

Capturing Value in Europe

Noreen Lanigan, Regional Manager Europe & North America
Emmet Doyle, Organic Sector Manager

January 19th 2024

BORD BIA
IRISH FOOD BOARD





Agenda



Evolving landscape



Measuring Impact in 2023



Hero campaigns in 2024
PGI, Organic, CIBC



Future-proofing marketing
strategy



EUROPE

Meat and live exports value 2023

Source: Bord Bia

Total value of meat exports to EU27

€2.1
BILLION

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Beef and beef offal exports

€1.38
BILLION

↓2%



Sheepmeat exports

€324
MILLION

↓7%



Live exports

€93.5
MILLION

↑20%



Pigmeat exports

€93
MILLION

↓7%



Poultry exports

€53
MILLION

↑55%





Changing demographics



“Deconsumption”



Climate change hitting home

Geopolitics



Trust & Regulation

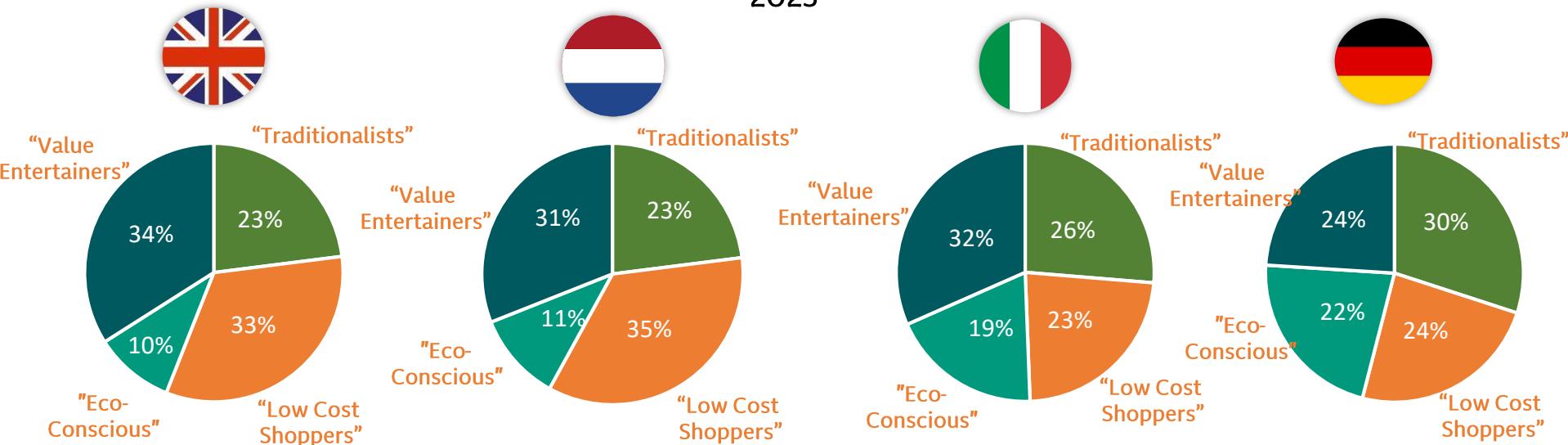
Measuring Impact in 2023

BORD BIA
Thinking
House



Irish beef shopper profile varies by market

(Base: All adults aged 18+ who have ever bought Irish beef)



Record brand performance in key markets

2023
2019

(Base: All past 4-week buyers of Beef)



