

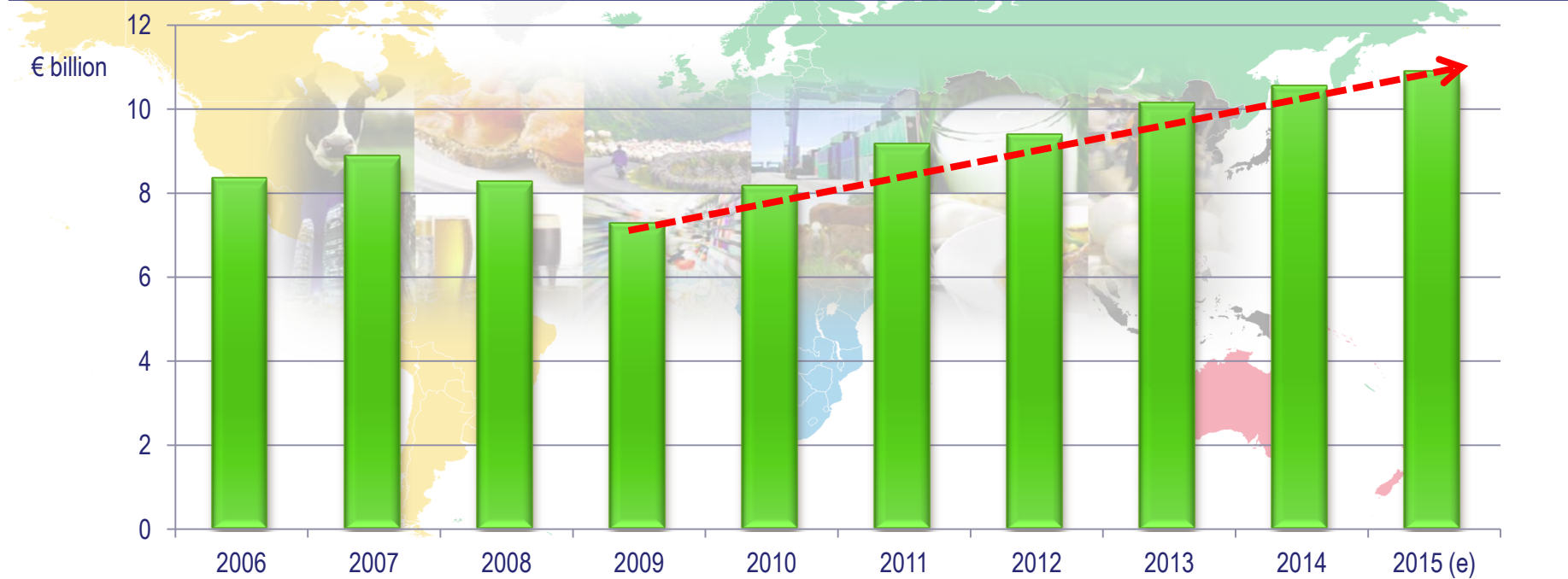


Building Preference for Irish Food & Drink

Jim O'Toole
Bord Bia

2015 Export Performance

€M	2014	2015(e)	% Change
Food, Drink & Horticulture Exports*	10,470	10,825	+3

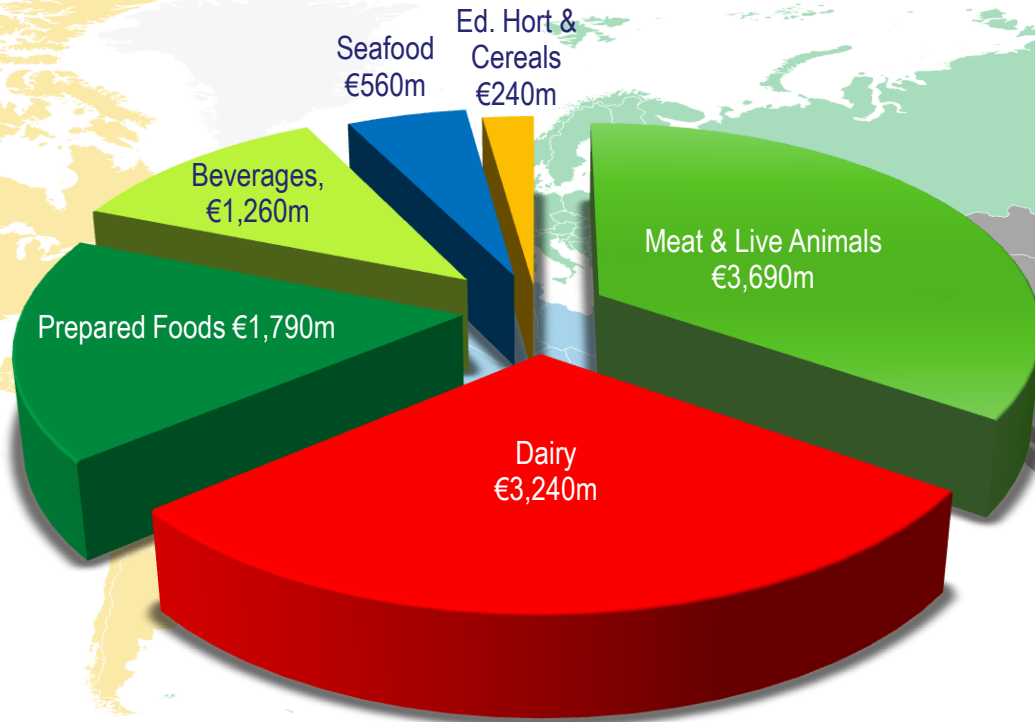


Growing the success of Irish food & horticulture

