



# Fresh Produce Insight Event

Friday 24<sup>th</sup> November 2017



**Bord Bia**  
Irish Food Board



The Thinking House

BORD BIA INSIGHT CENTRE



Think

## Data Download

*Trends & Performance*

Plan

## Discuss & Prioritise

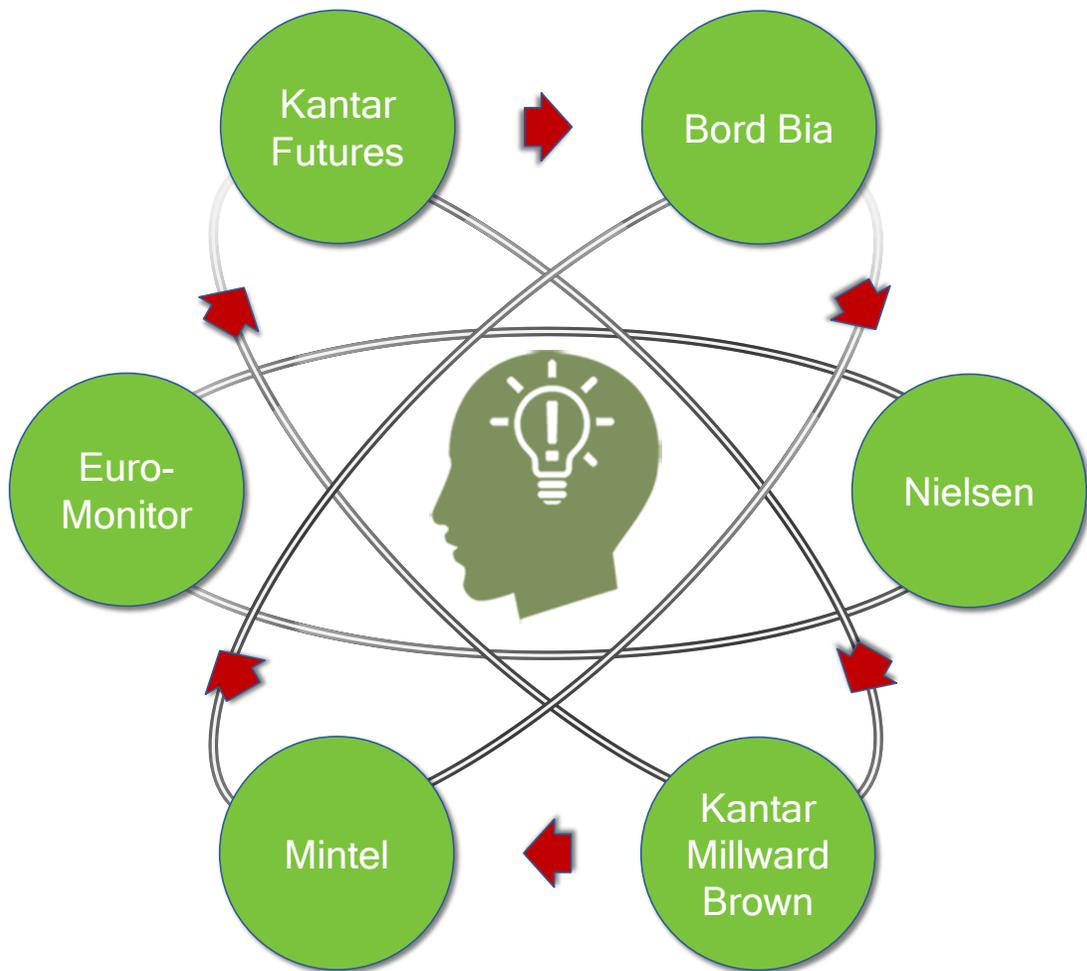
*Building for the Future*

Act

## Align & Progress

*Commit to the Future*





*The insights are drawn from a wide range of sources....*

**KANTAR** WORLD PANEL

**KANTAR** MILLWARD BROWN





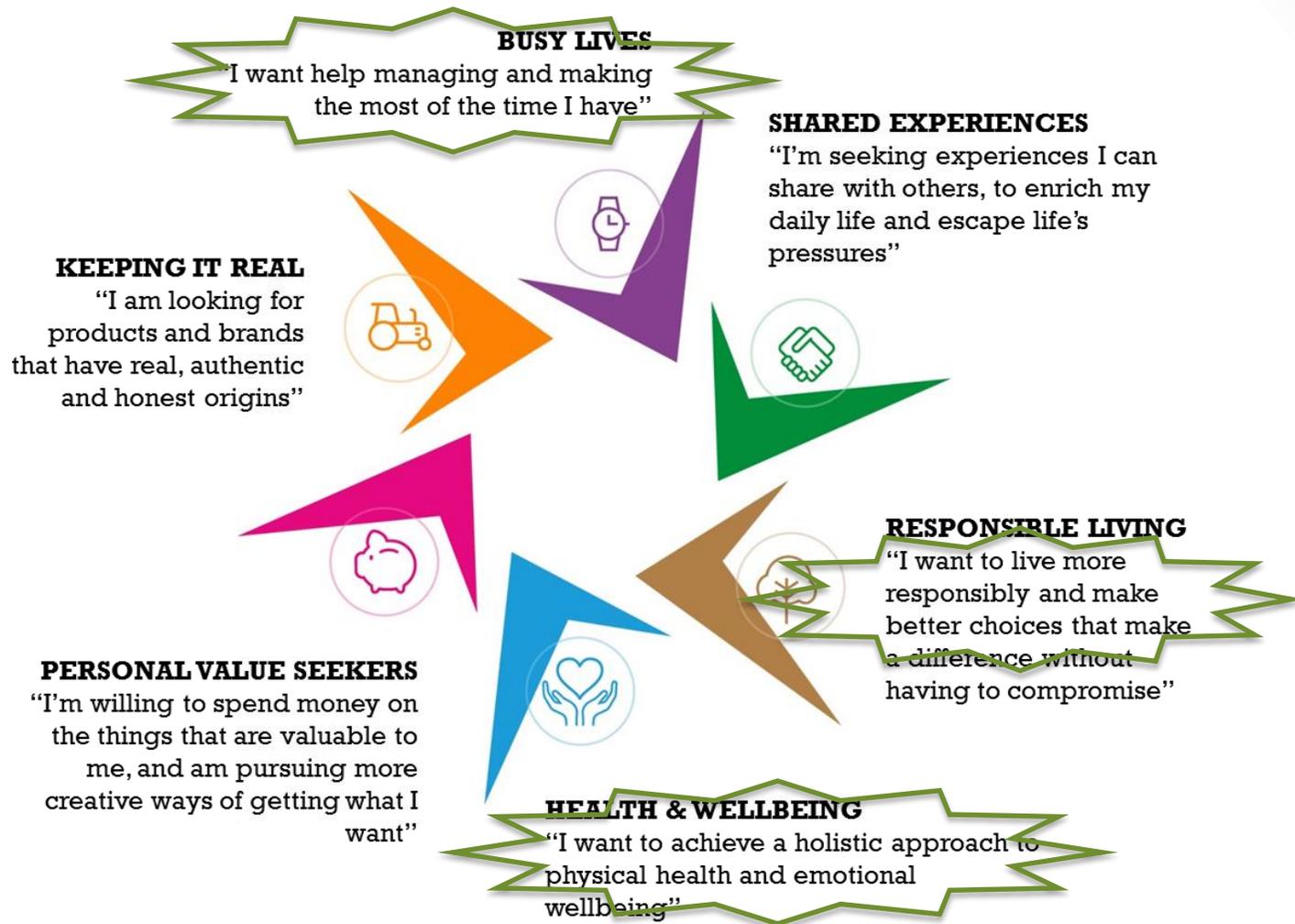
The Thinking House

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***Lifestyle Trends***  
**&**  
***Fresh Produce***

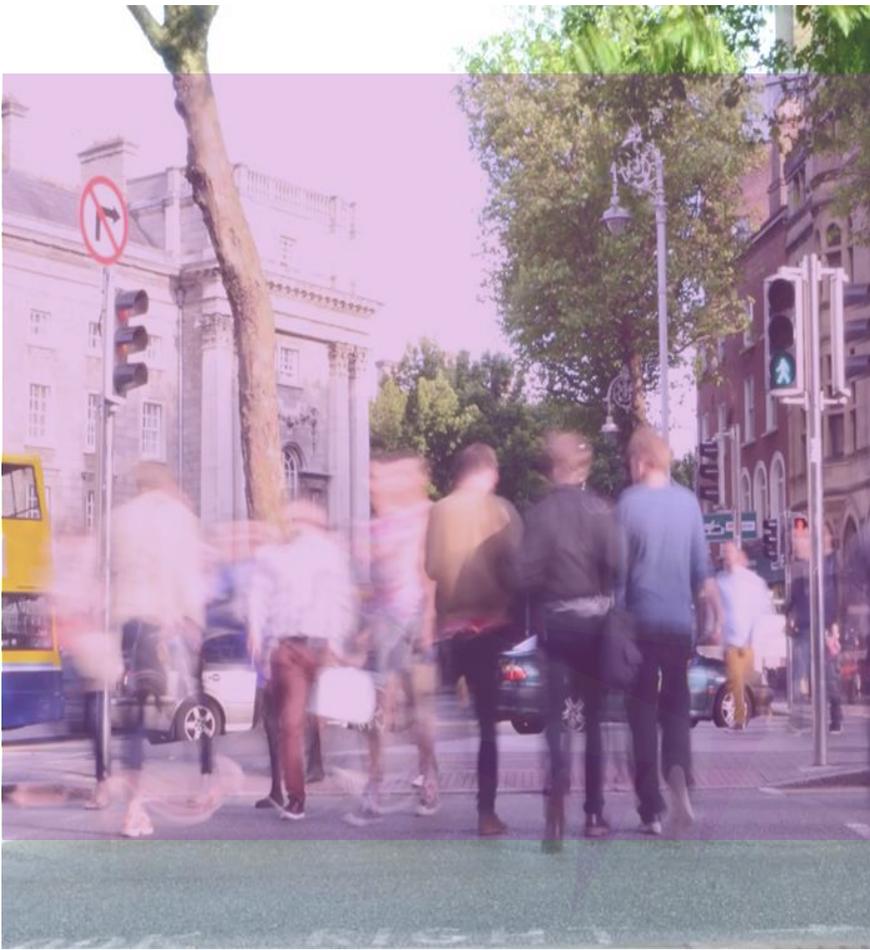


# The Trends





# Overview of sub-trends: Busy Lives



**Right thing, right there**  
Having the right thing when and where you want it

**Simplicity**  
Products that make everyday living more simple

**Pre-empting problems**  
Leaning on lifestyle services that pre-empt problems and outsource tasks

**Life in flux**  
The boundaries between work and leisure, on and off, day and night are blurring with the norm constantly challenged

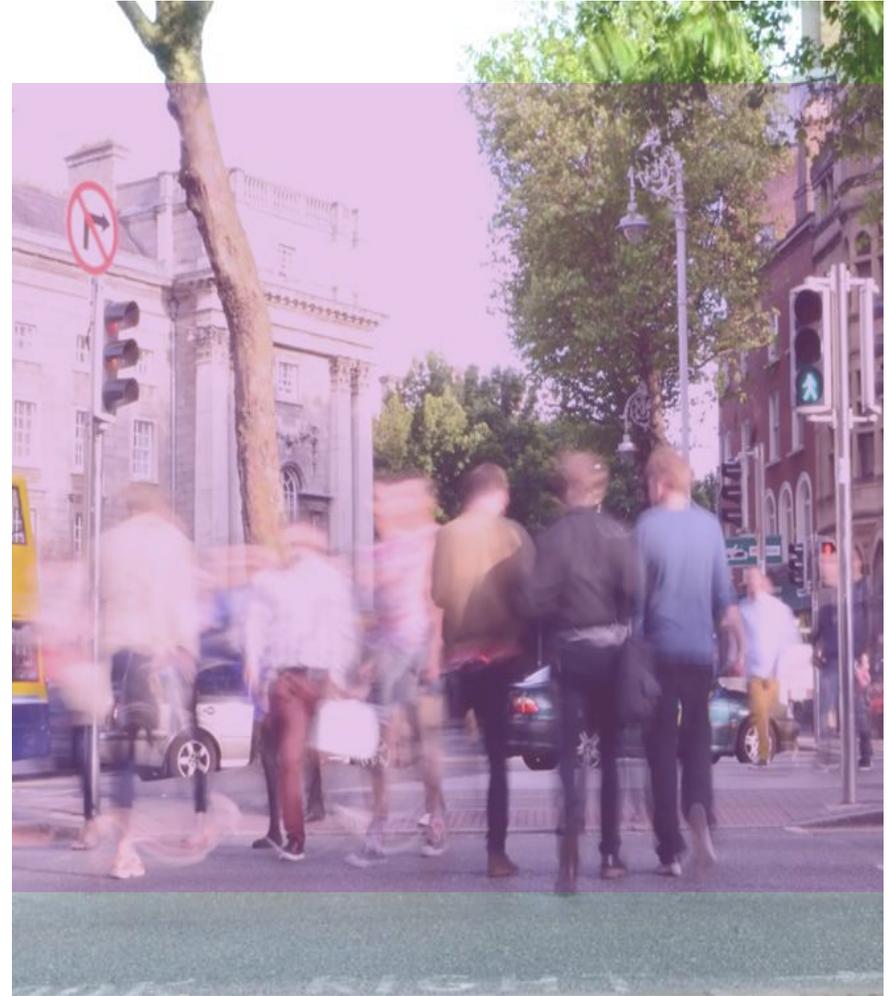
**Functionality with personality**  
An expectation and capability to add greater personalisation and fun when dealing with daily demands of busy lives





## Right thing, right there

Having the right thing when and  
where you want it





# New in-market examples from around the world



Consumer Lifestyle Trends

NEW 2017

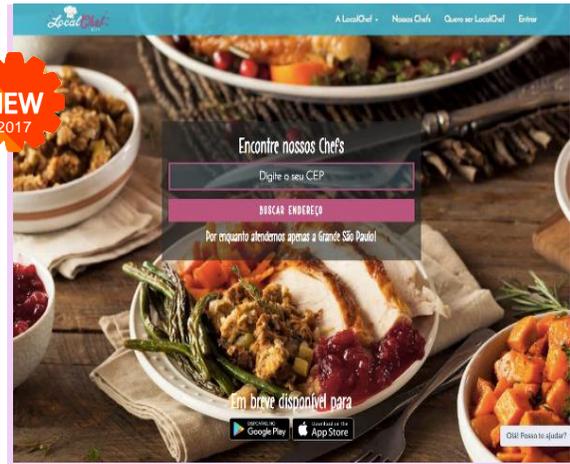


**Shizenshoku F&F**, a supermarket selling organic foods from all regions of Japan, conveniently in a train station



Japan

NEW 2017



**Local Chef**, online food service delivering fresh, homemade food from local members of the community



Brazil

NEW 2017



Food delivery service **Foodora** has partnered with a tech agency to deliver meals by drone



Australia



# In-market examples from around here




**Wiltshire Farm Foods**

**Wiltshire Farm Foods**, hearty whole meals delivered fresh to your door in Greater Dublin. 300 meals, free delivery, heat and eat.