Preferred Source

13%

7%

Buy Regularly

31%

25%



16%

12%



10%

4%



11%

5%

Ever Purchased

52%

45%

45%

36%

36%

18%

Prompted Aware

77%

66%

75%

60%

65%

37%

Spontaneous Aware

61%

58%

64%

40%

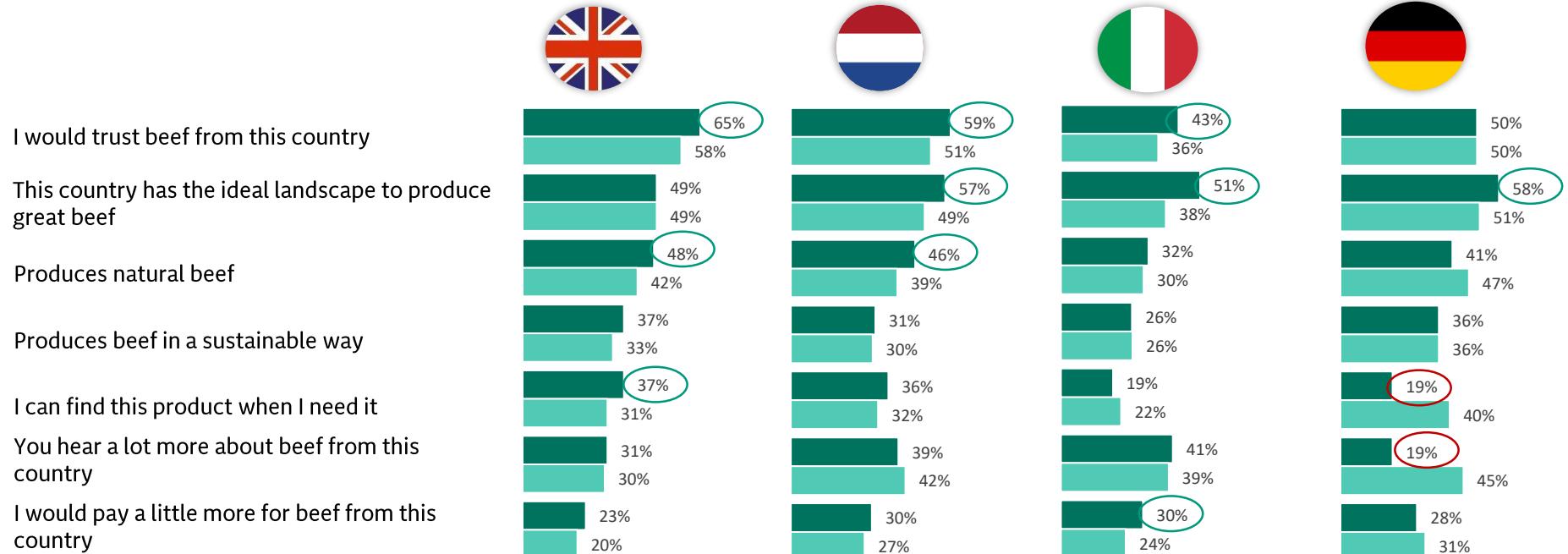
35%

14%

Strong brand credentials

2023
2022

(Base: All past 4-week buyers of Beef)



Strong customer awareness

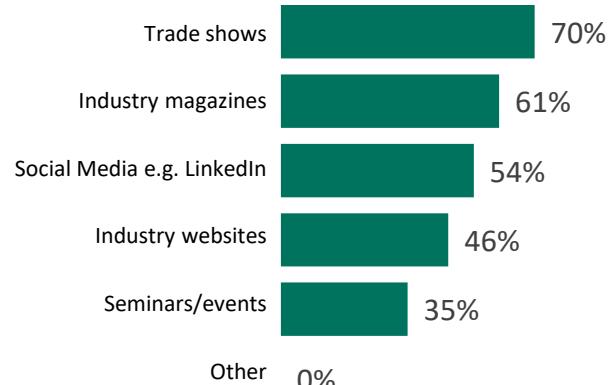
(base: All Survey Participants n=141, source: Bord Bia Customer Survey 2023)

Incidence of seeing a Bord Bia B2B ad in the last year



Where did you see this advert?

(base: All that saw Bord Bia ad n=71)



Did the advert influence you to seek out further information?
(base: All that saw Bord Bia ad n=71)



2022
60%





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Promoting Irish Beef and Lamb in
Europe 2023