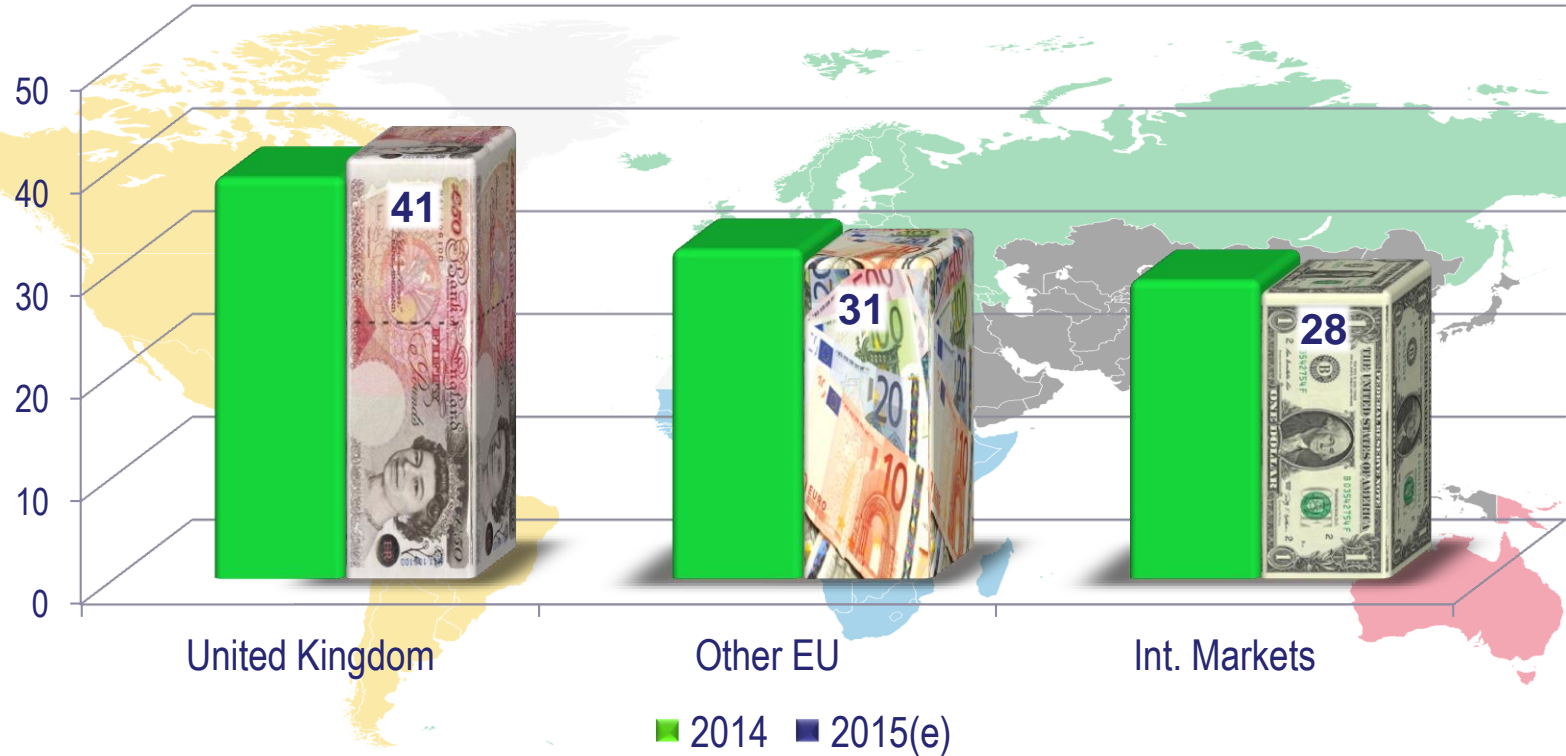
Performance by Sector

Sector	€M	2014	2015 (e)	% Change
Meat & Live Animals		3,625	3,690	+2%
Dairy & Ingredients		3,105	3,240	+4%
Prepared Foods		1,810	1,790	-1%
Beverages		1,150	1,260	+10%
Seafood		540	560	+4%
Horticulture & Cereals		230	250	+9%

