

Bord Bia UK & Organic Activities

Stephanie Moe

3rd March 2016

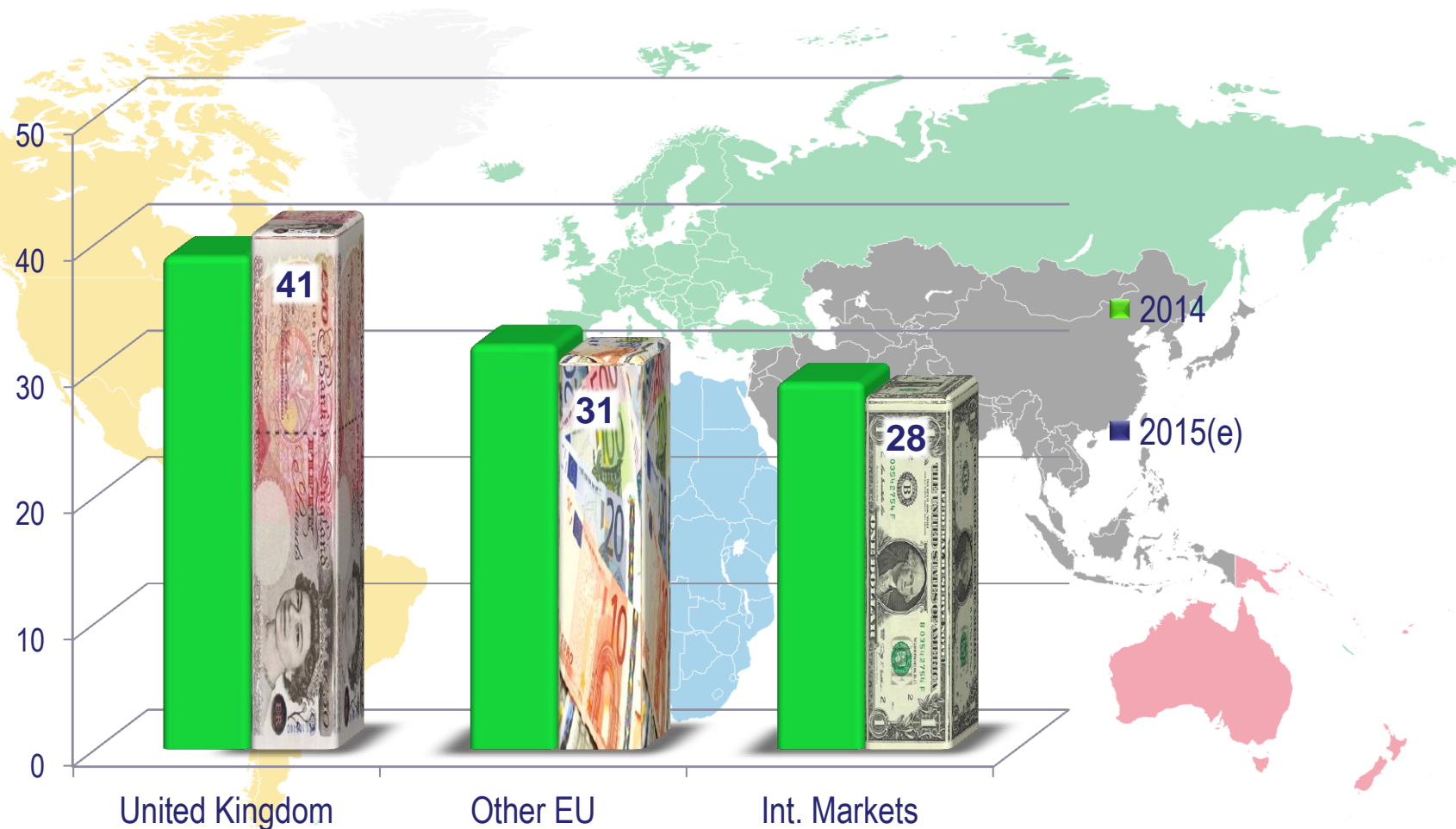


Working
with nature

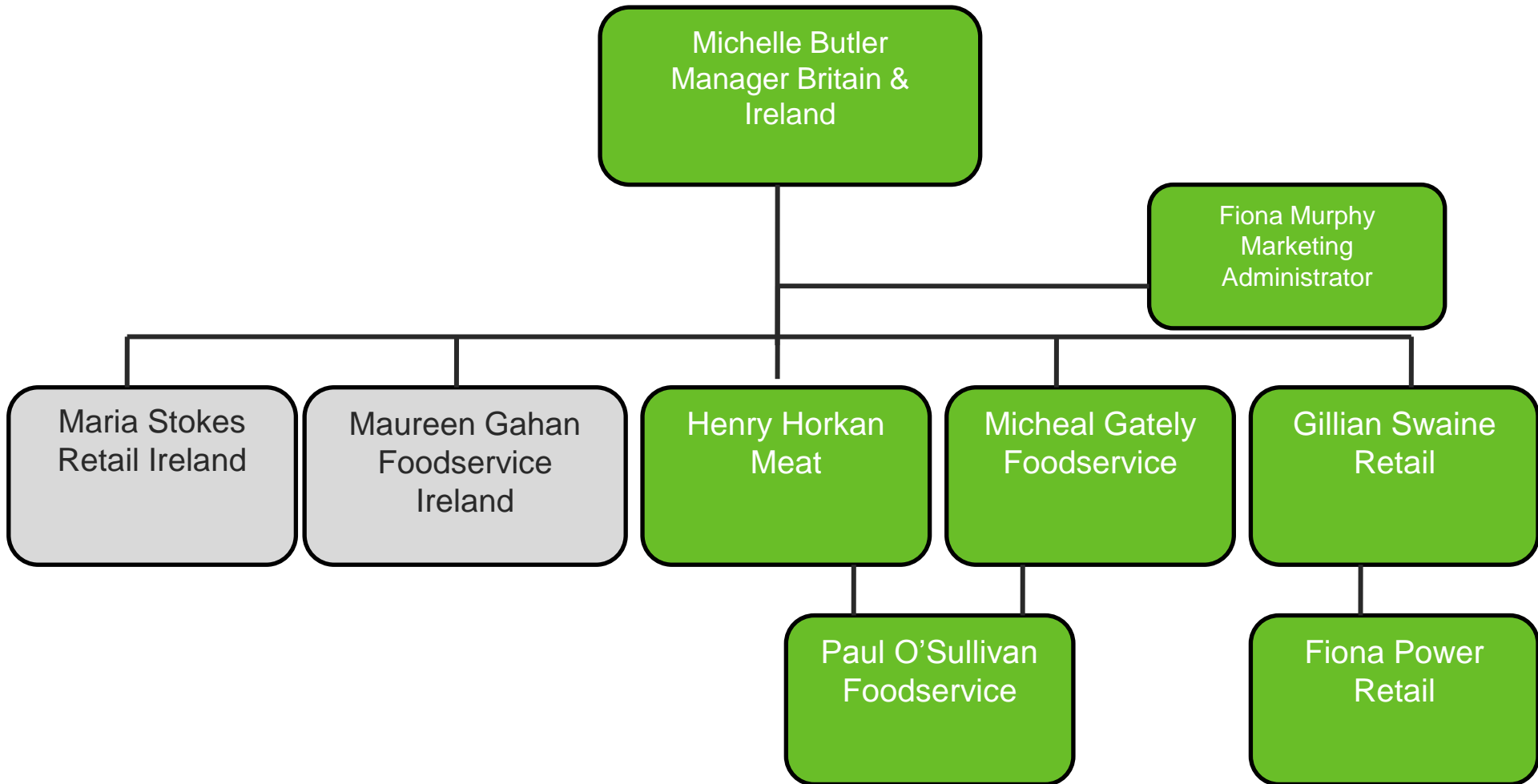
Bord Bia
Irish Food Board

UK MARKET & OFFICE ACTIVITY

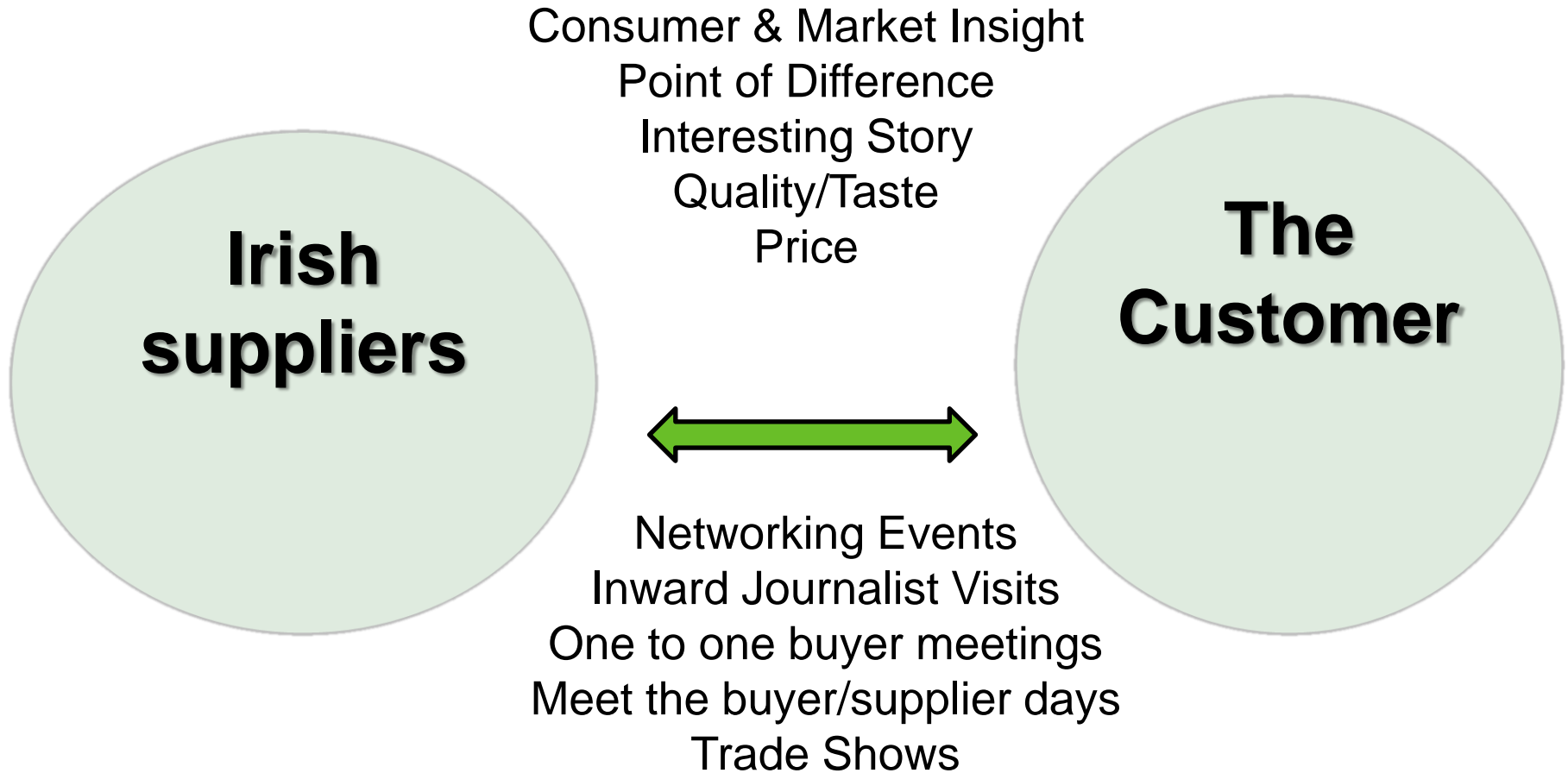
Largest export market with €4.4bn exports and growing 7% yoy



Our team



How do we make a difference?



UK Retail Landscape

- ✓ 4th largest retail market in the EU & 9th in the world
- ✓ Valued at £118bn v's an ROI retail market of £7bn
- ✓ Top 4 Multiples account for 70% - Tesco No. 1 - 29% market share
- ✓ However top 4 struggling – makes it challenging for Irish suppliers
- ✓ Growth coming from Convenience, Online & Discount channels
- ✓ Great opportunities for Irish food & drinks companies in the UK but requires a lot of hard work!

UK Retail Annual Plan 2016

Mission

To drive, through market insight, and in partnership with industry, the commercial success of a world class Irish food, drink and horticulture industry

UK Retail Programmes

No. of Programmes

3

No. of Companies

35

WHY SHOULD YOU BE PART OF THE RETAIL INTELLIGENCE PROGRAMME?

THE UK GROCERY MARKET IS WORTH
£118 BILLION



THE TOP FOUR MULTIPLES ACCOUNT FOR 70% OF THE UK RETAIL MARKET.