Hero Campaigns Europe 2024

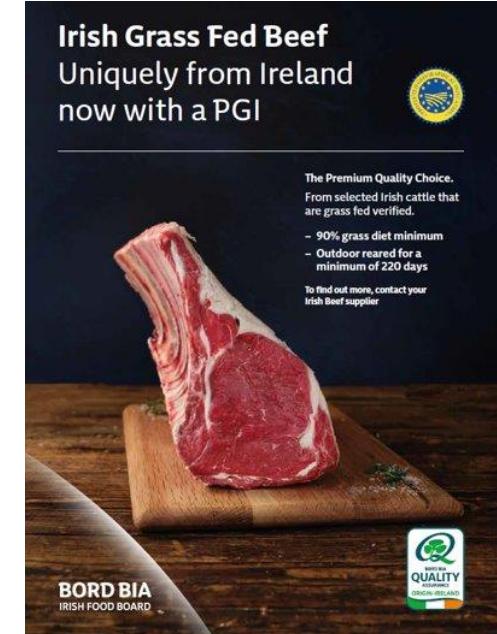
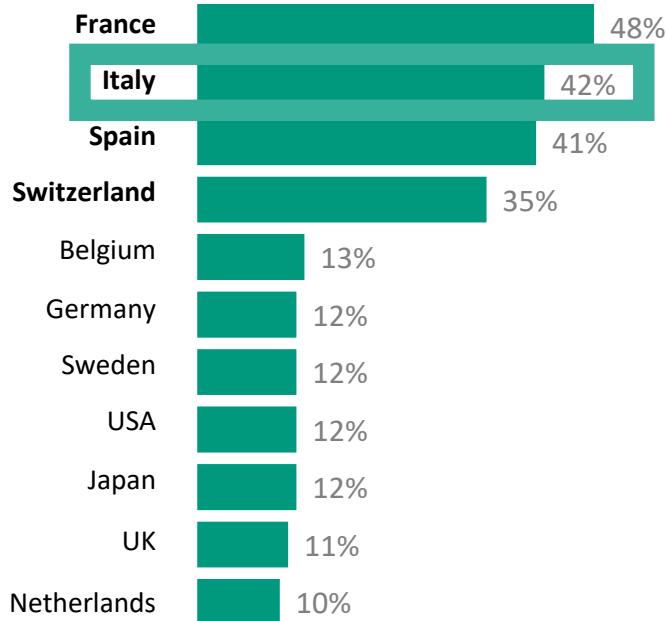


Irish grass fed beef PGI Launch

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PGI awareness informed strategy



Irish Grass Fed Beef
Uniquely from Ireland
now with a PGI

The Premium Quality Choice.
From selected Irish cattle that are grass fed verified.

- 90% grass diet minimum
- Outdoor reared for a minimum of 220 days

To find out more, contact your Irish Beef supplier



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Asset Development

Launch event Italy

Tier 3

EU B2B media campaign

B2C campaign Italy

Tier 2

Customer Activation

Inward Buyer & Media Visits

Tier 1



Where to play, how to win?

Worth paying more for: 41% of Italian consumers

(Base: n=488)



Grass-fed verified 42%

Protected Geographic Indicator (PGI) 41%

Local Beef 41%

Organic 40%

Quality Assured certifications 38%

Suckler Beef 35%

Angus beef 27%

Hereford beef 12%

None of these 5%



Irish Organic Focus

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The Growth in the Irish Organic Sector

Irish Examiner

Over 2,000 new farmers confirmed for Organic Farming Scheme this year

This week they will receive their approval providing them with a five-year contract commencing on January 1, 2023.

2023



Reaching 10% of all land farmed organically by 2030 is "hugely ambitious", but there is "real progress" being made already, Ms Hackett said.

Irish Independent

Over 1,000 farmers apply for Organic Farming Scheme in latest round

2024



Minister of State Pippa Hackett.

Sector Snapshot *

- 5% agricultural land is being farmed organically (2020: 1.5%)
- 5,000 farmers in the Organic Farming Scheme
- 85% of farmers are from the livestock sector

2030 Sector Forecast *

- Organic beef production set to increase fourfold
- Organic lamb production set to increase sixfold
- Exports to account for 75%+ of production

*Industry Calculations

2024 Organic Export Market Research



Objective

- Define The Export Opportunity
- What's The Current Trade Awareness
- Develop B2B Export Proposition
- Understand Latest Consumer Trends

Methodology

| Industry Analysis | Consumer Perspective | The Buyer's Voice |
|--|------------------------------------|------------------------------|
| Social Listening | 1,500 Consumers Per Market | In Depth Customer Interviews |
| Interviews With Organic Industry Experts | Ethnography For Further Deep Dives | Buyer Surveys |

Deliverables

- Export Market Prioritisation & Implementation Plan
- 7 x Organic Market Reports
- Insights To Support Trade Opportunities
- Engaged Customer Network

