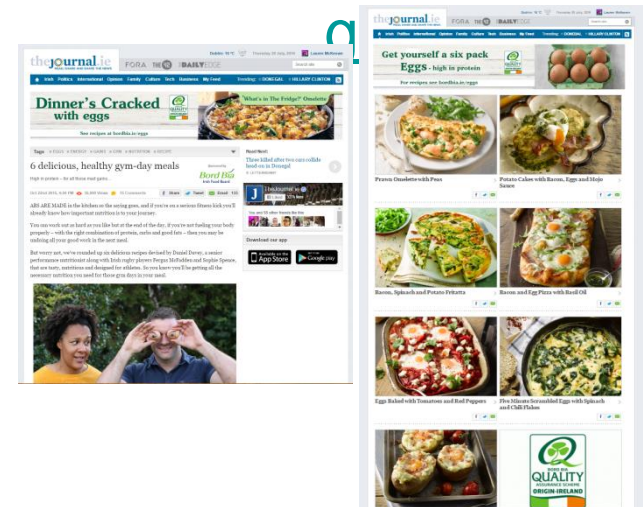


OUTDOOR



RADIO

[www.bordbia.ie/e](http://www.bordbia.ie/e)



DIGITAL

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# October 2016: Social Media (recipe videos)



- Created 10 new Egg recipe videos for 2016
- Demonstrating the versatility of Eggs to Irish consumers by focusing on lunch and dinner recipes



225K Views

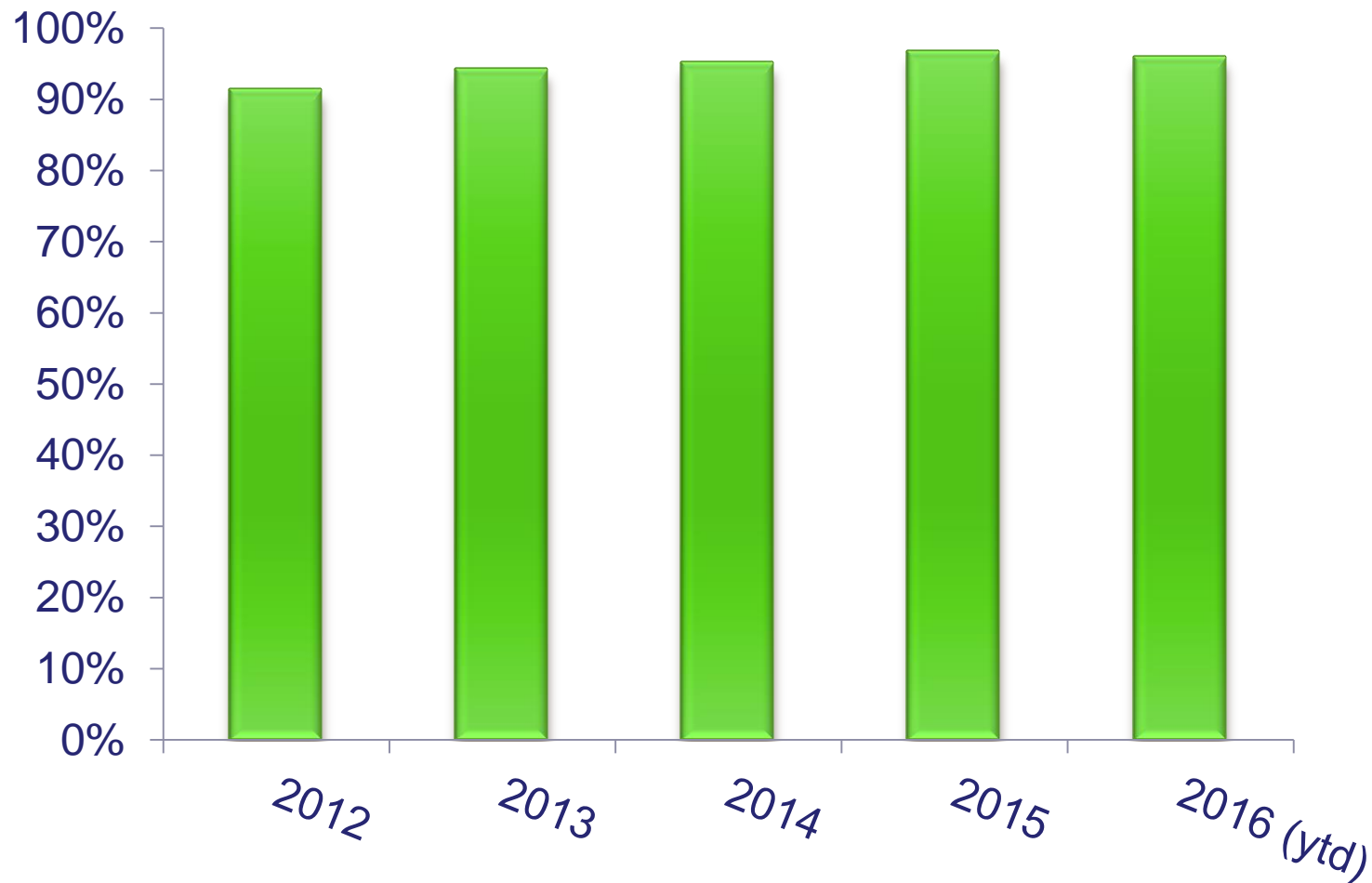
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# % Bord Bia QA Egg Facings at Retail