**COOK**  
Remarkable Food For Your Freezer

**Cook**, hand-made freezer ready meals to your door... 3 meals for 2 £18. Also 84 shops selling ready meals and £46m sales




**Gourmet Fuel**, Meal planning and delivery for those aiming for a fitness, well-being, weight-loss or other goal.





# CONVENIENCE

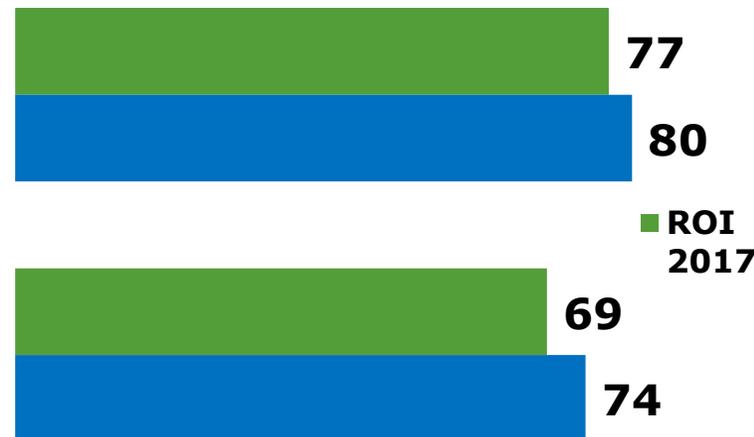




ROI adults are less likely than those in GB to eat ready prepared/to eat foods; however, both countries agree to the same extent that they tend to pick foods that are easy to prepare and quick to cook.

**% Agree strongly/slightly**

**I tend to pick foods that are easy to prepare**



**I tend to pick foods that are quick to cook**



All markets agree they choose foods which are easy to prepare and quick to cook; however, ROI is ranked seventh for using a lot of ready to eat foods, while GB is positioned in fourth place on this statement.





Centra  
**Live Well**  
**€2.50**



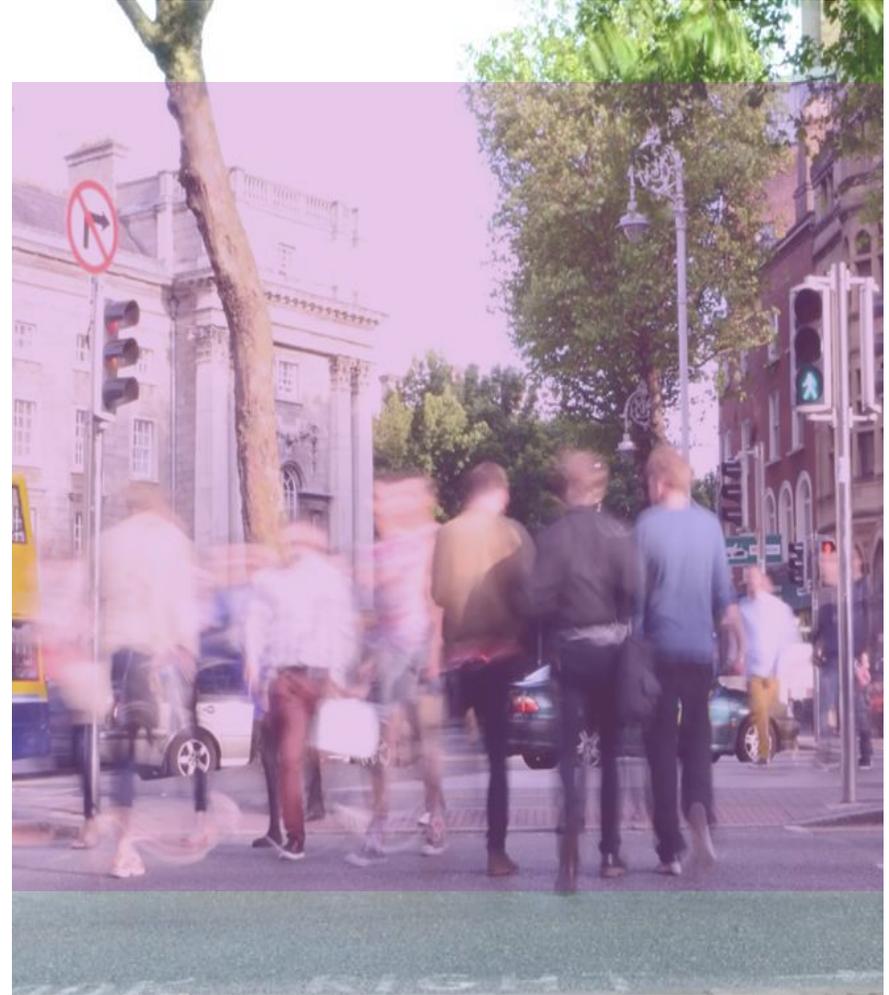
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## Simplexity

Products that make everyday living  
more simple





# In-market examples from around here




**Drop Chef**, recipes with pre-prepared and pre-portioned ingredients to your doorstep. Step by step way to home-cooked meals.




Dedicated to eliminating food waste and building meals; **Handpicks** designs meal kits with groceries paired to cook 3 recipes.




Facilitating scratch cooking at a value price point **Blue Elephant** offer Pad Thai cooking kits in Supervalu.





[MEAL KIT CATALOG](#)

[RECIPE APP](#)

[CONTACT US](#)

## OUR SECRET SAUCE



We analyzed  
**1 billion food posts**  
on social media to understand  
what people like to eat



We curated  
**2 million recipes**  
from the most inspiring  
food sites and blogs



We created  
**100s of meal kits**  
to cater to any diet, cuisine,  
budget, and occasion



# Some Themes from New Product Launches in Past Year

(n=200+ Vegetable Launches, UK and IRL)



## Some New Brands



Waitrose World Deli  
Avocado Smash



Sainsbury's On the Go  
Carrot Batons



M&S Spirit of Summer  
Chargrilled Peppers



Waitrose 1  
Mild Sorrel & Chard Salad

## Top Themes On-Pack

**Vegetarian**

**Ease of Use**

**Ethical: Packaging**

**Seasonal**

## New Ingredients

**Hemp Seeds**

**Red Rice**

**Lacinato Kale**

**Millet**

**Brown Rice**

**Rice Starch**

**Wild Rice**

## Top Pack Types

**Trays on the rise**

**Tubs on the slide**

**Flexi Packs  
relatively stable**





*What is a Vegetable?*

*Is this part of my 5-a-day?*

*Are these Imposters  
impacting vegetables?*





Consumer  
Lifestyle Trends

# Responsible living

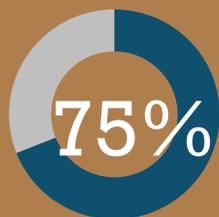


“I want to live more responsibly and make better choices that make a difference, without having to compromise”

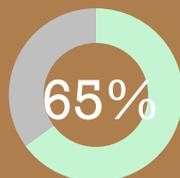


“I’d like to do the right thing, but the fact that it’s overwhelming and complicated to figure out the most effective things to do is holding me back from leading a more environmentally conscious lifestyle”

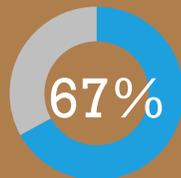
(% great deal/somewhat)



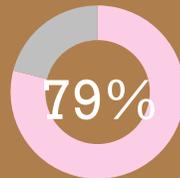
Global Average  
+3% since 2015



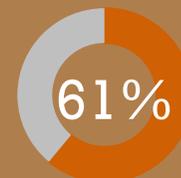
AUSTRALIA



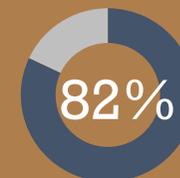
FRANCE



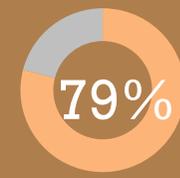
BRAZIL



USA



JAPAN



GB



# Overview of sub-trends



Consumer  
Lifestyle Trends



## Local action

Working together to have local impact

## Conserving resources

Living in a world where resources are in short supply

## War on waste

Reducing the wasteful byproducts of consumption

## Good citizenship

Working to protect and care for causes, groups and people that are most in need

## Fair Treatment

Treating animals and people fairly throughout the production process

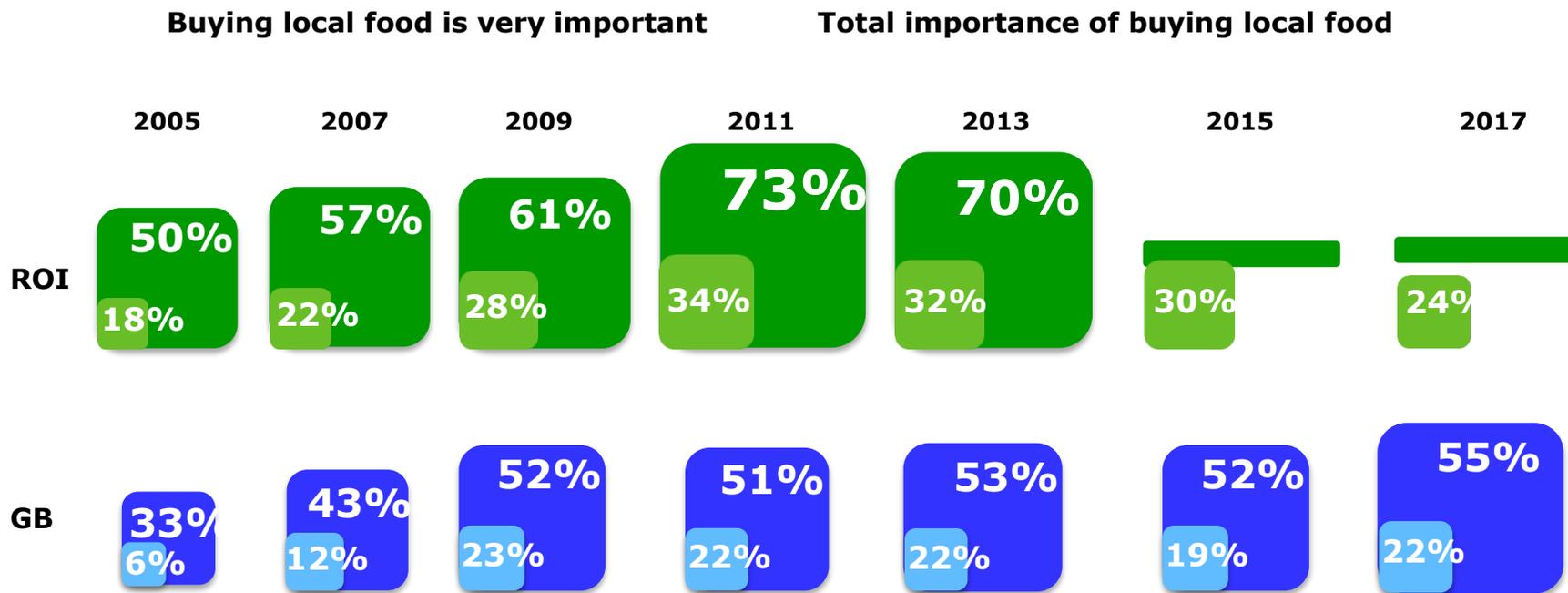
## Totally transparent

Expectation of complete honesty





The importance of buying 'local' peaked in ROI during the recession. The situation has been less variable in GB over the years. Just under 1 in 4 in both markets consider buying local food to be very important.



Buying local food is most important in France, China and Spain.



# How is this sub-trend evolving? Local Action



Consumer Lifestyle Trends

## How it was

## How it is

## How it will be



A reliance on businesses and local authorities to instigate change for the better.

Local authorities and businesses supporting education

Collective community endeavours by proactive and like-minded individuals

£25 per month and work 4 hours per month for 20% off

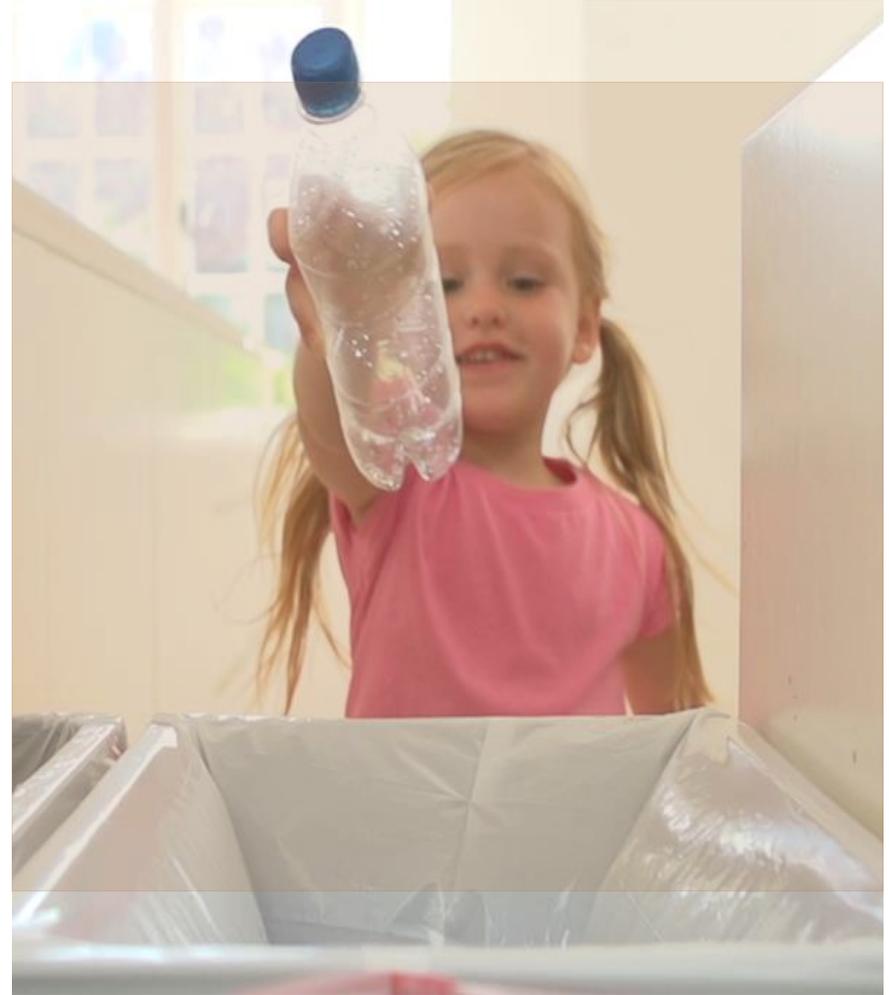
Brands facilitating the consumer desire to 'do good': Making it easy to do good on your doorstep.

Take-away for shelf-stable food bank donations



## War on waste

Reducing the wasteful byproducts of consumption





# How is this sub-trend evolving?



Consumer Lifestyle Trends

## How it was



Growing consumer desire for low-waste products that can be easily repurposed or recycled

Nestles Smart Pack reusable refills

## How it is



Increasing social unacceptability of waste at all levels; particular focus on food waste

Food Waste Woodstock

## How it will be



The war on waste becomes more social

Cook parties of unused fruit and veg from local markets



# New in-market examples from around the world



NEW 2017



Wasty app showing people how to make-over leftovers into new meals



Australia

NEW 2017



Farmsquare app exchange of fruit and veg from urban gardens



Brazil

NEW 2017



**Pur, Etc.** encouraging patrons to organise their own waste after dining



France



HARRIS FARM  
MARKETS

IMPERFECT PICKS

UP TO 50%  
CHEAPER  
THAN OUR REGULAR  
RANGE

REDUCE FOOD WASTAGE    HELP AUSSIE FARMERS    LOVE THE SAME FRESH TASTE





In GB, the commitment to conscious consideration of environmental issues when choosing what products to buy has stabilised. Those in ROI remain more likely to make this consideration.

PERIscope 2017

*% who agree that they are more conscious of environmental issues in their choice of products*

**ROI**

**GB**



ROI's consciousness of environmental issues when choosing products ranks fourth while GB ranks towards sixth lowest of all the countries.