POPULATION OF 64 MILLION, IRELAND'S CLOSEST & LARGEST EXPORT MARKET.



9TH LARGEST GLOBAL GROCERY MARKET & 4TH LARGEST IN EUROPE.



SUITABLE FOR

- Companies looking to build knowledge of the UK market.
- Companies looking to access the latest market information and UK trends.



RAPIDLY CHANGING MARKET PLACE WITH AN INCREASING NEED TO KEEP UP TO DATE AND INFORMED.

KEY BENEFITS OF THE PROGRAMME



HELPS YOU TO UNDERSTAND THE DYNAMICS OF THE UK MARKET AND IDENTIFY CHANNEL OPPORTUNITIES FOR YOUR BUSINESS.



ACCESS TO THE LATEST UK MARKET INFORMATION AND RETAIL TRENDS.



DAILY AND WEEKLY UPDATES ON THE UK RETAIL MARKET.



MONTHLY RETAIL INTELLIGENCE REPORTS WITH RETAILER LIKE FOR LIKE SHARE DATA.



ACCESS TO BRAND VIEW PRICING AND PROMOTIONAL CATEGORY DATA.



CONFERENCE REPORTS FROM UK'S TOP RETAIL CONFERENCES SUCH AS IGD TRADE BRIEFINGS.



DETAILED PROFILES OF ALL THE MAJOR GROCERY RETAILERS IN THE UK ACROSS MULTIPLE, CONVENIENCE AND DISCOUNT CHANNELS.



TAILORED MARKET STUDY VISITS TO EXPLORE INNOVATIONS AND OPPORTUNITIES.



A KEY CONTACT WITH BORD BIA STAFF MEMBER TO GUIDE YOU IN MARKET
- FIONA.POWER@BORDBIA.IE



RETAIL INTELLIGENCE MEMBERS ARE PRIORITISED FOR TRADE BUYER EVENTS.

COST: €800 PLUS VAT

2016 UK RETAIL MARKET ENTRY PROGRAMME

PROGRAMME OVERVIEW

THE 2016 MARKET ENTRY PROGRAMME IS AIMED AT COMPANIES WHO ARE LOOKING TO ENTER THE UK RETAIL MARKET.

WORKSHOPS

THROUGH A SERIES OF WORKSHOPS, ONE TO ONE MENTORING AND BUYER EVENTS THE PROGRAMME WILL HELP PARTICIPANTS TO EXPLORE OPPORTUNITIES IN THE UK AND PROVIDE THEM WITH THE SKILL SET NECESSARY TO SUCCESSFULLY ENTER THE MARKET.

MENTORING

THE PROGRAMME WILL ENHANCE PARTICIPANTS KNOWLEDGE OF THE UK MARKET AND HELP COMPANIES TO DEVELOP BUSINESS ACROSS THE VARIOUS CHANNELS IN THE UK COVERING, MULTIPLE, CONVENIENCE AND ONLINE RETAIL.

BUYER EVENTS

ORGANISED THROUGHOUT THE PROGRAMME.



SUITABLE FOR

Companies looking to enter the market and need the support of UK focused retail workshops and expert mentoring to achieve their targets.

Companies with a product offering that will enhance the current range available in the market and offer the retailer a point of difference.

WHAT'S INCLUDED?



FULL ACCESS TO THE UK'S RETAIL INTELLIGENCE PROGRAMME



3 X UK RETAIL WORKSHOPS



BESPOKE UK RETAIL MARKET STUDY VISIT



5 X 2HR MENTORING SESSIONS WITH EX-RETAIL BUYER



PRIORITISED FOR UK RETAIL BUYER EVENTS

COST: €1,850 PLUS VAT

THE PROGRAMME WILL RUN FROM FEBRUARY - DECEMBER 2016

PROGRAMME OVERVIEW



The aim of this programme is to help you to win new listings in the UK.



Customer relationships and problem solving is a key part of the programme.



Mentoring based programme where you will be matched with a mentor to work alongside you and your business throughout the year to target new business listings in the UK.



SUITABLE FOR

- Companies looking to grow their business in the UK.
- Companies looking to target a new channel for growth.
- Companies looking to develop a solid export plan.

WHAT'S INCLUDED?

- Full access to the UK retail intelligence programme
- 5 x 2hr one to one mentoring sessions to work
- Minimum of 2 UK buyer meetings secured

All of our mentors are UK based with experience in either the FMCG industry or at senior buyer level with some of the UKs leading retailers such as Tesco and Sainsbury's.