Export Performance 2015



Distribution of Food & Drink Exports (%)



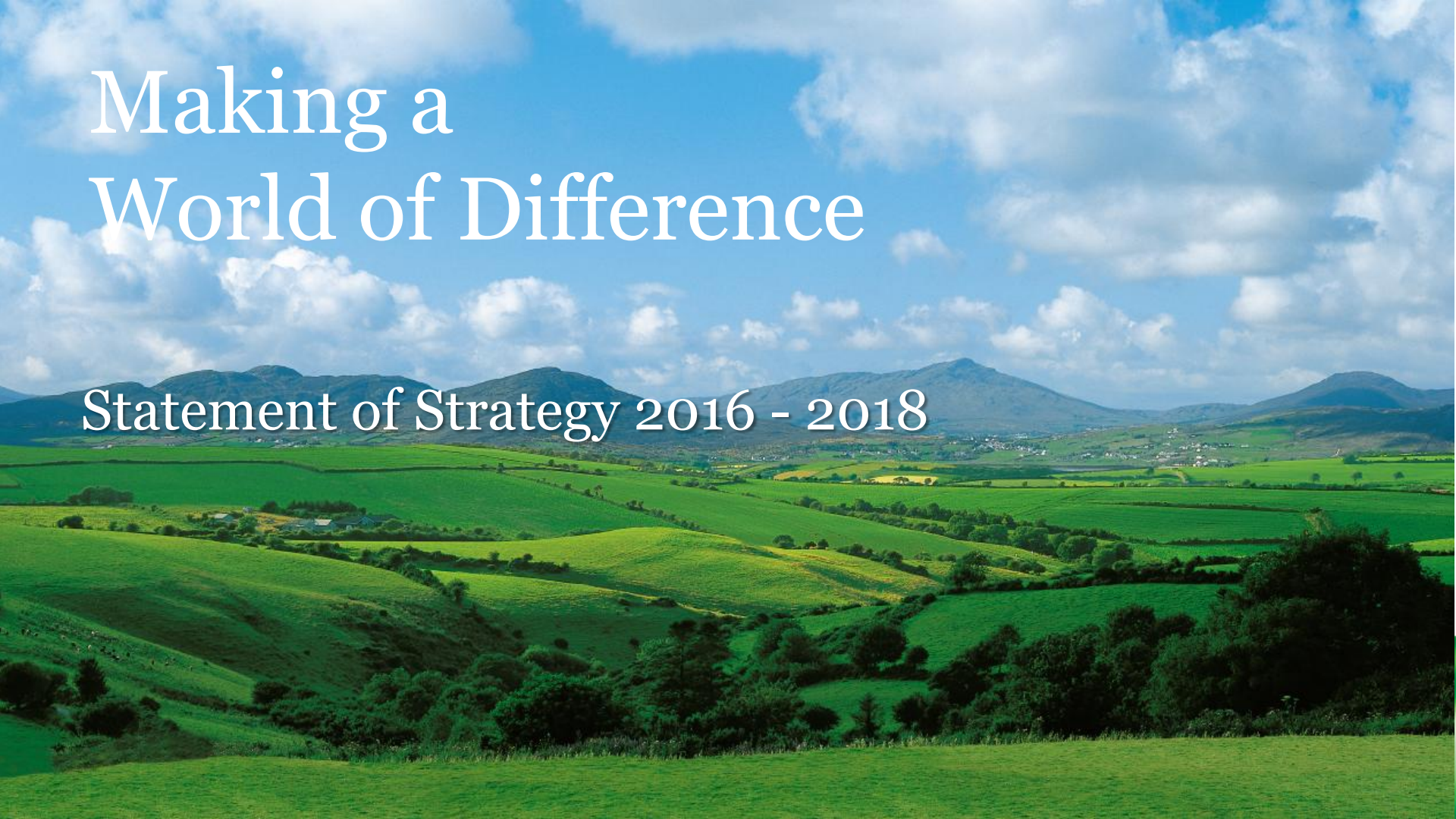
Mission Statement

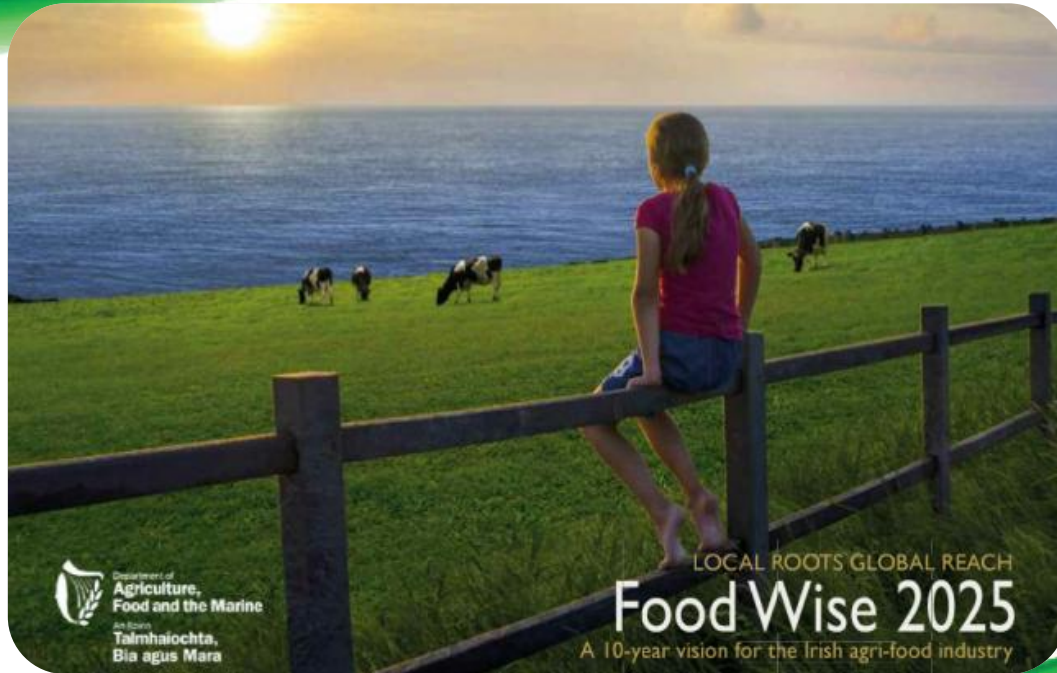
A woman with long reddish-brown hair, wearing a dark jacket and a light-colored scarf, stands in a field of tall, golden-brown grass. The background shows rolling hills under a dramatic, cloudy sky with patches of sunlight.

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

Making a World of Difference

Statement of Strategy 2016 - 2018



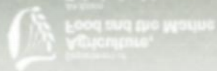



Department of
Agriculture,
Food and the Marine
An tSeán
Talmhaíochta,
Bia agus Mara

LOCAL ROOTS GLOBAL REACH

Food Wise 2025

A 10-year vision for the Irish agri-food industry



Mirrored text: LOCAL ROOTS GLOBAL REACH, Food Wise 2025, A 10-year vision for the Irish agri-food industry

Strategic Pillars

An aerial photograph of a lush green valley with rolling hills and a small pond in the foreground. The background shows distant mountains under a clear blue sky. The text is overlaid on the image in a white, serif font.

Informed by consumer insight

Enabled by valued people, talent and infrastructure

Underpinned by Origin Green

Realised by effective routes to market

Supported by strong brand communications in the digital age

Informed by Consumer Insight

The Thinking House: The Bord Bia Insight Centre



Inspired by global best practice, tailored to meet the unique needs of our own indigenous industry