Consumer  
Lifestyle Trends

# Health & wellbeing

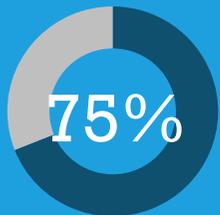


“I want to achieve a holistic approach to physical health and emotional wellbeing”

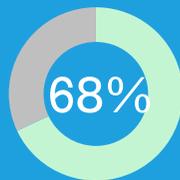


“I eat, drink or take functional foods to improve my wellbeing”

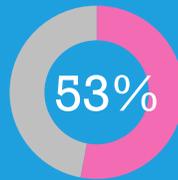
(% regularly/occasionally)



Global Average  
+2% since 2015



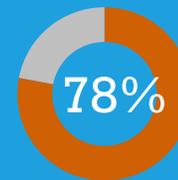
AUSTRALIA



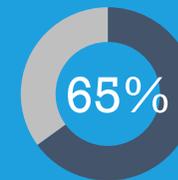
FRANCE



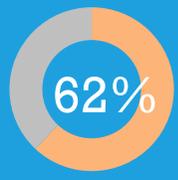
BRAZIL



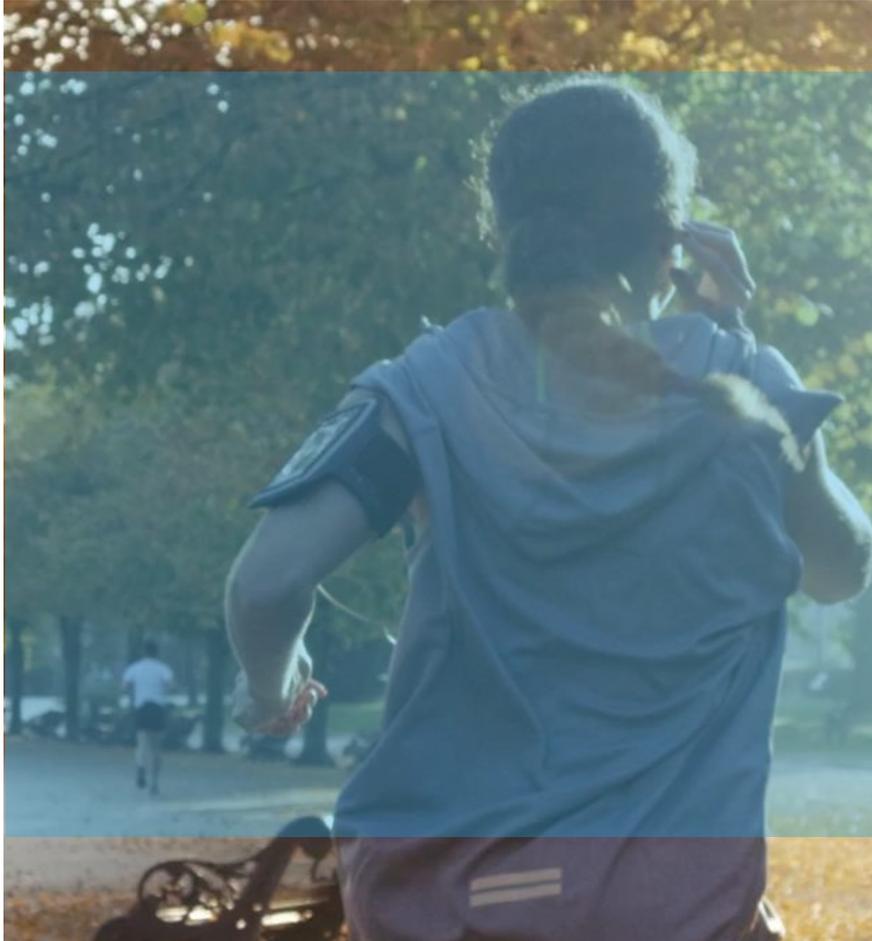
USA



JAPAN



GB



## Proactive prevention

Proactively defending the body against future disease and illness

## Essential purity

Desire for raw, natural and clean

## Pursuit of happiness

Healthy choices are seen as an enjoyable and effective way to nourish mind, body and soul

## Strength in numbers

weight training and protein rich diets are gaining mass appeal and status

## Seamlessly in tune

tuning into the long- and short-term cycles of your body and mind

## Personal solutions

Desire for personalised health solutions & measurement tools tech-enabled or otherwise)

## Good start

Ensuring children get the best start in life





## Proactive prevention

Proactively defending the body against future disease and illness



# New in-market examples from around the world

NEW 2017



**KeVita** flavoured, sparkling probiotic drink for digestive health.



USA

NEW 2017



**Organic Burst Baobab Joy** prebiotic supplement powder



South Africa

NEW 2017



**Reliefband Neurowave** biotech-powered sickness prevention



USA



# NATURAL FIGHTERS

## JUICY BENEFITS OF 14 FRUITS & VEGGIES



### Grapefruits

Studies suggest that grapefruits (red & pink only) have important antioxidant benefits due to presence of lycopene



### Cauliflowers

Contain glucoraphanin, which could be converted into sulforaphane to provide immune system benefits



### Cantaloupes

Contain a diverse profile of nutrients like beta-carotene, which could lower the risks for developing asthma



### Carrots

Contain an abundance of vitamin A, which is known for improving your vision and preventing eye diseases



### Apples

Contain phytonutrients like apple polyphenol, which could help with regulating blood sugar levels



### Bok Choy

Are a good source of omega-3s, which have been shown to help prevent heart diseases and strokes



### Lemon/Limes

Are an excellent source of vitamin C, which is vital to the function of a strong and healthy immune system



### Beets

Contain a specific type of fiber, which could provide health benefits such as reducing the risk of colon cancer



### Papayas

Are a good source of dietary fiber, which has been shown to reduce high cholesterol levels



### Kales

Contain an unusual mix of carotenoids and flavonoids, which have been shown to reduce the risk of cancer



### Pears

Are also a good source of fiber, which could help reduce the risks of forming type 2 diabetes and heart diseases



### Swiss Chards

Contain syringic acid, which could help people with diabetes by regulating blood sugar levels



### Cranberries

Have proanthocyanidin (PAC), which is known to help treat and prevent Urinary Tract infections



### Asparagus

contains a rich amount of glutathione, a compound that could help break down harmful carcinogens

Source: <http://www.whfoods.com/foodstoc.php>

CREATED BY  
ORGANICLESSON.COM



# IRON-RICH FOODS



green peas



bok-choy



brussel sprouts



raisins



soy beans



black-eyed peas



arugula



pumpkin seeds



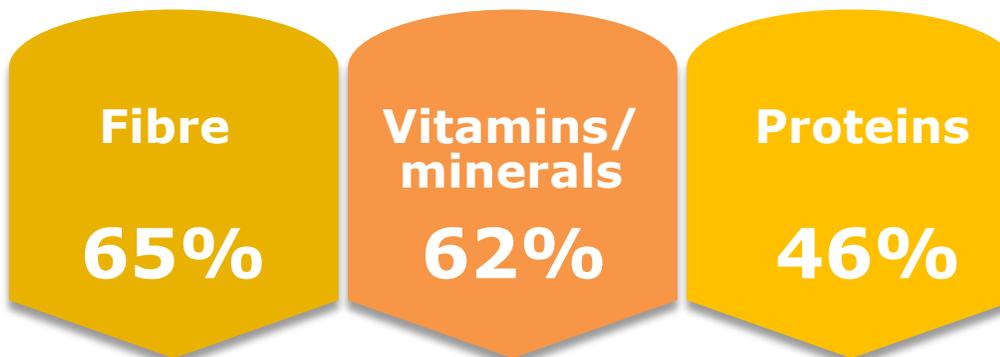
broccoli





# If we want to improve our diet, we think....

We need to eat more



We need to eat less



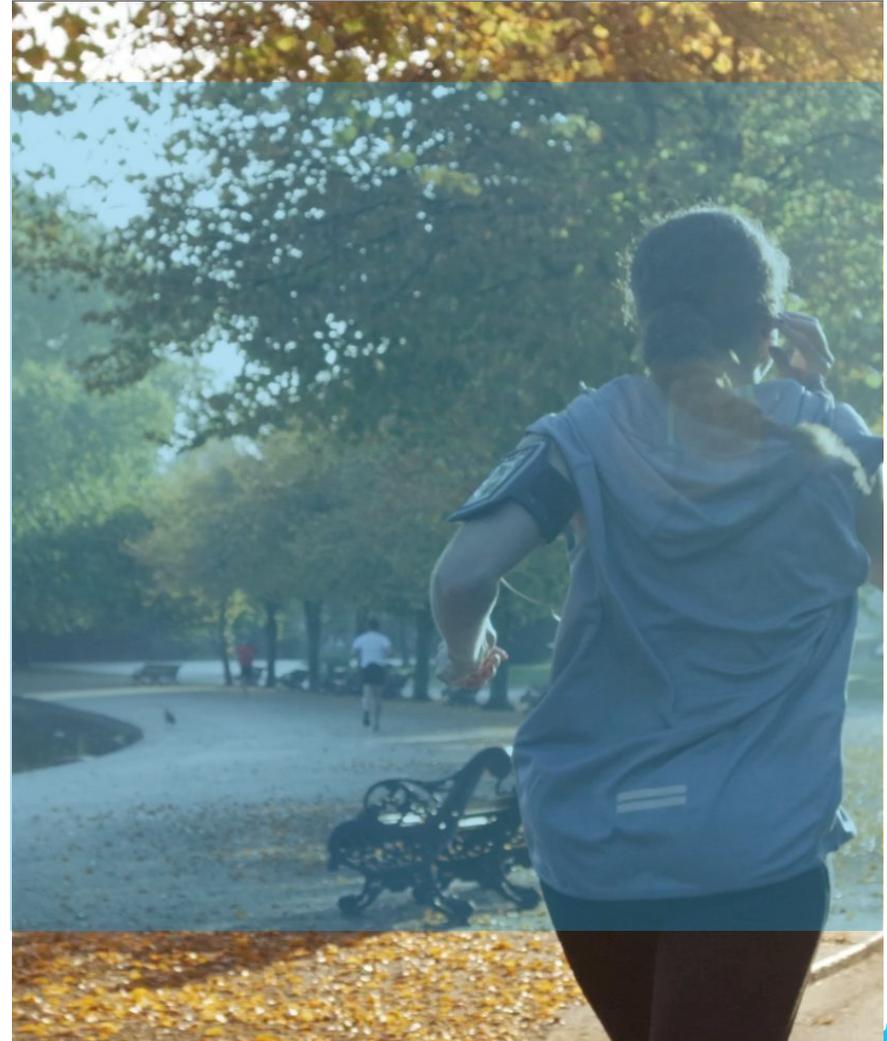
(% suggest we should eat more/less)





## Essential purity

Desire for raw, natural and clean





# How is this sub-trend evolving?



Consumer Lifestyle Trends

## How it was



Harnessing the health benefits of specific natural ingredients, and prioritising lower processing

## How it is



A more holistic understanding of the benefits of simple food preparation processes and components

## How it will be



Greater desire to incorporate stripped back eating into everyday diets (e.g. part-time vegans or flexitarians)



**NEW**  
2017



**JuicePress** 1-5 day 'Eat Clean' eating plan.

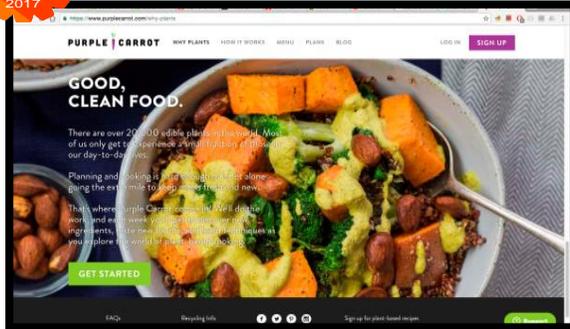
Fireball Immune Booster

Truffle Green Protein



USA

**NEW**  
2017



**Purple Carrot** vegan and organic delivery service



USA

**NEW**  
2017



**Gloops** quick innovation to meet Brazilian government guidelines

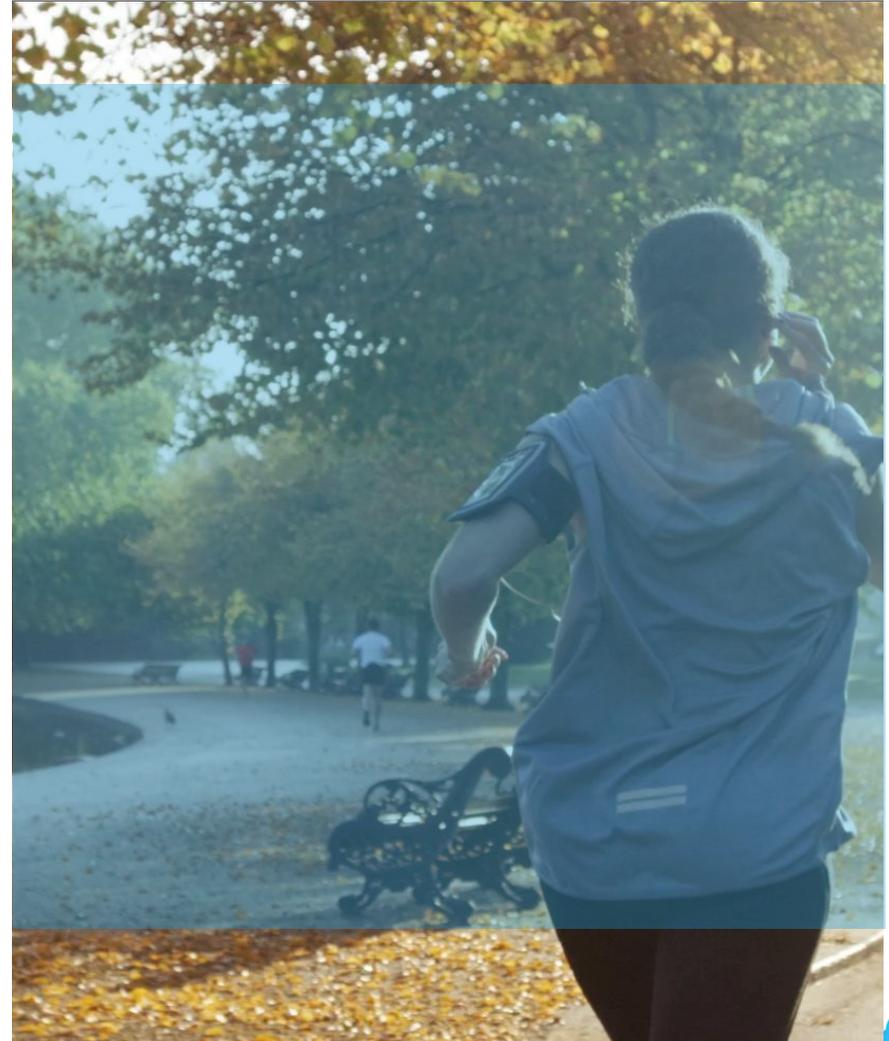


Brazil



## Personal solutions

Desire for personalised health solutions & measurement tools (tech-enabled or otherwise)