OUR PANEL OF MENTORS

ADRIAN RIVERS

20 years Retail experience working as a buyer in UK retail multiples. Set up and operated his own frozen food company in Thailand supplying UK multiples and Foodservice companies. Extensive insight and understanding of the UK retailer's objectives and goals, understanding what the Retailer looks for in a potential supplier or product, as well as key experience of developing the Retailer's own label products and brands. Worked extensively with Irish companies in the past 10 years. Helped to bring many Irish brands to market in the UK to retailers such as Sainsbury's, Tesco, Morrison's, Waitrose, Ocado and The Co-operative. Provided mentoring support to start up Irish food companies as part of Bord Bia's Food Works programme for the last 3 years.

Buying experience includes Sainsbury's & Shell Europe.

DAVID POTTS

Well known and respected member of the food industry, with unrivalled experience and relationships with all major multiples and convenience retailers, throughout the UK and Ireland. "David's expertise in successfully developing both branded and private label business into the UK food retail arena is unsurpassed". David has over 30 years' experience both at CEO and Commercial Director level.

Experience Includes CEO NOM Dairies; Group Commercial Director, Dairy Farmers of Britain; Sales Director, Muller Dairies UK.

FINN COTTLE

Successful strategic leader within both the food and farming industry, with extensive experience of Buying, Marketing, Business and Product development within two of the UKs major supermarket groups as well as supplying into the supermarkets. Also experienced in food brand strategy, having mentored and worked with a number of successful brands now selling in key retail outlets in the UK, both within supermarkets and the independent trade

Experience Includes Noble Foods Marketing & Strategic Director; Somerfield Buying, Director-Fresh Foods; Sainsbury's, Senior Management – various fresh foods categories

HAZEL STRIDE

Accomplished retail professional with direct experience of buying ambient and chilled categories, category and technical management gained working for two of the UKs major multiple retailers Tesco and ASDA. Hazel has specific hands on experience of mentoring companies to gain, maintain and grow their business in the UK multiple retail market, specifically how to build stronger relationships with buyers, joint business planning and winning at tenders.

Experience Includes ; Selfridges Own Label Project Manager, Morrison's Change Management Consultant, Tesco UK Senior Buying Manager, Brand Manager and Retail Format Manager.

JOANNA WALKER

Joanna is a food retail expert with 16 years of experience gained from a broad range of roles including Buying, Product Development, Marketing as well as National Account Management, across a wide range of food categories including Bakery, Fresh Meat, Prepared Meals, Produce and Packaged Grocery at Marks and Spencer, Sainsbury's, Netto and a Bakery manufacturer. Experienced in managing categories worth over £400m in sales turnover, cost negotiation and leading tenders, developing numerous category and joint business plans and developing award winning private label products and has led marketing strategies and research plans aimed at delivering profitable growth.

Experience includes; Senior Buyer Sainsbury's, Marketing Planning Manager Sainsbury's, Business Planning manager Sainsbury's, Own label Product Development Manager Marks and Spencer, National Account manager.

SPECIALITY RETAIL - ANNUAL PLAN 2016



✓ Speciality Market valued at £9.2bn

✓ Includes:

Foodhalls, delis, farm shops, garden centres & speciality distributors

✓ **Bord Bia Programme**

- Speciality Seminars – 19.02.16 (Key note speaker, Harrods , Director of Food)
- Market Study Visits – April 2016 (Food & Drink Expo & NOPE)
- Trade Events – ‘Meet the Distributor’ – 26th April 2016
- Bloom Inward Buyer Visit – June 2016
- Speciality Fine Food Fair – Sept 2016
- Regular meetings with key buyers, Selfridges, Harrods, Fortnum & Mason & Speciality Distributors

Key Deliverables in 2016... UK Office

- ✓ Three retail programmes...35 companies
- ✓ Four Buyer Events - Amazon, Booker, Bloom, Distributor Event
- ✓ Five Market Study Visits
- ✓ Two Trade fairs, SFFF, LUNCH!
- ✓ Two UK Media events: 'Spirit of Sharing', 'Christmas in July'

