

An aerial photograph of a vibrant green landscape. A winding river or stream flows through the center, bordered by lush vegetation and small trees. The surrounding fields are a deep, healthy green, suggesting a rural or agricultural setting. The overall scene is bright and natural.

Priorities for Irish Dairy in China-2022

15/11/2022

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Agenda

- Irish dairy exports to China
- 3 Years Strategy
- What we have done in 2022?
- What's Next in 2023?

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Ireland Dairy Exports to Wider China (2019-2021)

While dairy category is generally performing well, IMF drags figures down

Since 2019

-17%

total

-31%

IMF

+28%

other dairy

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Dairy exports to Wider China



Source: CSO, wider China refers to mainland China, Macaw, Hongkong and Taiwan.

2022 Ireland Dairy Exports to Wider China(Jan-Aug)

€ 326 million

Value: +4% YOY

€ 326million

Volume: -17% YOY

60 thousand MT

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2022 Ireland Dairy Export to Mainland China(€)



Source: CSO, wider China refers to mainland China, Macaw, Hongkong and Taiwan.

Irish Dairy exports to Wider China(2017-2021)

Cheese 5x



Milk + Cream 4x



Butter 7x



Casein 44x



Source: CSO, wider China refers to mainland China, Macaw, Hongkong and Taiwan.

Irish Dairy in China

3 year plan 2022-2025



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ONE Bord Bia

Core Strategic Questions

for Dairy in China

1: Retain

- ✓ engagement with existing and new market customers
- ✓ Insights, governmental policies

2: Premiumization

- ✓ Science technology , innovation drive, RD collaboration
- ✓ Sustainability and Grass-Fed credentials
- ✓ Explore opportunities on specialized nutrition or value added ingredients.

3: Recruit

- ✓ Channel diversification and management
- ✓ Reputation



Champion Insight Led Innovation and Brand Development

China Insights Projects

- BordBia projects
- Co-funded projects

Client Insight Services

- Market seminars
- Market newsletters
- Client Presentations

✓ **What have we done this year?**

20 | 22

2022 Market Activity Overview

8th June

Dairy and Health Webinar

25th July

Hainan consumer goods EXPO

8th Aug

Dairy distributor event- Wuhan

25th Aug

Food and Drink Future Ecosystem Summit-Shenzhen

5th Sep

DAC exhibition and conference



2022 Market Activity Overview

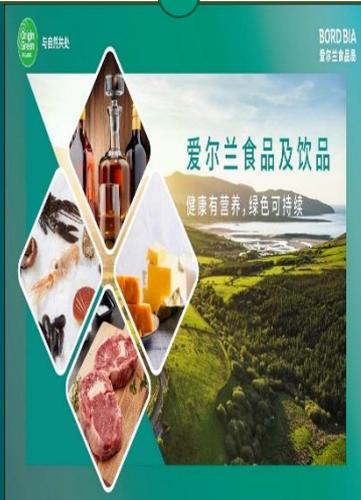
4th Nov

Dairy distributor
event-Shenzhen



5th Nov

CIIE Cloud
Pavilion



28th Nov

CDIA
exhibition



9th Dec

SIAL global dairy
forum



WEAVING EMOTIONAL & FUNCTIONAL MESSAGES IN STORYTELLING

翡翠绿岛，纯粹之地，珍饈之源
Jade island, supreme country of origin brings world-class agri-produce

Country of Origin

- Supreme natural environment
- Modern agriculture built upon traditions passed over generations and advanced technology

Quality & Food Safety

- EU Food Safety Standard
- Quality assurance schemes

Value

- 2B: Adaptability and versatility in Chinese cuisine, profit margin
- 2C: Nutritious, safe and tasty

Strengthened awareness building with carefully weaved messages & brought communications from Corp level to Sector level



绿岛瑰宝，“乳”此匠心

- Origin Green
- Grass-Fed standard
- Health & Nutrition



“爱”牛中烹，天赐滋味

- Grass-fed standard
- Award-Winning Beef
- Cuts befitting Chinese cuisine



海之鲜，“爱”之味

- Pristine water
- EU Food Safety Standard
- Responsibly sourced seafood

EMOTIONAL

FUNCTIONAL



Communications Overview 2022

Trade Shows



- Hainan Consumer EXPO
- CDIA dairy exhibition
- DAC dairy exhibition

Campaigns



- Trade gathering-Wuhan
- Trade gathering-Shenzhen
- Bakery KOL campaign
- KOL Farm visits
- Ambassador's Kitchen
- Specialized nutrition media campaign

Speaking opportunities



- Dairy and Health Webinar
- Food and Drink Future Ecosystem Summit
- Global Dairy forum-SIAL
- Global Dairy forum-SIAL
- 2022 World Agri-Food Innovation Forum

Communications Reach out

In 2022, we engaged with media, KOLs, experts through independent or cooperative ways to generate awareness for Irish dairy, premiumize our reputation and retain the business.

Education Piece



Education piece will highlight the USPs of Irish dairy, leading trade media or dairy experts, commercial KOLs, nutritionists were pitched to drive awareness for Irish dairy and grow our reputation at country level.

Chef Engagement



Working with chef KOLs to demonstrate the attributes of Irish dairy products, develop recipes tailored to regional cuisine culture elements, activate foodservice and bakery channels.

Speaking opportunity



Invited to speak at agri-food and dairy focused industry seminars and conferences, wider groups of target audiences will be reached out.

What's Next for 2023?

- ✓ **Market Premiumization**
Building wider and deeper awareness & reputation for Irish dairy at 2B, 2C and 2G level.
- ✓ **Business retain and recruit**
online & offline activities & promotions



2024
2023
2022

Drive new business with emerging specialised nutrition manufacturers



Children's Nutrition

500 active brands
¥50bn market value, 40% growth in 2020



Senior Nutrition

¥20bn market value, 98% growth in 2020



Sports Nutrition

¥3.8bn market value, 30% growth in 2020

Conclusion: a period of rebalancing

- ✓ Support Irish companies with innovation initiatives
- ✓ Diversification
- ✓ More in-depth customer engagement and stronger proof points

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Summary and Strategic Options

- China plays an important role for Irish Food & drink industry. Dairy, meat and seafood form the backbone of the strategic relations between two industries.
- Ireland ranks the 6th dairy export countries to China this year.

Strategic Options:

- Trade and consumers education will be needed
- Develop and activate the distribution network
- Provide technical and marketing support
- Stable product supply will be needed.
- Keep good relationship with government will be necessary.
- Timely response and follow up is necessary.
- Price will be very relevant but not the only feature