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board



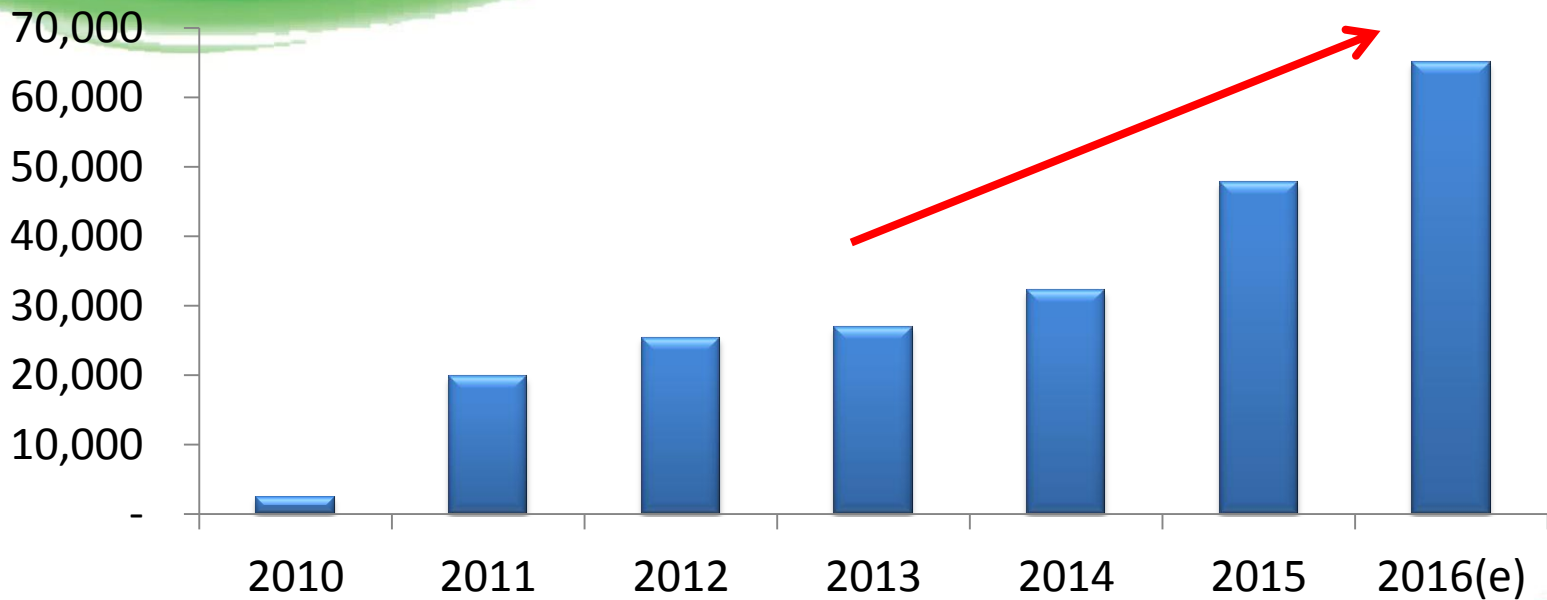
Realised by effective routes to market



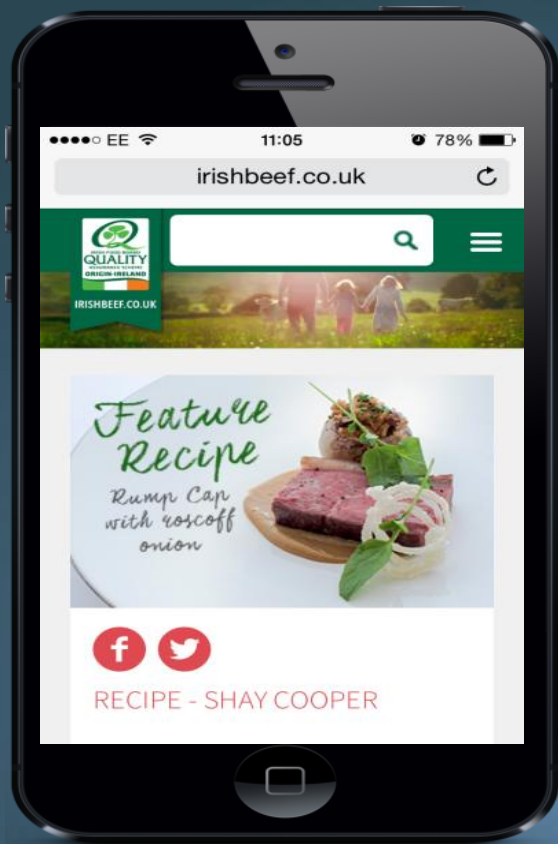
Growing the success of Irish food & horticulture