ORGANIC ACTIVITY

Growing the success of Irish food & horticulture

2016 Activities

- ✓ Biofach 2016
- ✓ UK Market Profile & UK Market Study Visit
- ✓ Organic Client Mentoring
- ✓ Organic Meat Export Project
- ✓ Bloom 2016
- ✓ Supply Chain Development Visit –Netherlands
- ✓ Market Study Visit, Sana, Italy
- ✓ National Organic Awards
- ✓ Award-Winners: Branding and Design work

Biofach 2016

- ✓ Mail canvass sent to 300+ buyers in 4 languages
- ✓ Exhibitor booklet produced in English and German
- ✓ 10 companies (8 stands)
 - 3 meat
 - 3 fish
 - 3 prepared food
 - 1 dairy



Growing the success of Irish food & horticulture

UK Organic Market Study Visit

Day 1 – Monday 18th April

- ✓ Early Flight to London City
- ✓ NOPE Show in Excel (09.30-5pm)
- ✓ 20th year - 650 exhibitors, 50 countries. 10,000 visitors
- ✓ Focus on innovation
- ✓ Education/talks/workshops
- ✓ Live pitching session

Holland & Barrett

www.naturalproducts.co.uk



UK Organic Market Study Visit

Day 1 – Monday 18th April (continued)

✓ Hotel in King's Cross

✓ Group Dinner at the Duke of Cambridge

(Certified Organic Gastropub partnered with Riverford Organic)

The screenshot displays the Riverford Organic Farms website. At the top, the Riverford logo is on the left, and the text 'Riverford at The Duke of Cambridge' is on the right, with a navigation menu below it. A large image of a dish is featured, with a text overlay stating 'Britain's first and only Certified organic pub'. Below this, a section titled 'Riverford at The Duke of Cambridge' contains a paragraph about the partnership. To the right of this text is an 'Observer FoodMonthly Awards' badge for 'Runner Up 2015'. Further right is a 'booking a table at the duke' section with a photo of the pub interior and booking information.

Riverford
organic farms

Riverford at The Duke of Cambridge
menus | bookings | drinking | press & awards | geetie & guy | ethical business | contact

Britain's first and only
Certified organic pub

Riverford at The Duke of Cambridge

After 15 years of successful independent trading, The Duke of Cambridge organic pub has now teamed up with Riverford, the hugely successful family-run farm known for its organic veg box scheme and farm shops.

The Duke's founder, Geetie Singh, married Guy Watson, the man behind Riverford, in June 2014 and, perhaps remarkably, their businesses followed suit.

Observer FoodMonthly Awards
In association with Cuisinart
Runner Up 2015

booking a table at the duke

You can book a table at the Duke online or simply give us a call on ☎ 020 7359 3066.

UK Organic Market Study Visit

Day 2 – Tuesday 19th April

Store Visits Multiples & Organic Specialist:

- ✓ Sainsbury's
- ✓ Waitrose
- ✓ Wholefoods
- ✓ Planet Organic
- ✓ Daylesford Organic
- ✓ As Nature Intended



UK Organic Market Study Visit

Day 2 – Tuesday 19th April (continued)

- ✓ Lunch @ Daylesford Organic
- ✓ Heathrow Express
- ✓ Evening flight from Heathrow

(Option to visit Farm & Deli show and Food & Drink Expo in Birmingham – Wednesday 20th)



UK Market Study Visit



- ✓ **18th & 19th April:** 2-day London study visit tailored to Organic clients
- ✓ **Day 1:** Visit to NOPE show at ExCel (Trade only show)
- ✓ **Day 2:** Store visits. To include specialist and health-food stores, multiple retailers etc.



(Option to visit Food & Drink Expo combined with Farm Shop & Deli show in Birmingham -20th April)

Organic Client Mentoring

- ✓ 18 companies participated in 2015
 - Market entry level
 - Retail development level
- ✓ Additional elements in 2016:
 - UK market mentoring (8 companies)
 - Branding workshop

National Organic Awards

- ✓ July: canvass
- ✓ September: Judging
- ✓ October: awards
- ✓ UK judge to be invited
- ✓ 6 Categories:

(Product) Best Fresh, Best Processed, Best New

(Business) Export Award, Innovation Award, Direct Selling Award

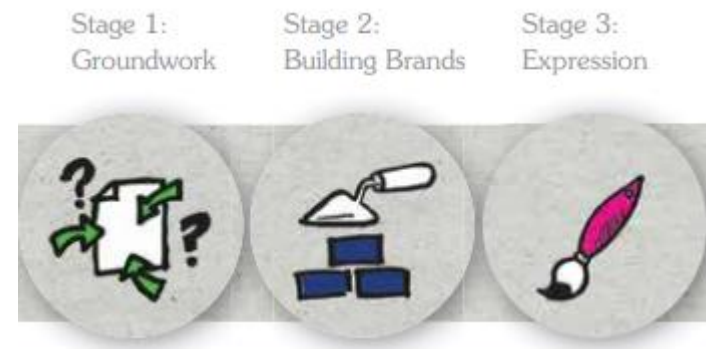
- ✓ Possible buyer showcase (UK)



Award-Winners: Branding and Design work



- ✓ Tailored prize for each of the 6 winners
- ✓ Extensive work on brand to include syndicated consumer focus groups to test concept and brand development work with design agency (1 product)
- ✓ 3 x completed in Q4, 2016
(3 x in Q1 2017)
- ✓ Value per company: €30,000



Organic Meat (Lamb) Export Project

- ✓ Key focus markets and priority activities dependent on best trade opportunities
- ✓ Good interest at Biofach
- ✓ Activities agreed in principal:
 - Inward Buyer & Media visits
 - Branding & pack development
 - In market launches & events
 - In-Store tastings
 - Trade ads in export markets
 - Social Media/Online
 - New market Study Visit (ex: Mid-East)



Bloom 2016 , 2nd-6th June

- ✓ Organic School Garden planned once again
- ✓ Over 30 schools visited in 2015 over Thurs & Fri
- ✓ Additional Organic Farming/Food Feature is tbc.



Supply Chain Development Visit – Netherlands

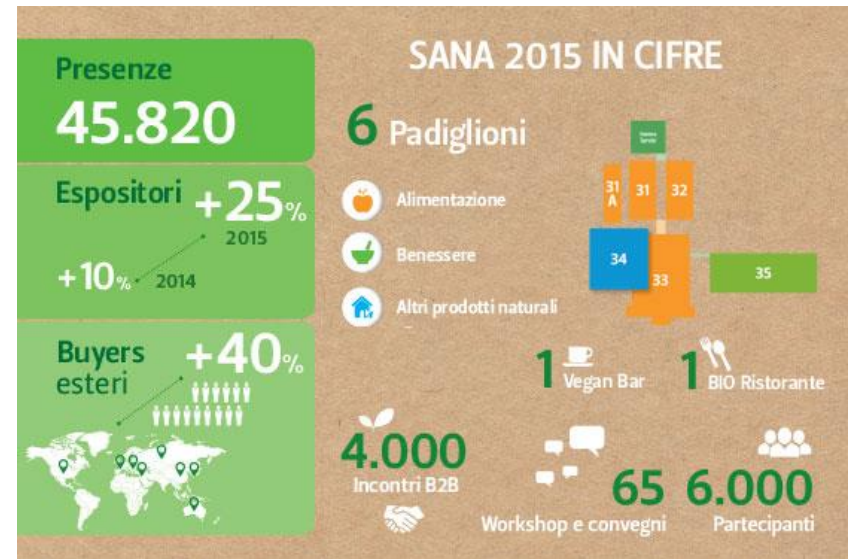


- ✓ Tailored for organic horticulture sector looking to scale
- ✓ Learn from best practice in place in Netherlands : production models & logistics
- ✓ Trip coordinated by Bord Bia & horticulturalist with local market contacts
- ✓ Trade engagement to include meetings and presentations



Market Study Visit, Sana, Italy

- ✓ Italian organic retail market worth over €2.1bn in 2014 and growing
- ✓ Sana show, main organic show in the market. Grew in 2015, increasing international interest.
- ✓ Visit to incorporate show, multiple retailers, small & large specialist stores =75% of organic sales



salone internazionale del biologico e del naturale

Bologna
9 - 12 Settembre 2016

Next Steps

- ✓ Read the full report in detail
- ✓ Further research on potential targets/ distributors
- ✓ Sign-Up for Market Study Visit 18-19th April (limited spaces)
- ✓ Organic Mentoring: UK & Domestic Market
- ✓ Engage with Bord Bia
 - Information Department
 - Me/Sector Managers
 - London Office

For more information:

info@bordbia.ie

**For today's presentations the full report and to register for Market Study
Visit:**

www.bordbia.ie/events

Stephanie.moe@bordbia.ie

Q & A

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board