# Market Developments- Brexit

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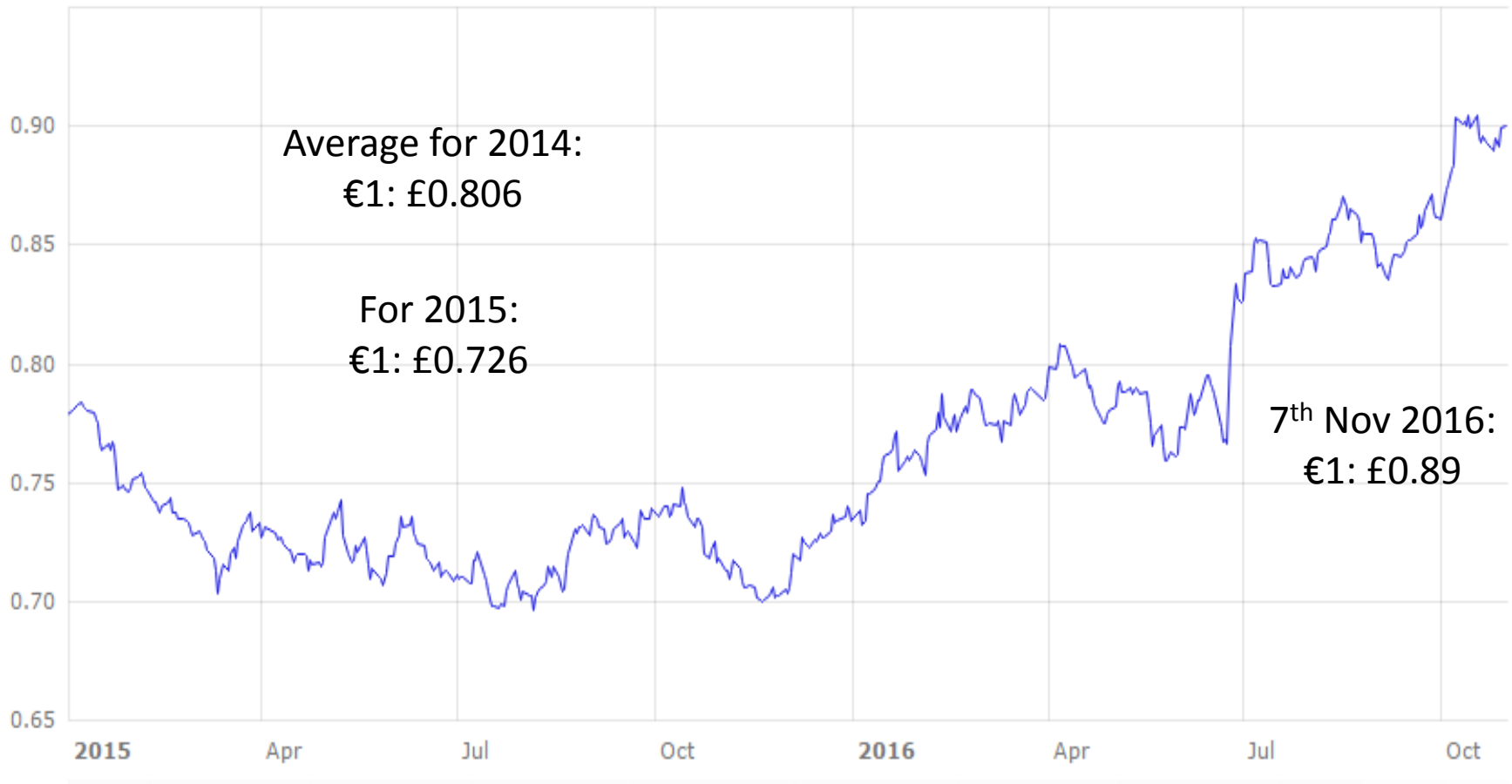
One in 3 will search out new markets

Two in 3 are looking at cutting costs & increasing prices

**Bord Bia Client Survey- 2016**

# Currency Exchange Rates

## Value of Euro in Sterling terms



# Bord Bia Brexit Response

- ✓ **Marketing Intensification Programme**
- ✓ **Currency/Negotiation workshops**
- ✓ **Consumer insight**
- ✓ **One to one meetings with buyers**
- ✓ **High level meetings with principal UK retailers**
- ✓ **Developing promotional activities in the UK**



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