Irish pigmeat exports to China



Brand communications in the digital age



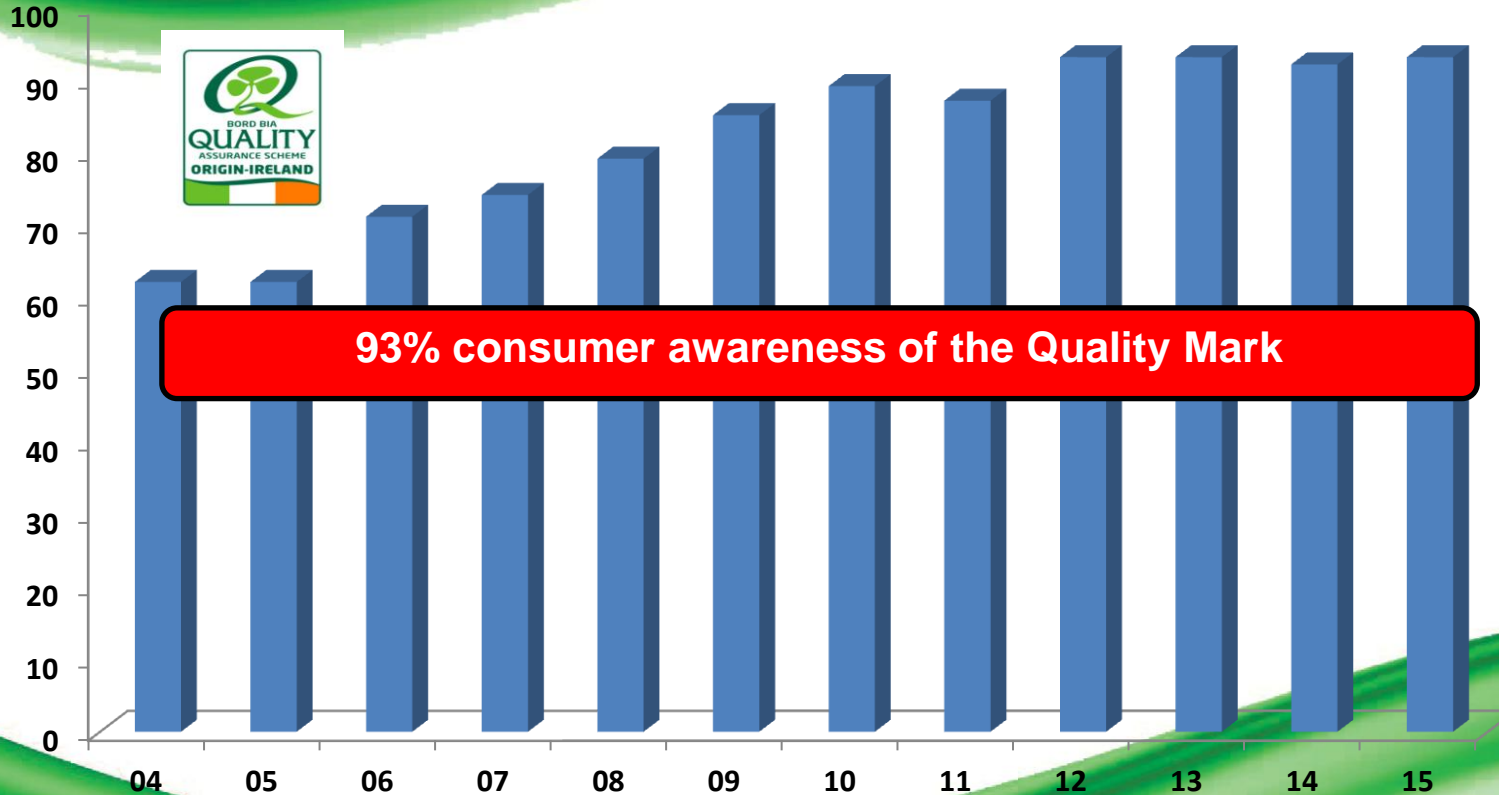


Your food is our passion

Bord Bia
Irish Food Board

bordbia.ie

Consumer awareness is strong



Impact on Purchase decision



As a result of seeing the Quality Mark, 84% of consumers are more likely to purchase a Bacon & Ham product (Source: RED C)



Working
with nature

A World Leader in Sustainability

Everyone on the journey...