# How is this sub-trend evolving?

Consumer Lifestyle Trends



## How it was



Personalised diets based on allergies and intolerances

## How it is



Holistic, personalised and often tech-enabled plans

## How it will be



Solutions that are tied to the unique DNA of your body

# New in-market examples from around the world

NEW 2017



**Jawbone and Munchery** tracking your take-away nutritional information



USA

NEW 2017



**Tossed** digital salad customisation



United Kingdom

NEW 2017



**Smartplate Topview** personal health suggestions thanks to Artificial Intelligence.



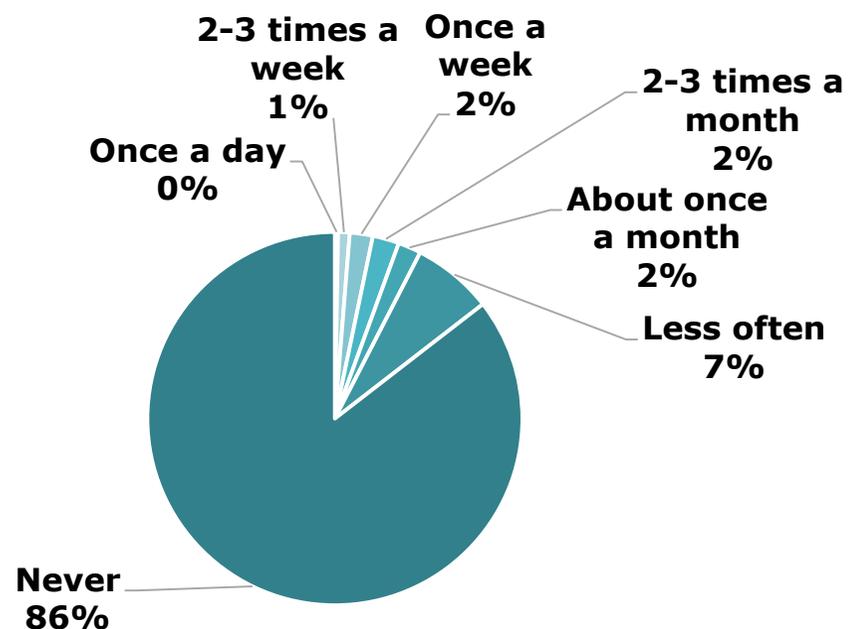
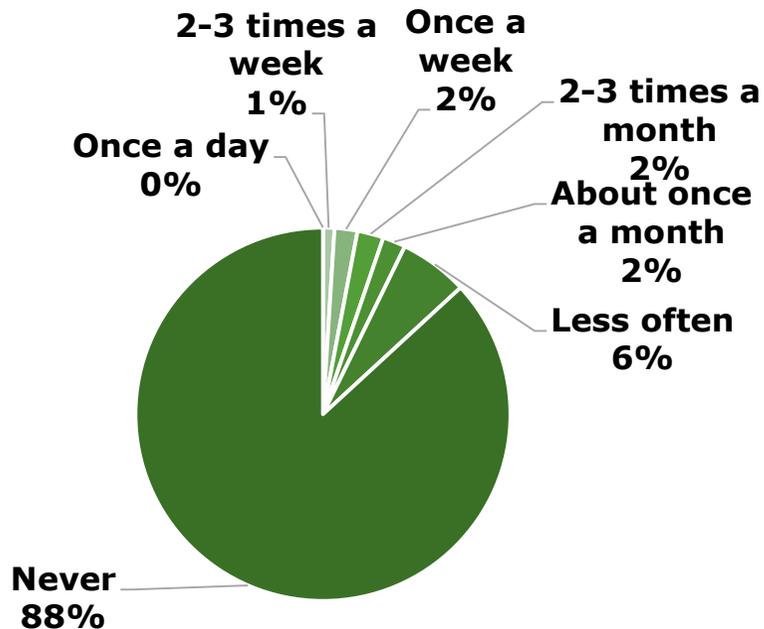
USA

FIT FOOD



Ordering fresh meal prep kits is very limited in both ROI and GB.

### Frequency of Ordering Fresh Meal Prep Kits

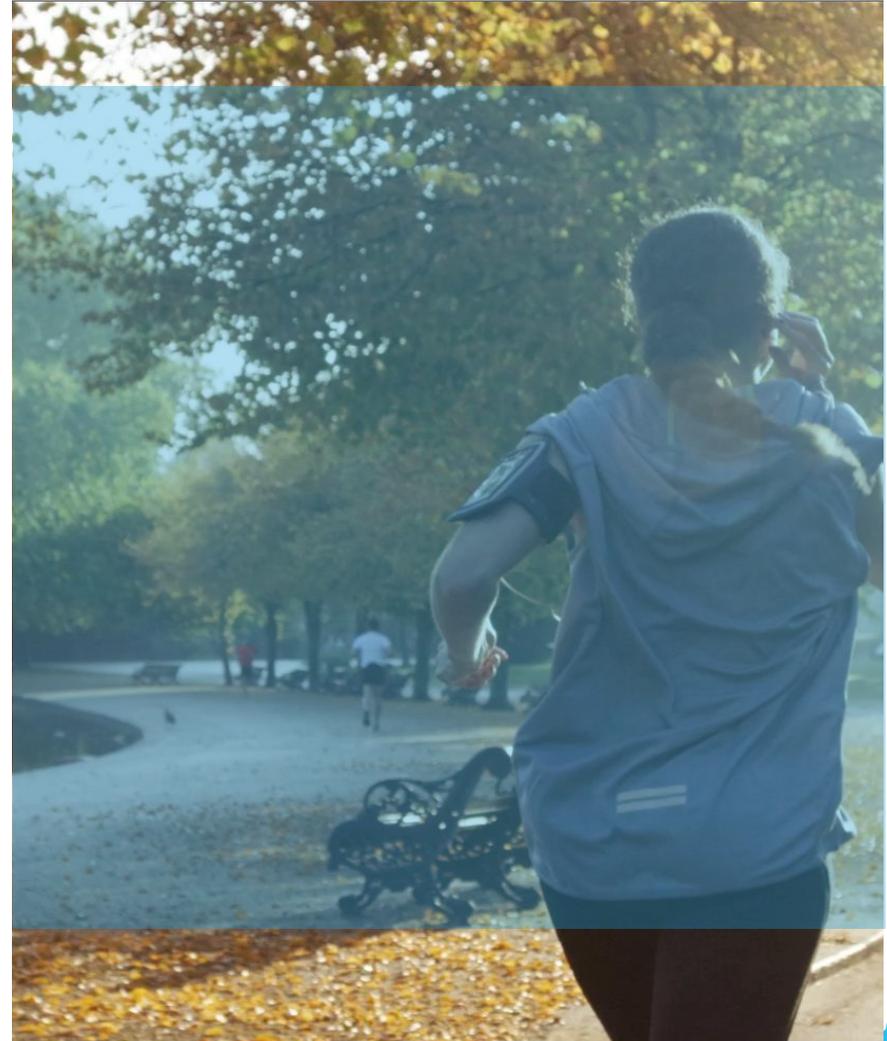


Fresh meal prep kits are a niche product across all EU markets.



## Good start

Ensuring children get the best start  
in life







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Q & A



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# **Fresh Produce** *Market Dynamics*



**The Irish Grocery Market continues to grow 12we, up 2.3%.**



**Average HH Spend grew by +1.3% as shoppers spent more per trip (+€0.50) despite making slightly fewer trips (-0.8%).**



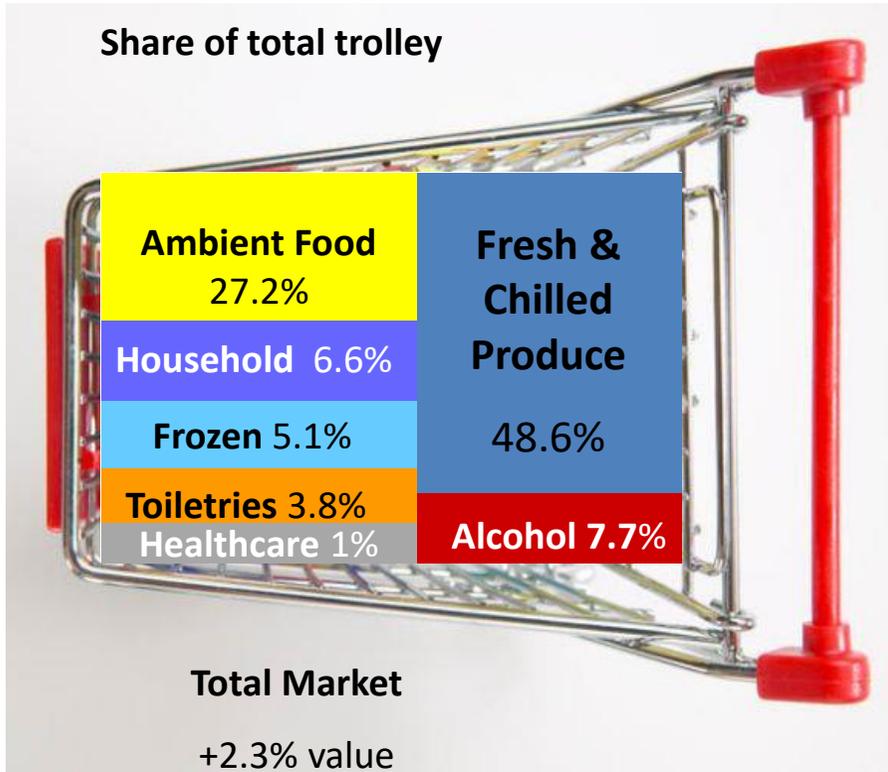
**SuperValu just about remain in first position with 22.1%, Tesco are second with 22.0%, while Dunnes are third with 21.6%.**





**Fresh & Chilled** has grown ahead of the market and increased value share of grocery.

52w Total Grocery – sector(s) value share & YoY %chg





Total Fresh Produce Kantar/ CSO / Mintel / Revenue (1.1Bn)



**Kantar**



**38%**

Value -1.7%



**49%**

Value +4.9%



**13%**

Value +3.6%



# Total Fresh Produce Key Performance measures

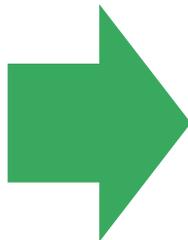
Total Produce Sales increase by €58m as Shopper buying more often and price increases drive growth

€ 1.5Bn



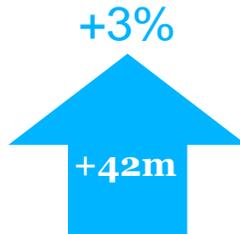
Penetration

99.9% of ROI



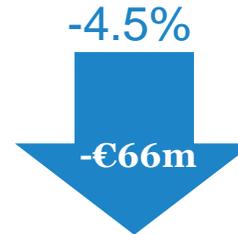
Frequency

175.7 x year



Trip Volume

2.5 x trip



Price per KG

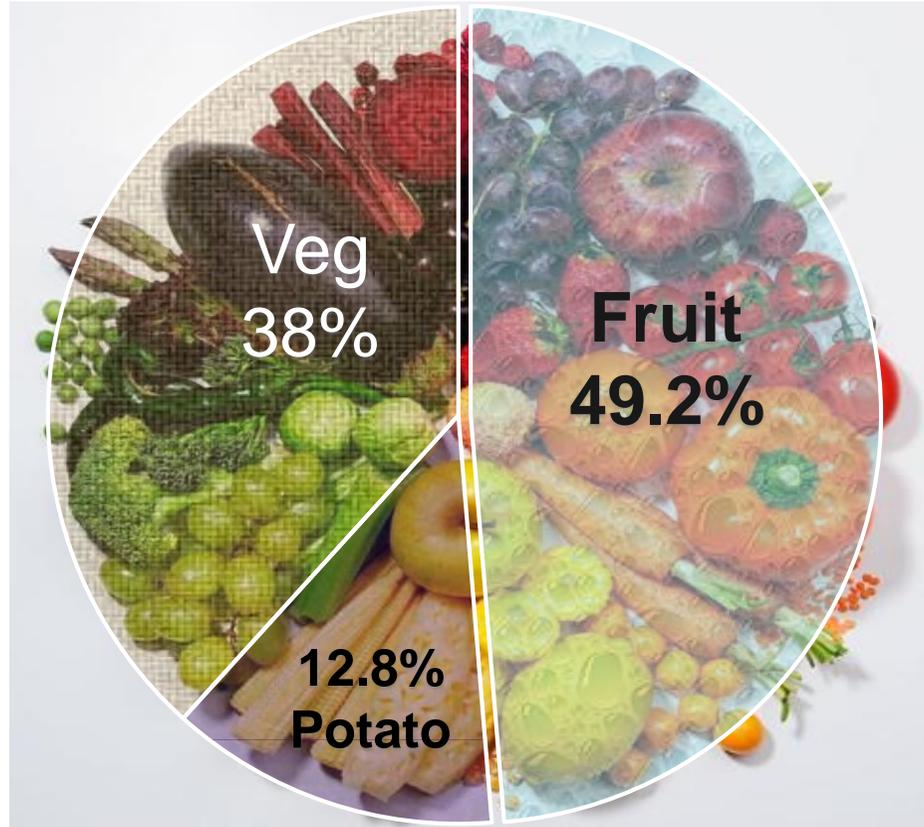
€1.97





# Market Share

52 w/e Value Share



€ 1.5Bn

## Spend and YoY Change

**Total Fruit:**  
**€35m (+4.9%)**

**Total Veg:**  
**(Excl Potato)**  
**€10m (-1.7%)**

**Total Potato:**  
**€7.3m (-3.6%)**

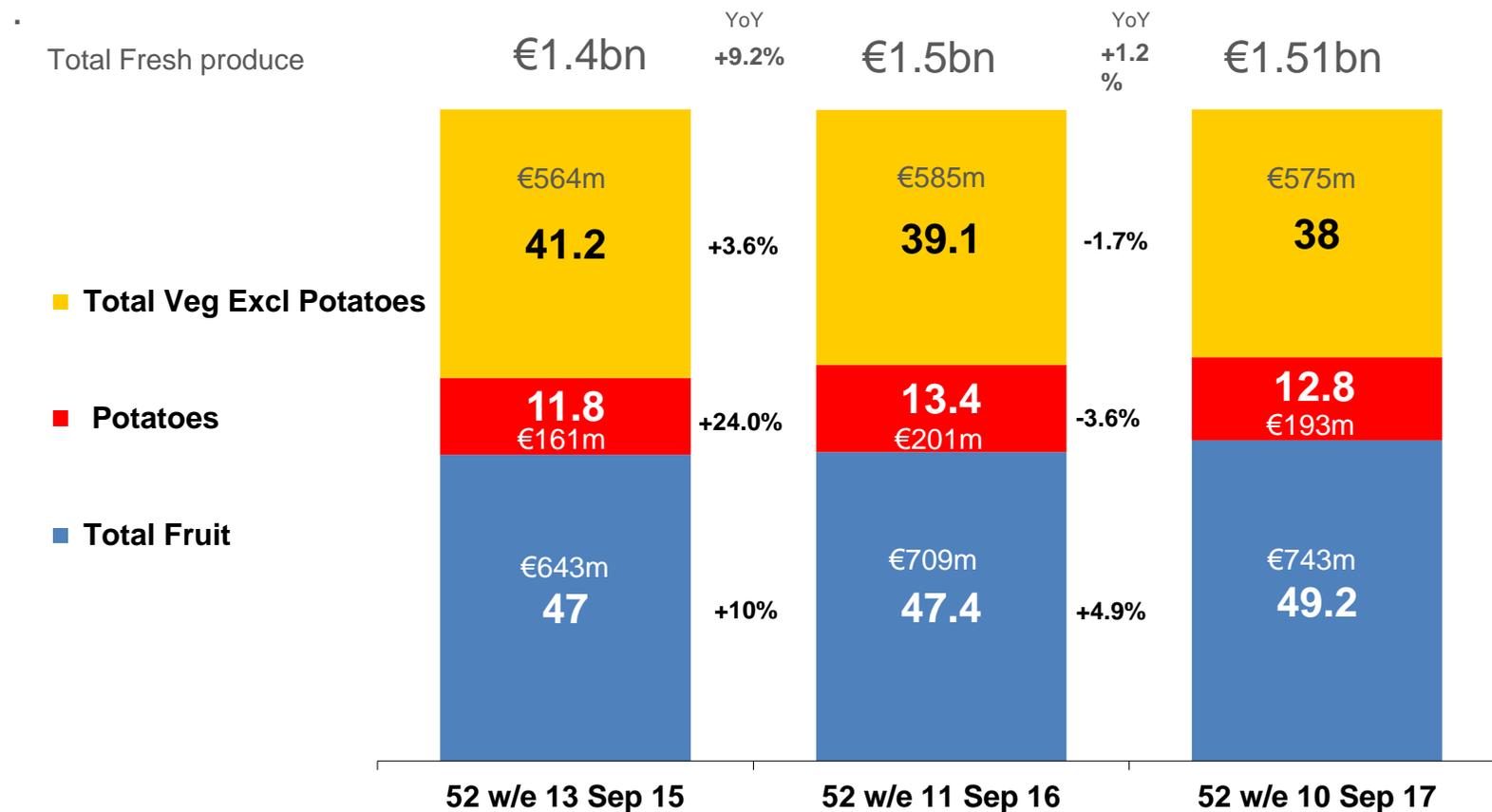
Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017





## Total Fresh Produce sector split – Value

**Fruit is the only sector to continue seeing growth this period.**



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017

70





# 52w/e Key Measures



shoppers



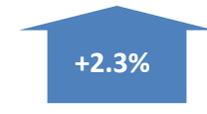
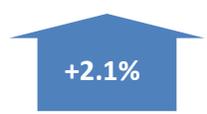
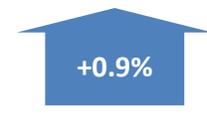
Frequency



Volume Per Trip



price



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017





# SuperValu are the Leading retailer in Fresh Produce, however they are seeing a decline in yoy value sales

Spend (€000) | Total Produce | 12 w/e



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017





Pretty much everyone eats fresh vegetables, fresh potatoes and/or fresh fruit at least weekly....