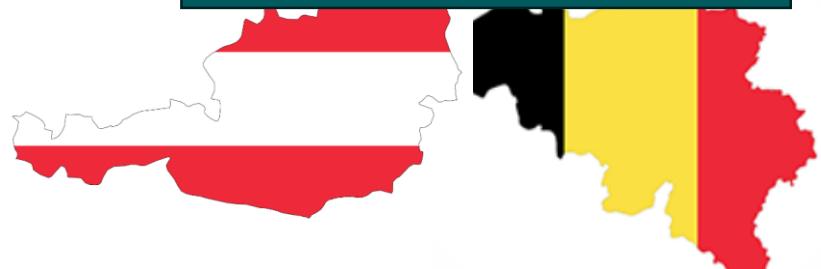


EU ORGANIC BEEF & LAMB

PASTURE RAISED IN IRELAND



B2B Information & Education Campaign



Meat Academy

16 x In Market Events

Education & Inspiration

Trade Shows

Bio Austria x 2
Nordics Organic Fair x 3
Natexpo x 1

Inward Visits

12 x Inward Study Visits

Seeing is Believing

B2B Marketing

B2B Advertorials
B2B Content
New Website

CHEFS' IRISH BEEF CLUB

20TH ANNIVERSARY



Content for own, earned and bought media





**CHEFS' IRISH
BEEF CLUB**
20TH ANNIVERSARY

CIBC Jubilee Programme

12th - 15th May 2024

- 80 Michelin-star & equivalent chefs
- From 8 markets, in Ireland for 4 days
- 20 years voluntary endorsement
- Deliverables:
 - Continued commitment from the 80 members
 - Content generation (testimonials, recipes)
 - Full Irish beef portfolio (PGI, organic, breeds)
 - Bought and earned media placements



Futureproofing marketing strategy

EU Regulating substantiation

Empowering
Consumers
for the Green
Transition

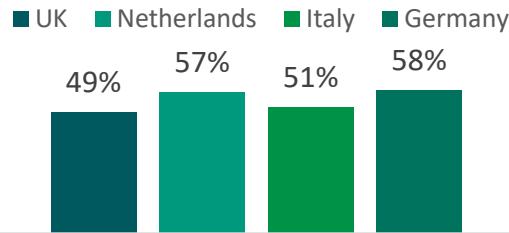
#EUGreenDeal



Audience & media-led planning

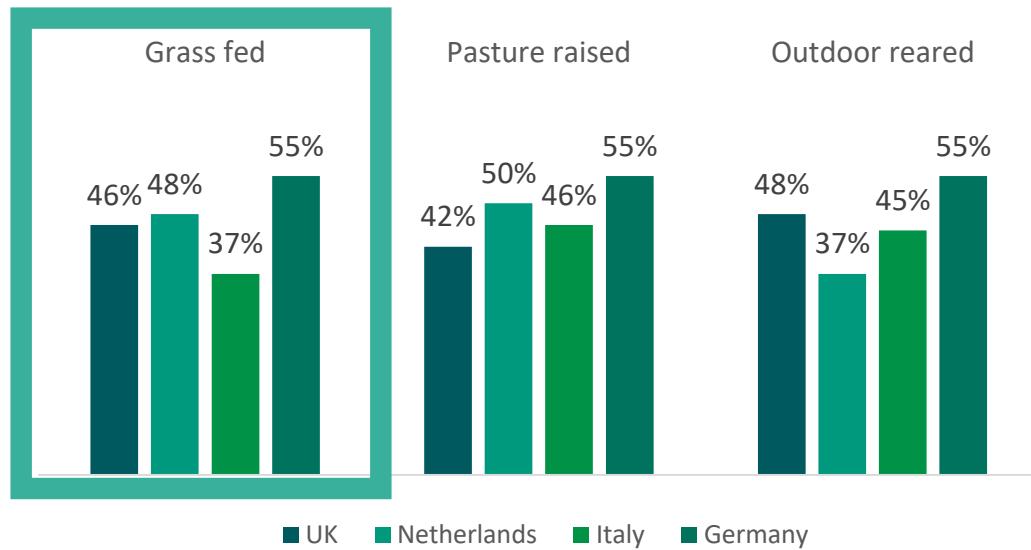


Grass-fed proof-points exclusively linked to PGI



This country has the ideal landscape to produce great beef

Irish beef is also associated with being European, but it is not necessarily a point of difference, since the domestic products are much more associated with this attribute, as well as with being local.



Strategic Review of Lamb Campaign

Bord Bia - The Irish Food Board
Promoted • Food and Beverage Services

Irische Lammfleisch aus Weidehaltung – einzigartig zart im Geschmack. Treffen Sie unsere Lieferanten.



Treffen Sie unsere Lieferanten:
irishfoodanddrink.com/irish-lamb

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Starten Sie mit Lamm aus Irland in die neue Saison.

[Learn more](#)



Irisches Lammfleisch in Gourmet-Qualität

Naturlich nachhaltig:

- ✓ 99% familiegeführte Farmen mit kleinen Herden
- ✓ >300 Tage auf offenen Weiden grasende Lämmer
- ✓ Bis zur Geburt rückverfolgbare, transparente Lieferketten
- ✓ Unverwechselbar zart-aromatisches Fleisch dank gezaubelter, nährstoffreicher Ernährung

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Unsere Produzenten finden Sie auf:
irishfoodanddrink.com/irisches-lammfleisch



Vi är redo att producera mer kött

Lars Appelqvist, vd för IFLKAN, berättar om att de finns sällan sågs tidigare över på alltting att producera mer kött. Detta beror på att det inte finns politiskt intresse för att producera mer kött i Sverige.