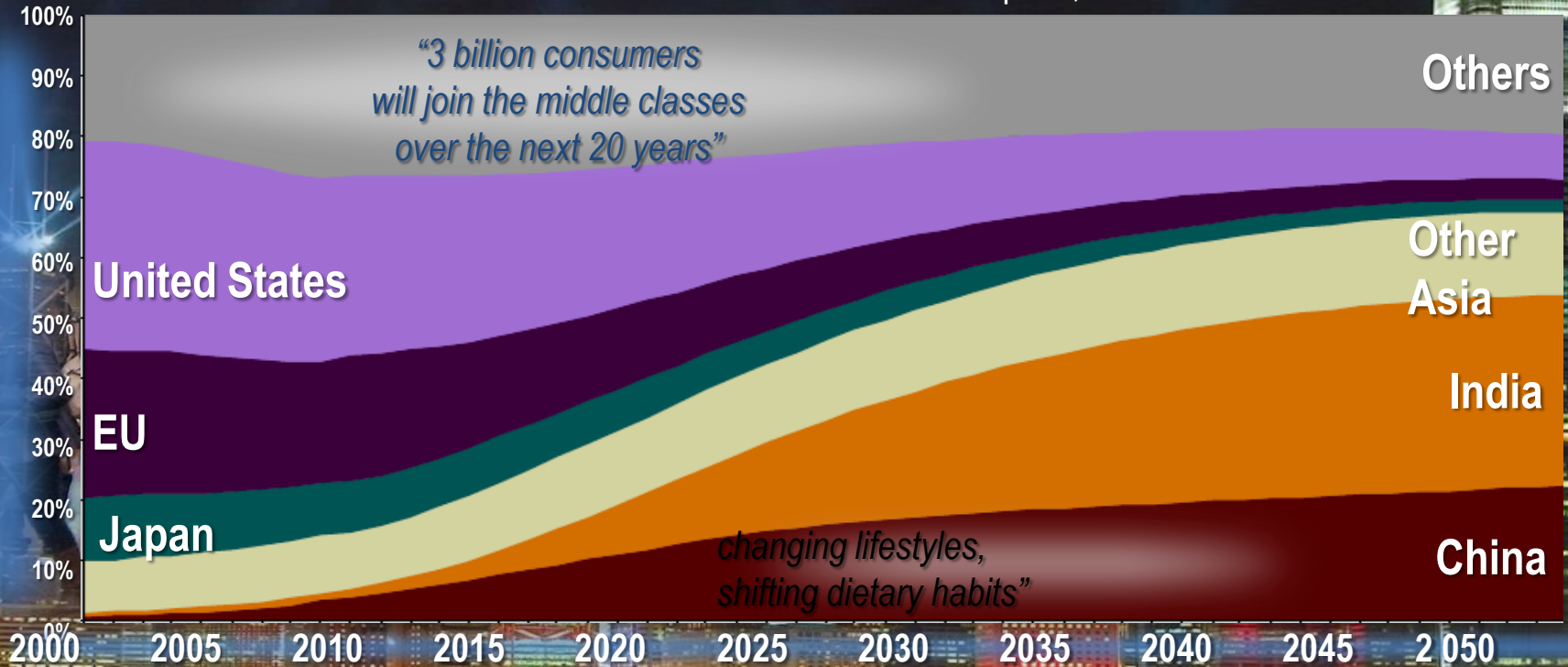
Measuring what matters...

International Standards...

Continuous Improvement...

India and China Make Waves in the Global Middle Class

Shares of Global Middle Class Consumption, 2000-2050



Source: OECD Working Paper



Growing the success of Irish food & horticulture

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Irish Food Board



The Irish Agricultural Cereals Board

Sustainability Trade Research Study

November 2009



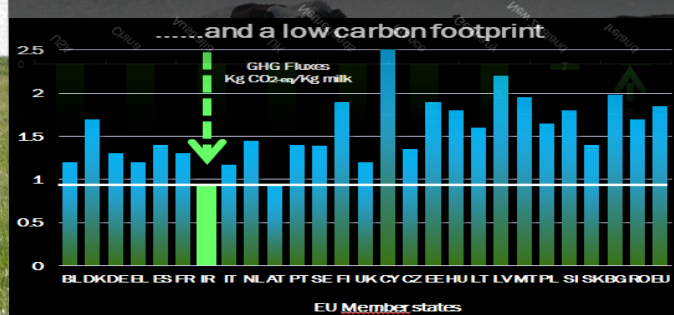
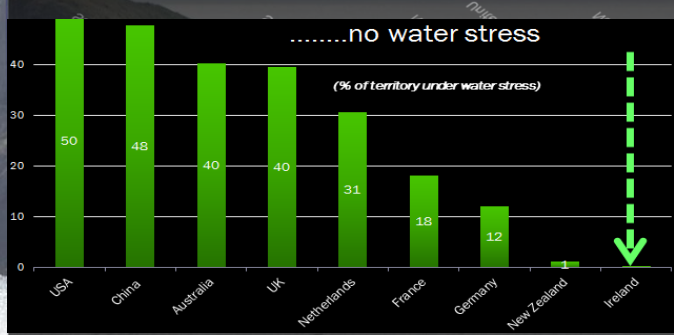
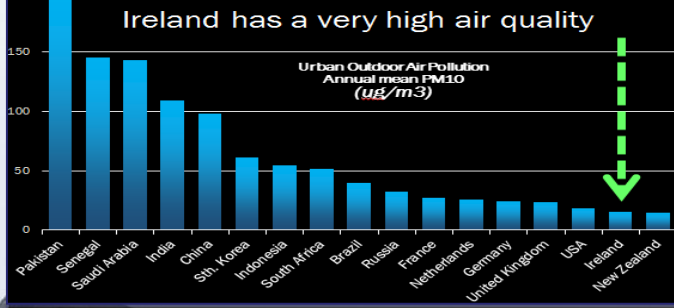
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Irish Food Board