**Eat at least once a week**



**Fresh fruit 94%**



**Fresh veg**

**96%**



**Fresh potatoes**

**96%**



Fresh salads are a different story (69% eat at least weekly)





The vast majority try to eat a lot of fruit and vegetables. Hi-Fibre is relatively more important to adults in ROI.

*% Agree strongly/slightly*



Attitudes towards the basic elements of a healthy diet are similar everywhere – GB has the lowest incidence of always trying to eat hi-fibre foods.



# Fresh produce under the microscope

## Fresh fruit dominates

Eat weekly +



Fresh fruit **94%**



Fruit juice **68%**



Smoothie **35%**



Daily Fresh fruit **45%**

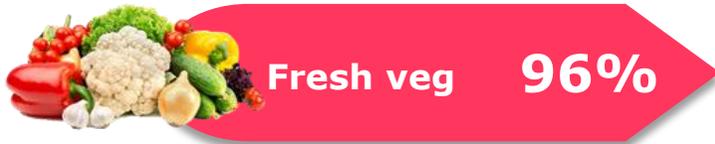




# Fresh produce under the microscope

## Fresh veg is bigger than frozen/tinned

Eat weekly +



Frozen veg **46%**

Tinned veg soup **31%**

Tinned veg **31%**



Daily Fresh vegetables  
**51%**





# Fresh produce under the microscope

Half of us include frozen chips once a week

Eat weekly +



Fresh potatoes

96%



Frozen chips

50%



Daily Fresh potatoes  
34%





# Fresh produce under the microscope

We tend to make most of our salads ourselves

Eat weekly +

Any salad (from scratch) **69%**

Pre-packed chilled leafy salad **47%**

Pre-packed chilled wet salad **35%**

Pre-packed chilled mix tray/ salad bowl **29%**



Daily Fresh salads 8%



# Ideal world vs. reality

**How many portions of fruit, vegetables and salads should a person eat per day?**

**And how many portions of fruit, vegetables and salads do you eat in a typical day?**

On average:



**2006:  
4.2  
portions**

**2010:  
4.7  
portions**

**2017:  
5.6  
portions**



**2006:  
3.2  
portions**

**2010:  
3.9  
portions**

**2017:  
4.2  
portions**

**We are getting marginally better at eating our fruit, veg and salads.**

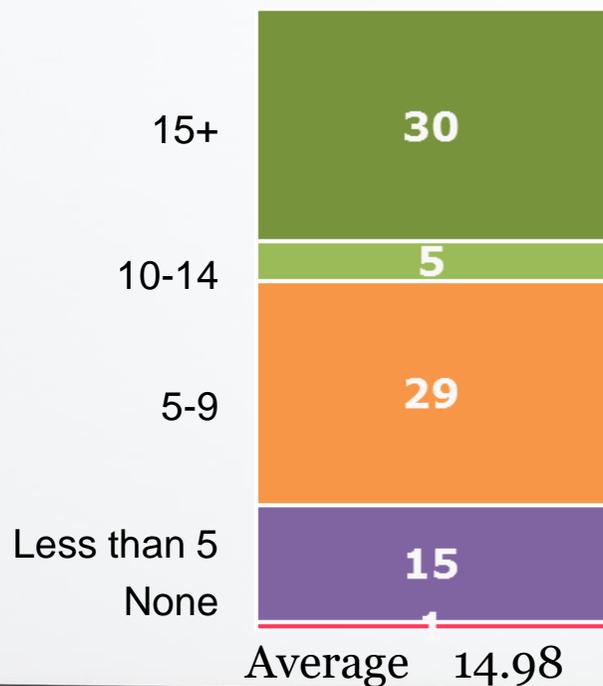




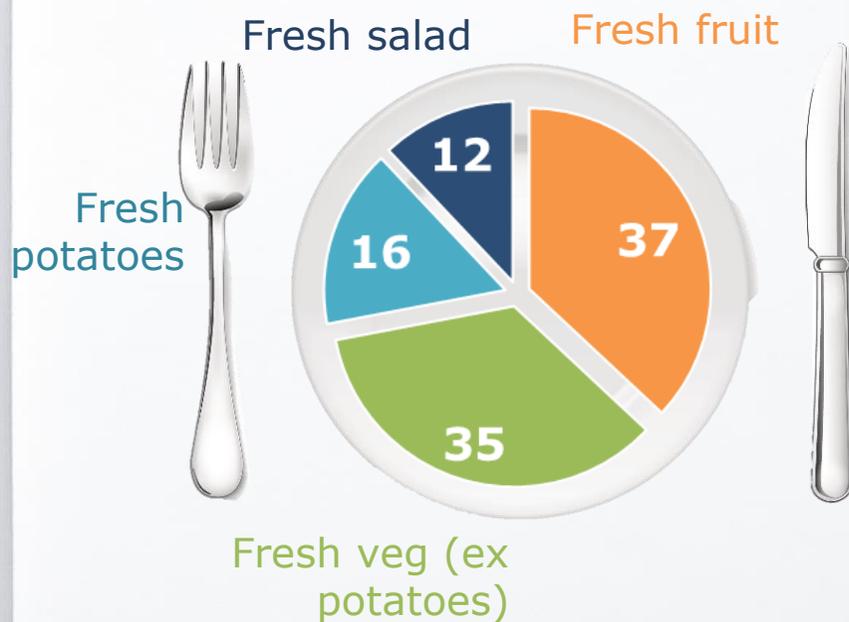
# Average food diary – past 3 days

Base: All respondents

Number of portions eaten in the past 3 days



Of these portions, what was the share of...

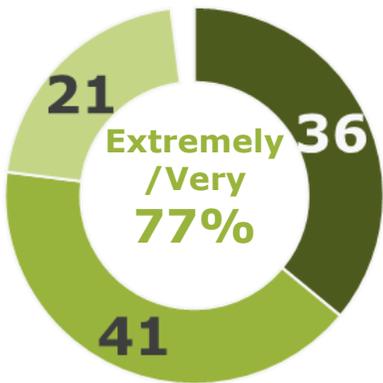




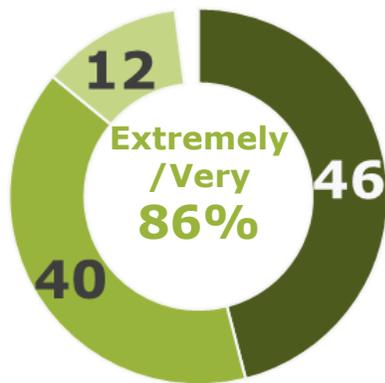
# What seems to have the most potential to become central to a healthy and nutritious balanced diet?

Base: All respondents

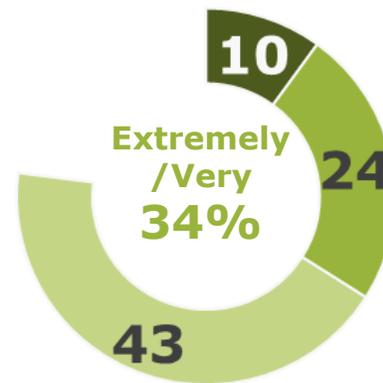
## FRESH FRUIT



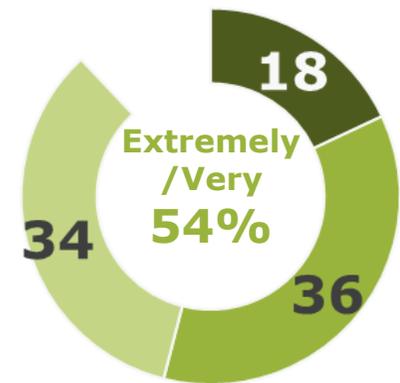
## FRESH VEGETABLES



## POTATOES



## SALAD



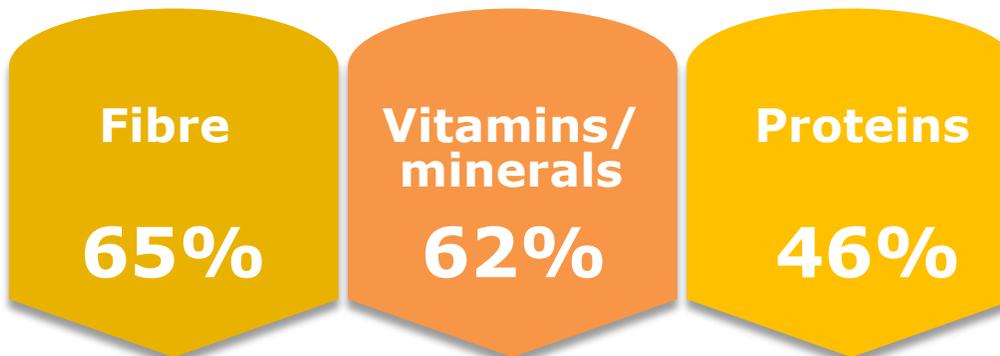
- Extremely important
- Very important
- Fairly important



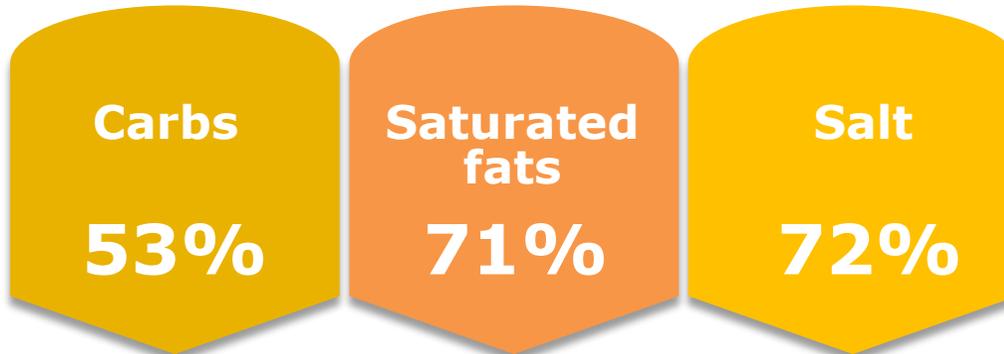


# If we want to improve our diet, we think....

We need to eat more



We need to eat less



(% suggest we should eat more/less)