Beställ nu!

Betesuppfödda lamm med unik smak och karraktär

Boucherie-Volaille

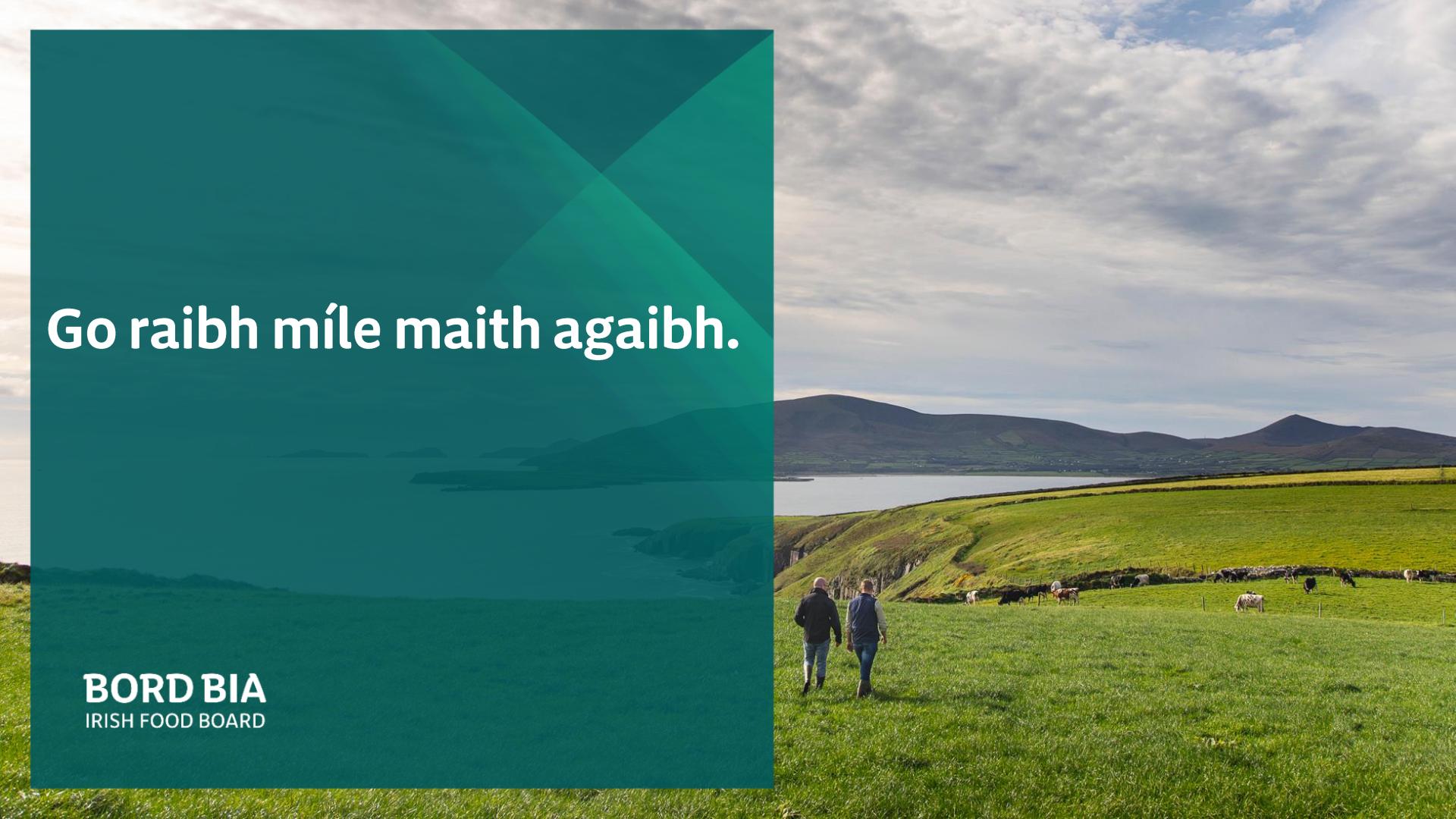
Rayon trad

Comment préparer les heures creuses ?

Étapes de préparation des heures creuses

Commandez l'agneau irlandais de printemps cet été

Commandez l'agneau irlandais de printemps cet été



Go raibh mile maith agaibh.

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