PRICEWATERHOUSECOOPERS

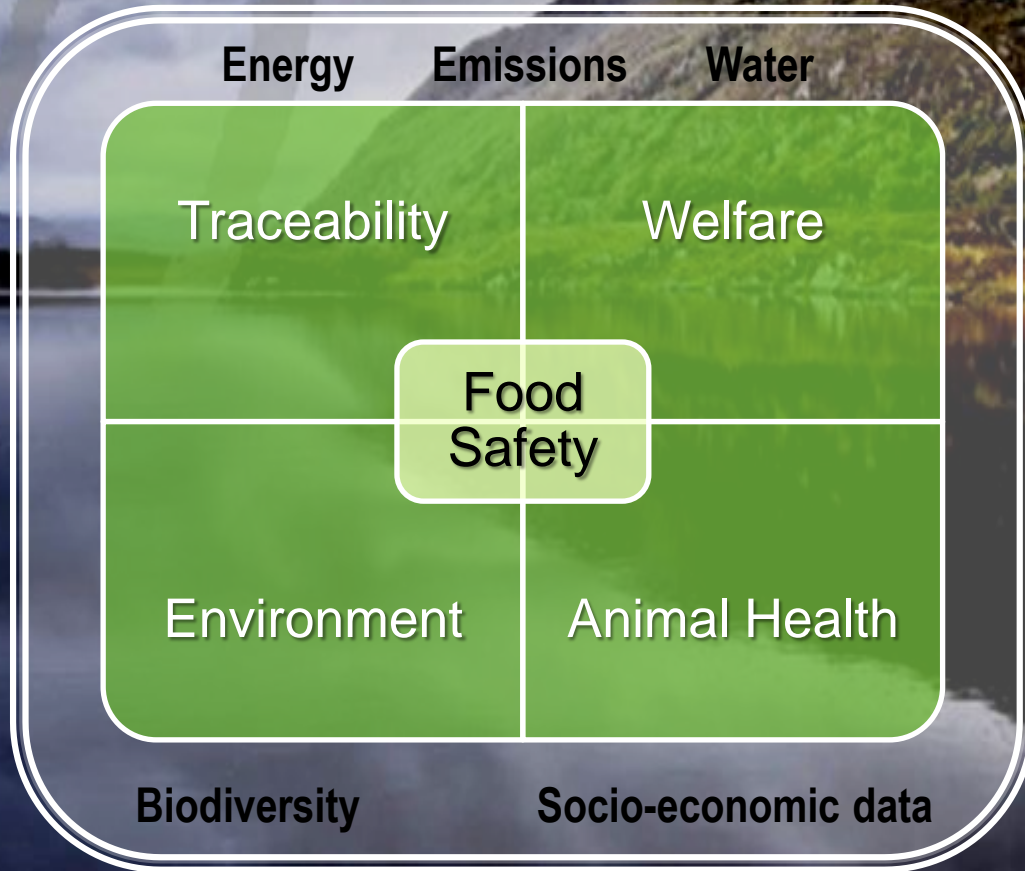
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Ireland's Natural Attributes



Measuring What Matters



Accreditation, independent verification...

ISO
17065

Farm Sustainability Audit - Assessments



AIM profile
for each herd



Farm information
collected on
Handheld



ICBF



Indicative
Performance
for each farm

The Carbon Navigator



Growing the success of Irish food & horticulture

Farm Quality & Sustainability Audits

45,000 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

90,000 carbon assessments on farms to date

Origin Green Verified Members

Company Recruitment Pipeline

529 Companies Registered
90% of exports

210 companies at workshop/
plan development phase

176 plans being processed

143 plans accepted
85% of exports



Working with nature

SUSTAINABILITY REPORT 2015

Growing the success of Irish food & horticulture



Growing the success of Irish food & horticulture





THE SUSTAINABILITY IMPERATIVE

NEW INSIGHTS ON CONSUMER EXPECTATIONS
OCTOBER 2015

nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

CONSUMER
BRANDS THAT
DEMONSTRATE
COMMITMENT TO
SUSTAINABILITY
OUTPERFORM
THOSE THAT DON'T



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