The Thinking House

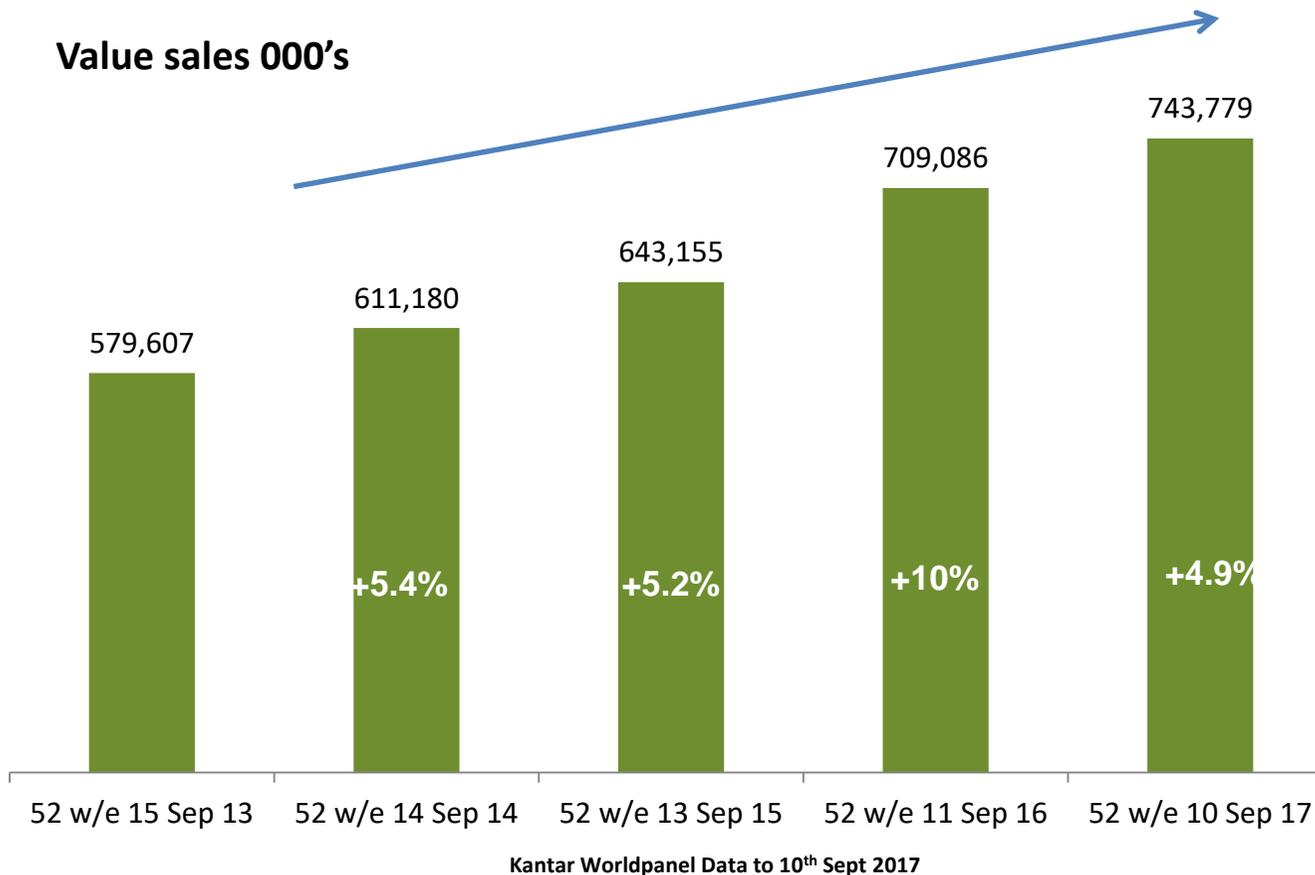
BORD BIA INSIGHT CENTRE

# Digging a little deeper: *Fruit*





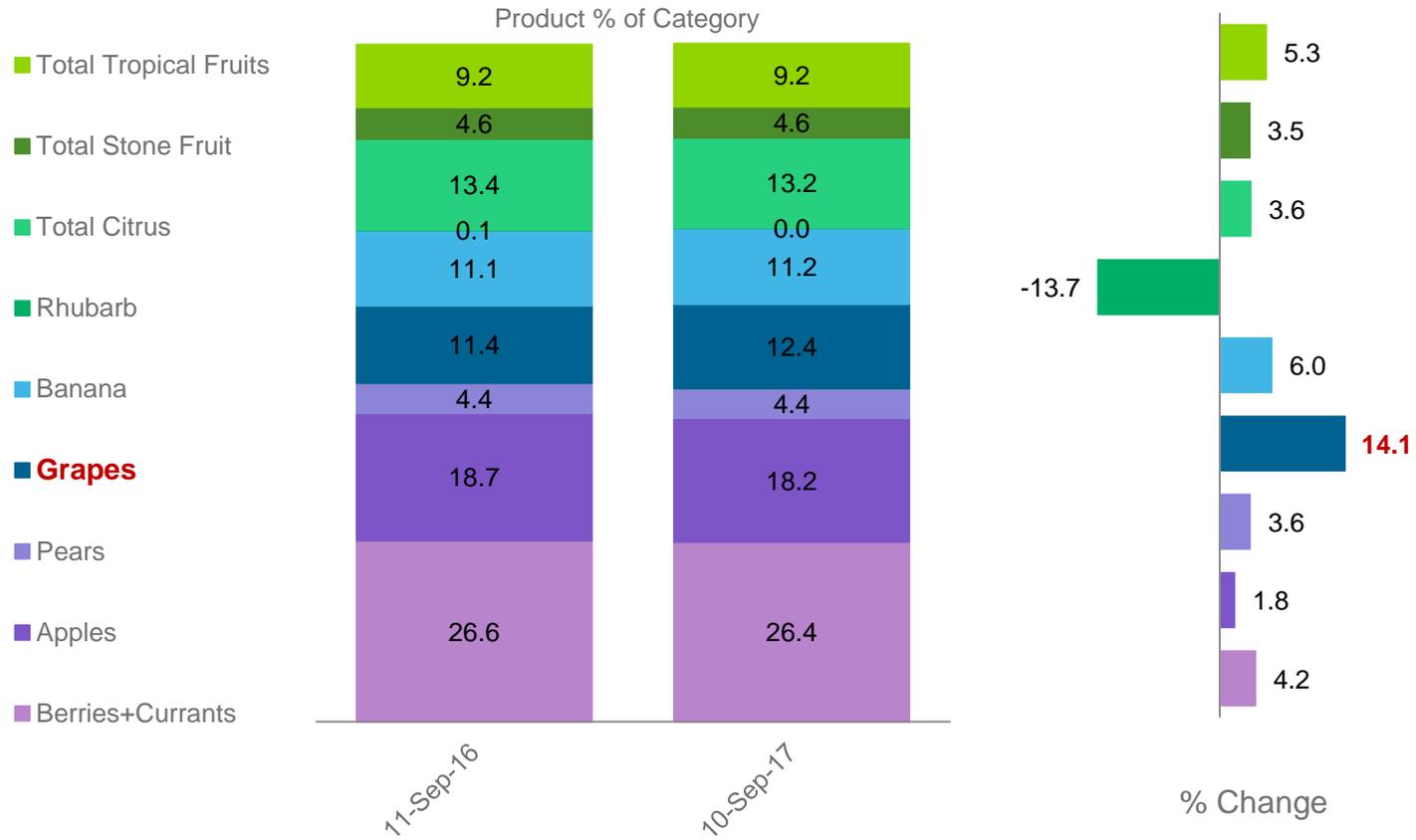
## Fruit – Yearly growth consistent over past number of years





# Fruit Sub-segments – Value Share

Spend (€000) | Total Market | 52 w/e



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017

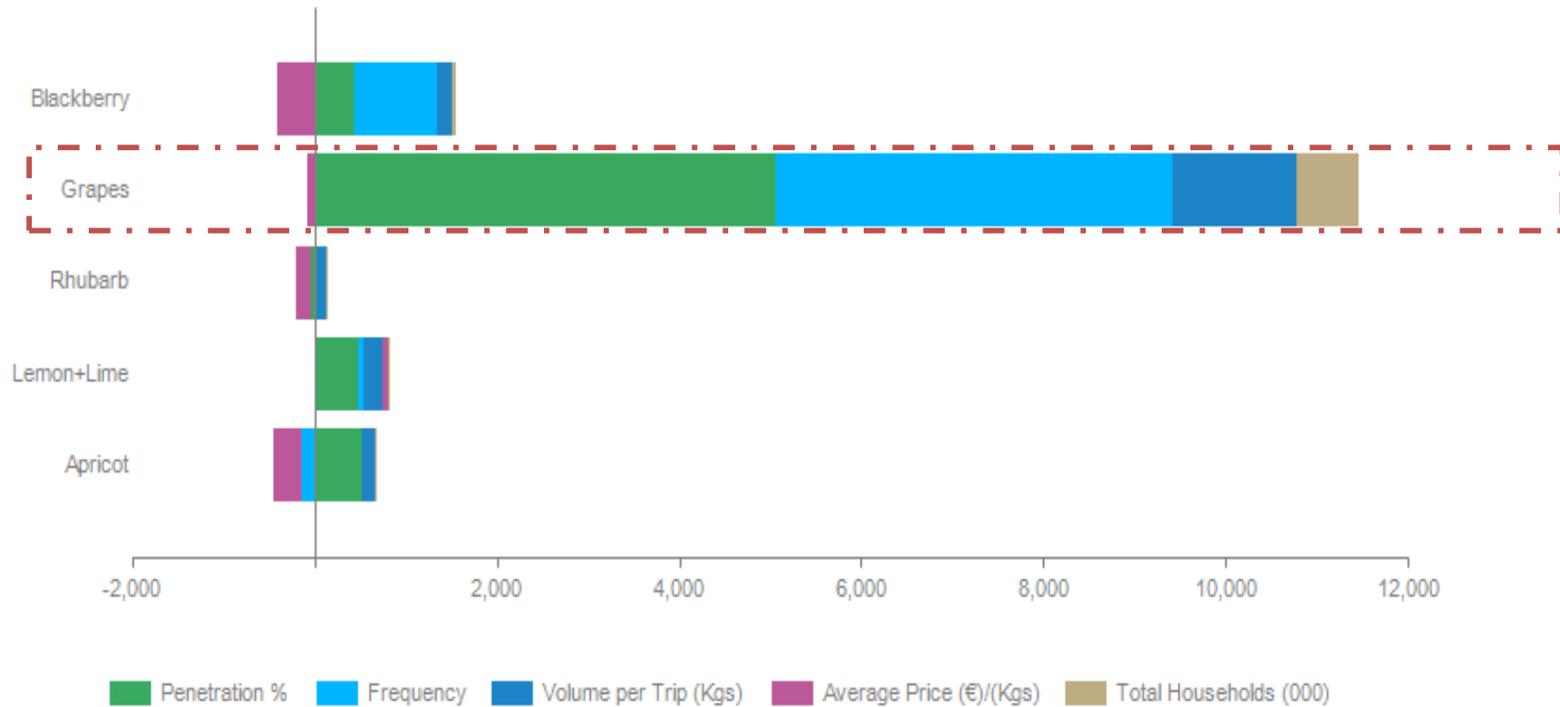




# What's driving the key winners? Penetration, volume and frequency

10-Sep-17 vs. Previous Year

Total Market | 52 w/e | Previous Year



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017





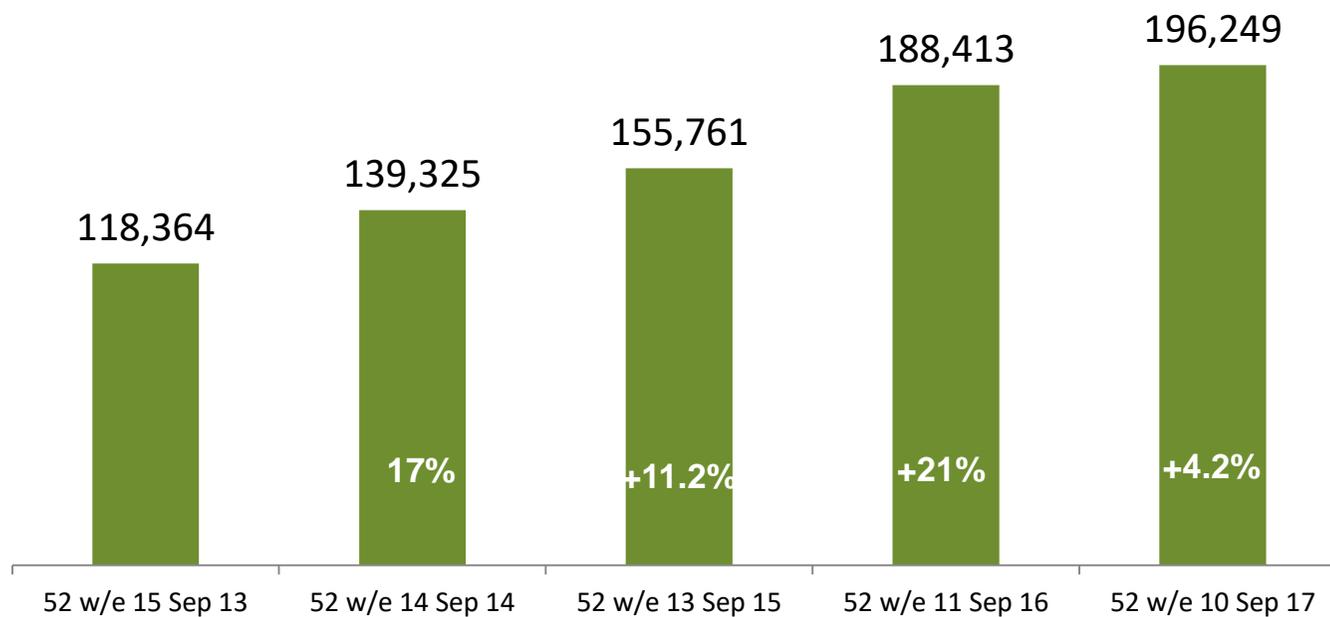
## Berries





## Berries - Strong yearly growth over a number of years

Value sales 000's



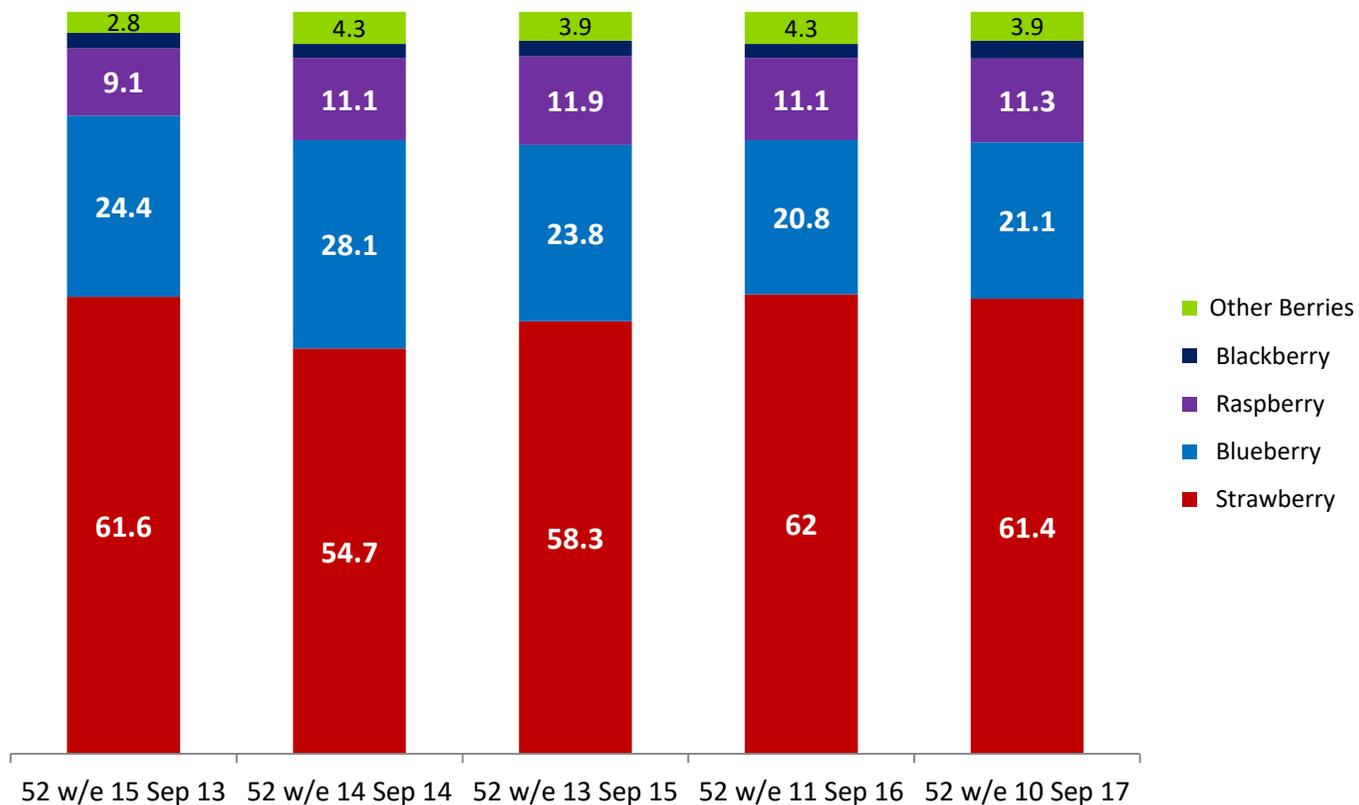
Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017





With the same growth evident for Strawberries in volume share.

% Volume share of Berries



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017





The top 3 retailers perform well in strawberries. Lidl over indexes in Raspberries when we look at Volume





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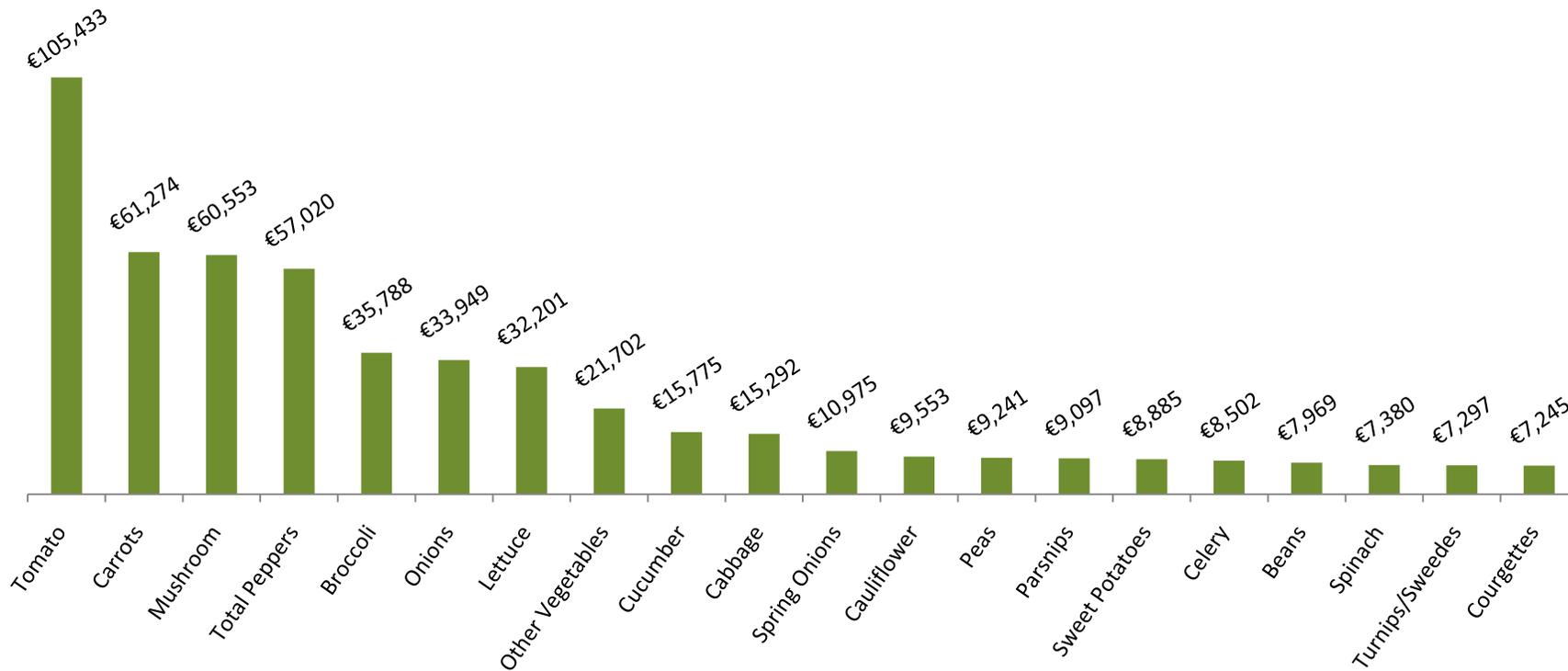
BORD BIA INSIGHT CENTRE

Digging a little deeper:  
*Vegetables*





# TOP 20 SELLING VEG – VALUE – 52w/e



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017



What Vegetables are Growing Most and Least? (Value % Change)

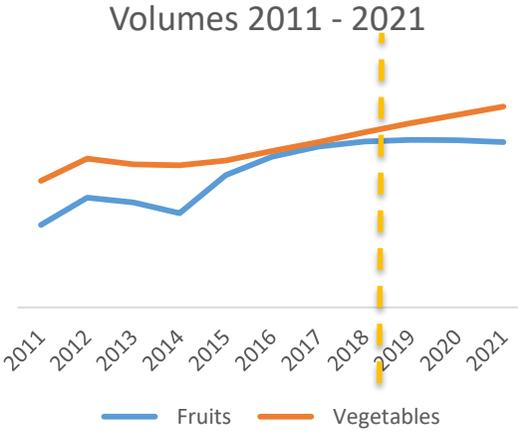
52 w/e 10 Sep 2017

TOP 10 VALUE GROWTH RATES		BOTTOM 10 VALUE GROWTH RATES	
Pumpkin	123.4	Brussel Sprouts	-10.1
Peas	46.5	Spring Onions	-11.4
Chicory	23.8	Chinese Leaves	-12.1
Asparagus	23.6	Sweet Potatoes	-14.7
Radish	13.1	Beetroot	-15.4
Parsley	11.4	Turnips/Swedese	-17.8
Sweetcorn	10.5	Leeks	-21.7
Garlic	8.6	Parsnips	-23.6
Broccoli	4.7	Artichokes	-41.8
Aubergines	3.9	Spring Greens	-76.1

Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017



# 5 Year Outlook



## 4% Volume Growth

*The Big Gainers  
(Next 5 Years)*

-  Cauliflower/Broccoli 10%
-  Maize 10%
-  Tomatoes 4%
-  Other Vegetables 4%



## 1% Volume Growth

*The Big Gainers  
(Next 5 Years)*

-  Blueberry/Cranberry 32%
-  Grapefruit 8%
-  Lemon/Lime 5%
-  Other Fruits 7%



*Cauliflower*

IS THE  
NEW KALE



The Thinking House

*Bord Bia*  
Irish Food Board



# Some Themes from New Product Launches in Past Year

(n=200+ Vegetable Launches, UK and IRL)



## Some New Brands



Waitrose World Deli  
Avocado Smash



Sainsbury's On the Go  
Carrot Batons



M&S Spirit of Summer  
Chargrilled Peppers



Waitrose 1  
Mild Sorrel & Chard Salad

## Top Themes On-Pack

**Vegetarian**

**Ease of Use**

**Ethical: Packaging**

**Seasonal**

## New Ingredients

**Hemp Seeds**

**Red Rice**

**Lacinato Kale**

**Millet**

**Brown Rice**

**Rice Starch**

**Wild Rice**

## Top Pack Types

**Trays on the rise**

**Tubs on the slide**

**Flexi Packs  
relatively stable**



**Trending >**

**Redlove Apple**



**Blood Orange**



**Cripps Pink**

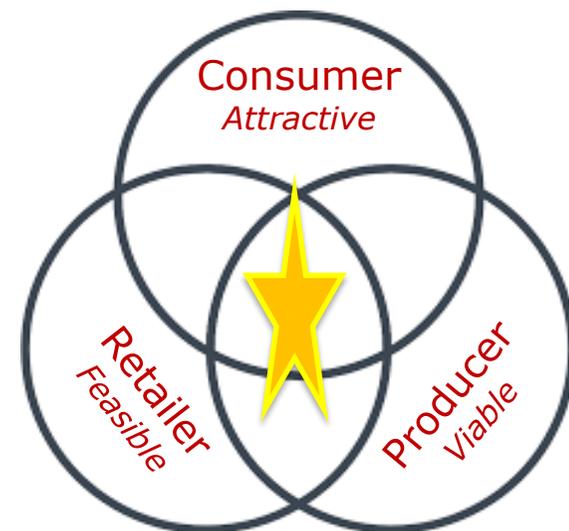




# So What?

Fresh Produce is in a healthy place overall, but we need to build on this and in particular re-invigorate vegetables.

- *Market Trends are favourable; Health & Wellness, Authenticity, Provenance, Local.*
- *BUT there is more we can do by working together at a sectoral level to build on this.*
- *Building a united platform for the sector on which to build a consistent theme and message: negotiating with retailers, appealing to consumers and attractive for producers.*





# Potatoes



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017

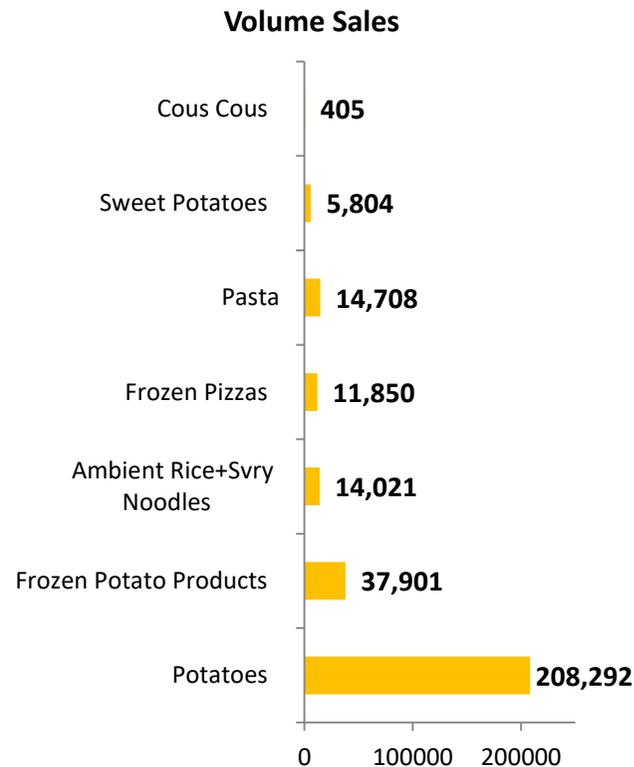
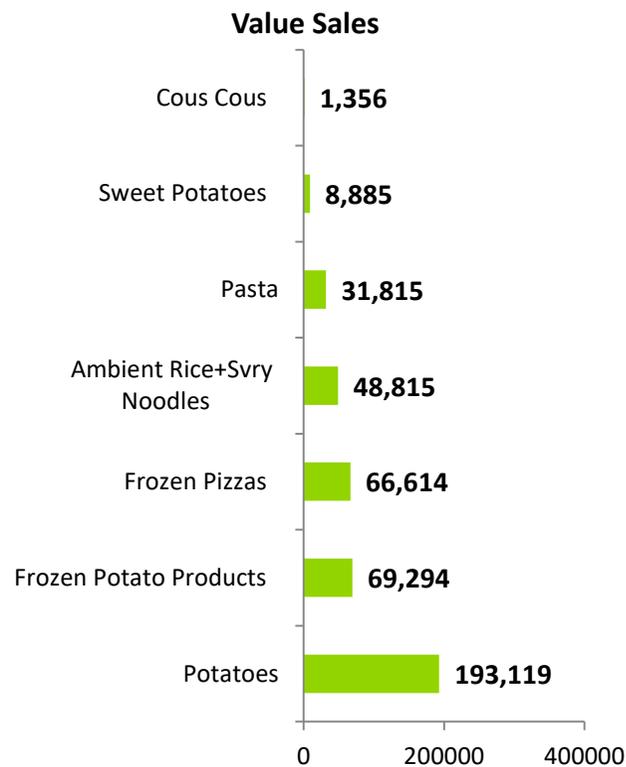


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Irish Food Board



# Potato still remains the leading Carbohydrate



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017



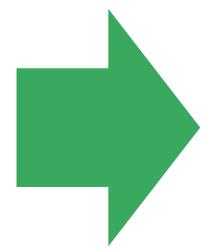


Potato Produce Key Performance measures  
 Total Potato Sales decrease by €7.3m as frequency and price drive the decline



Penetration

97.1% of ROI



Frequency

36.2 x year



Trip Volume

3.5 KG x trip



€

Price per KG

€0.93

-1%

-€4.9m

Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017



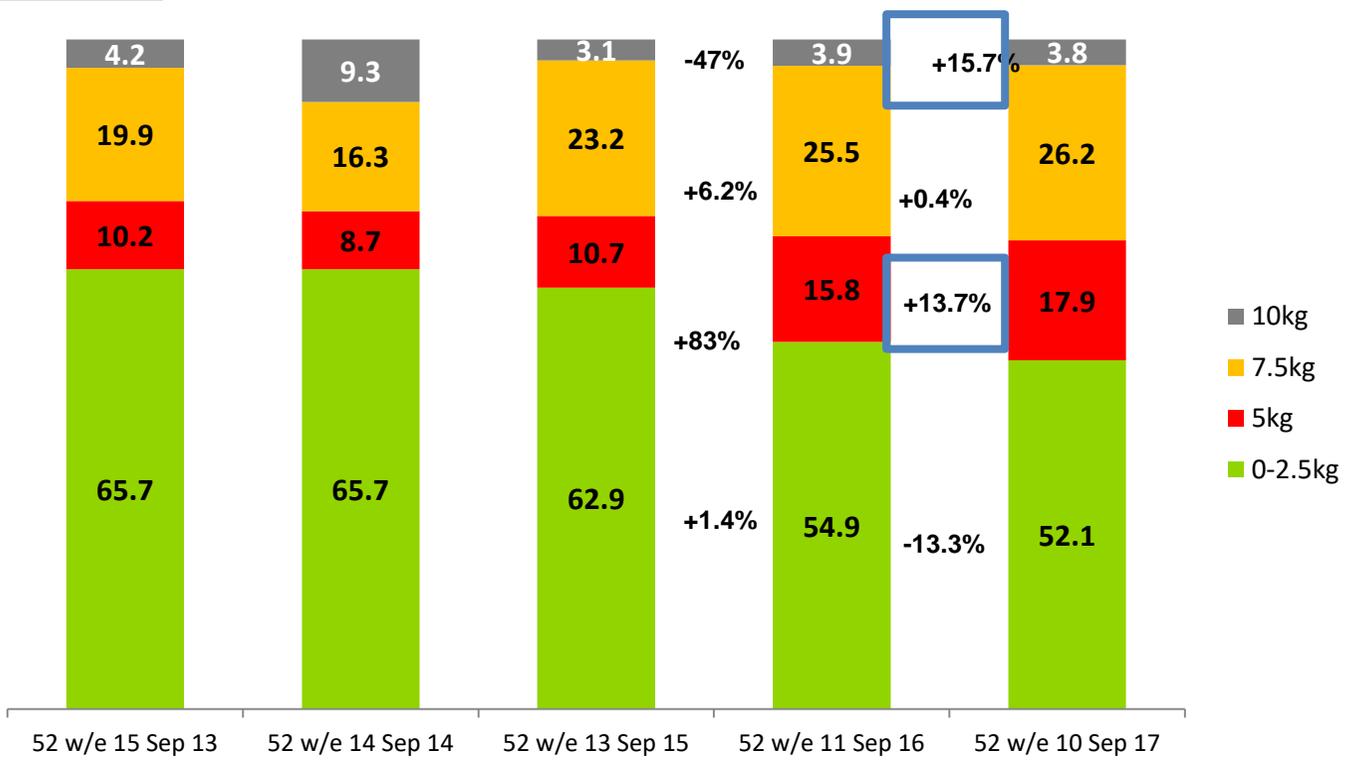


## Pack Size

10KG bags are growing their volume share by 16% this year.



% Volume Share



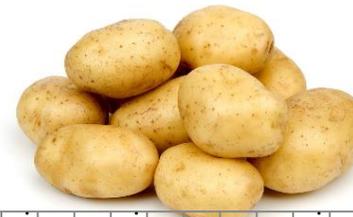
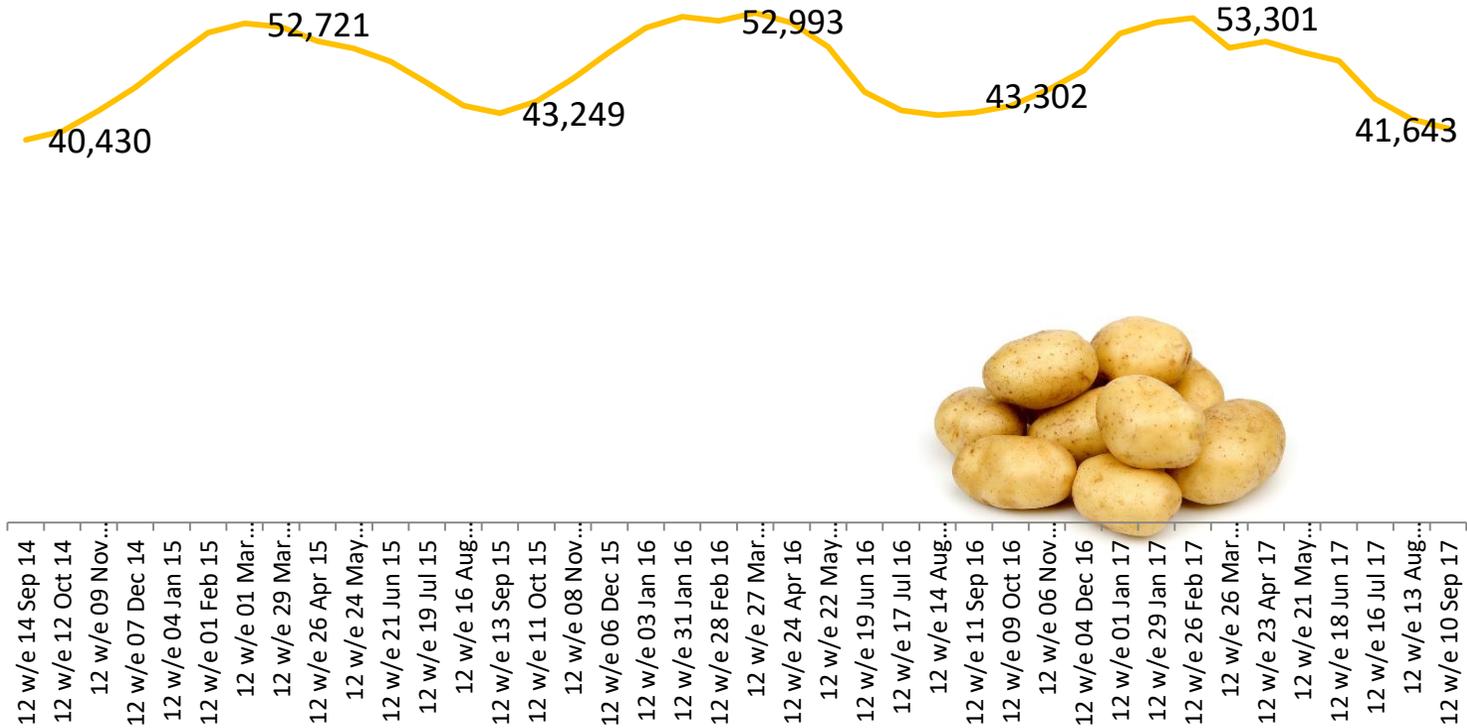
Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017





## Potato volume sales seasonally see a drop over summer months

Volume Sales 12 w/e



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017

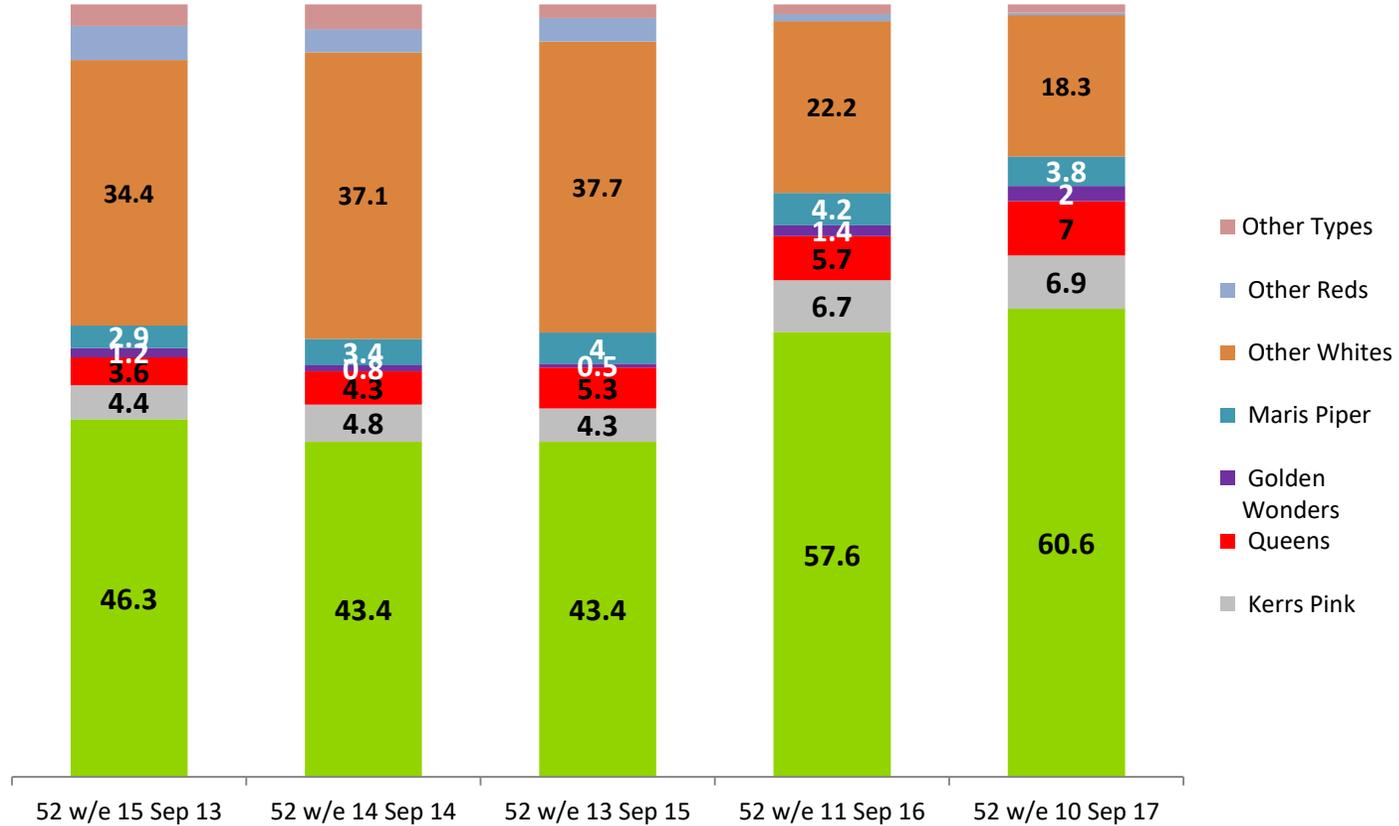




Roosters continue to gain share. Queens also gain share.



### Value Share



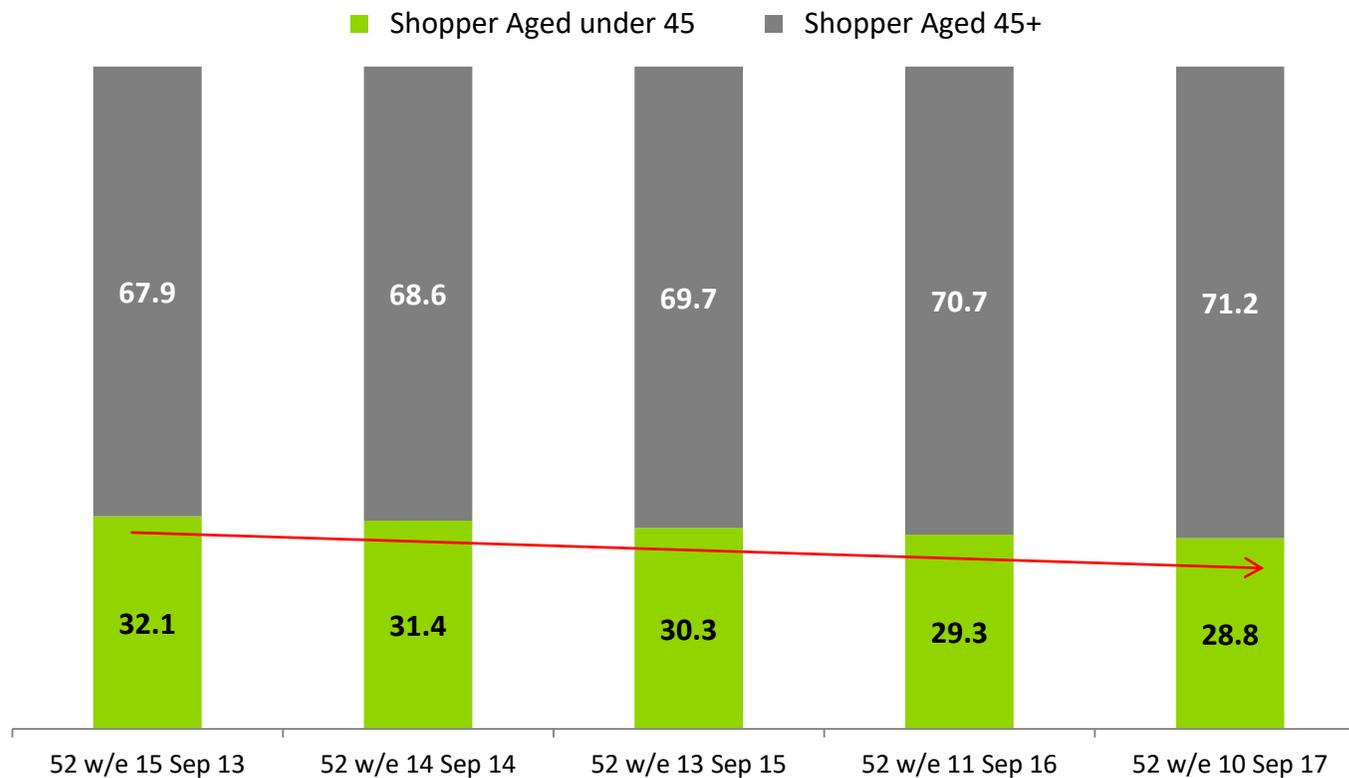
Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017





## Who is Buying Potatoes?

Over 70% of Potato shoppers are over the age of 45



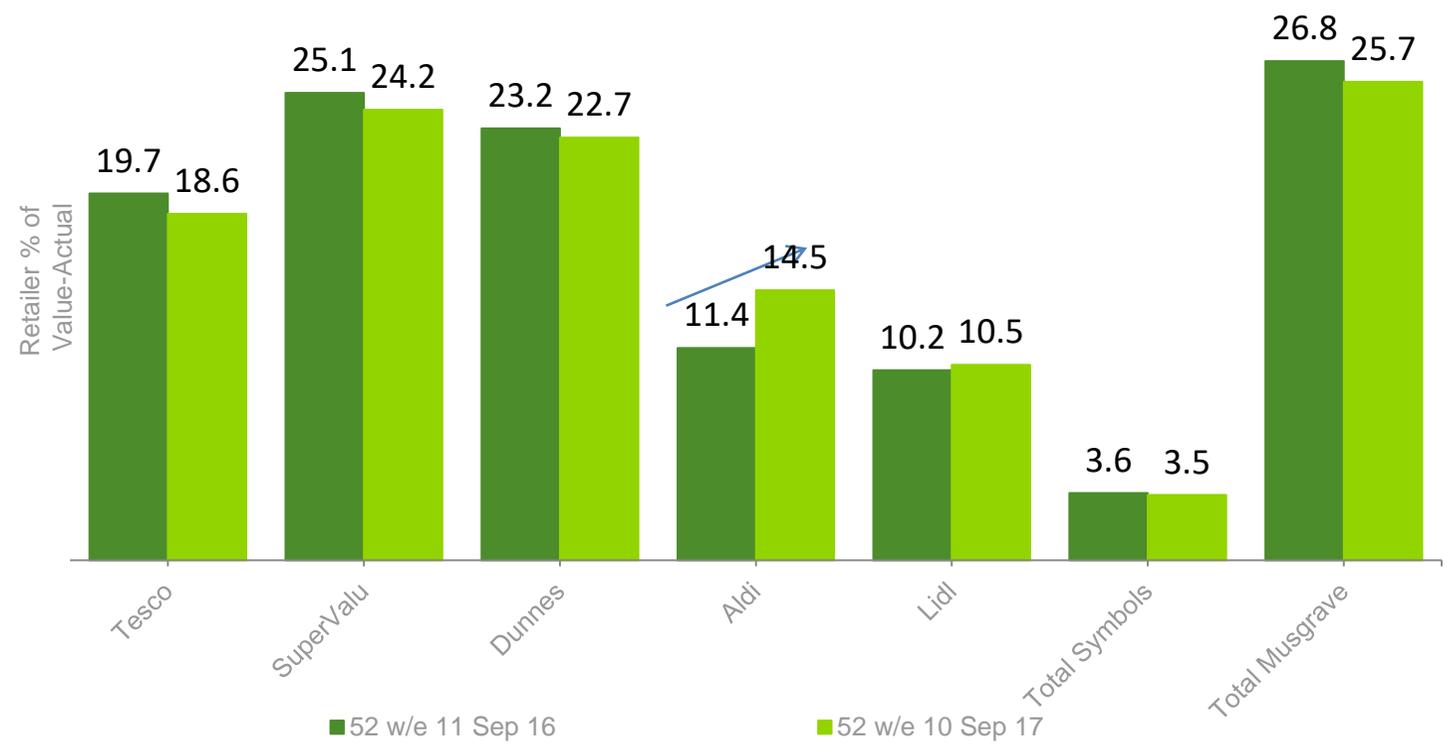
Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017





# Aldi and Lidl are the stand out performers this period, with Aldi gaining 3.1ppt

Retailer % of Value | Actual | Potatoes | 52 w/e



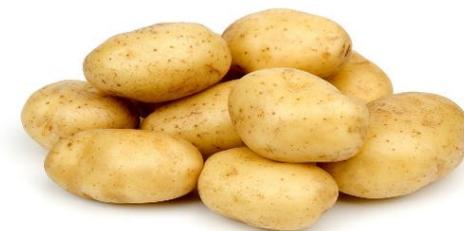
Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017

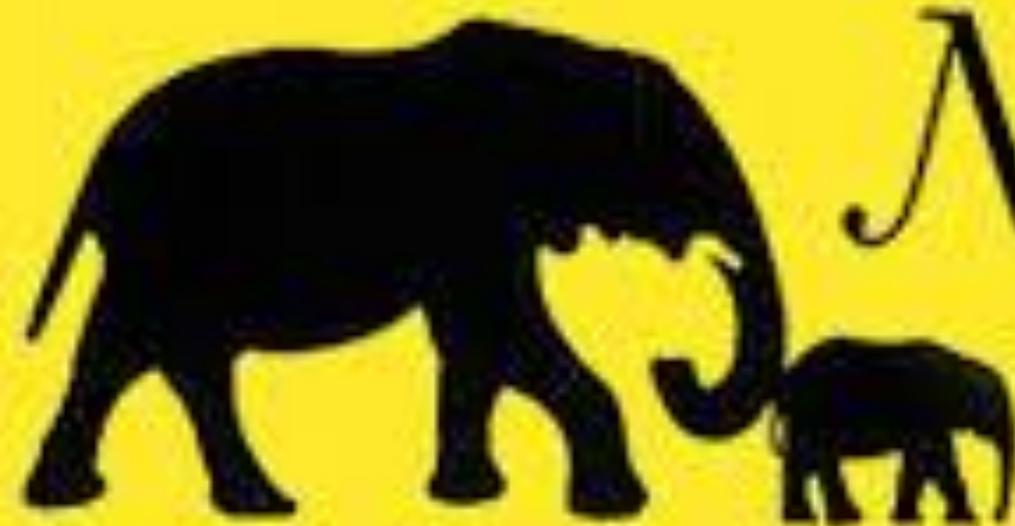




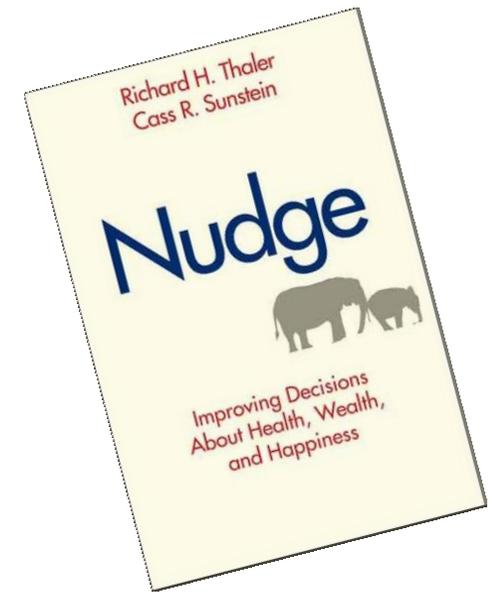
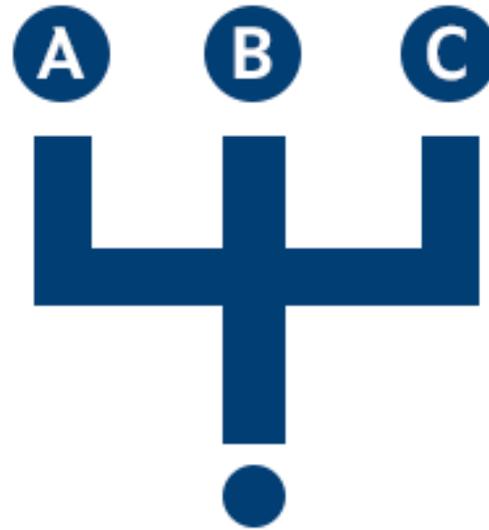
# So What?

1. Potato Growers Need to Reconnect with Gen X
  - *Easy, Versatile, Quick*
2. We Need to Hero Our Health Credentials
  - *High Fibre, Low Fat*
3. We Need to Build the “Herd”
  - *We are still by far Ireland’s best-loved carb*
4. We Need to Re-take & Educate re Authentic Sustainability
  - *Seasonal Varieties, Native Varieties*
5. We Need to Continue to Promote at a Category Level





*Nudge*



*“Any aspect of the choice architecture that alters people's behaviour in a predictable way without forbidding any options or significantly changing their economic incentives.”*

*(Richard Thaler)*



## **T** RANSMITTER

Choose the right messenger to reinforce the message



## **H** ABITS

Promote the development of new habits through new triggers and appropriate rewards



## **E** GO

Give value to the action by rewarding with recognition



## **D** EFAULT

Create a default choice sequence that leads to the desired behaviour



## **R** ECIPROCITY

Engage in a logic of reciprocity by creating a social debt



## **I** NCENTIVES

Encourage a behaviour with money, goodies or social reward



## **V** ALUE

Highlight the scope of work realised to justify the price



## **E** MOTION

Generate an emotional response through images, visuals and embodied stories



## **R** EWARDS

Reward with positive feedback



## **S** ALIENCE

Attract attention by making an item salient



## **O** NE STEP AT A TIME

Make the task seem easier by going on step at time



## **F** RAMING

Create a choice context that encourages the desired behaviour



## **I** MMEDIACY

Postpone constraints and efforts in the future while immediately providing advantages



## **N** OSTALGIA

Activate the feeling of nostalgia



## **F** AIRNESS

Show the fairness of the targeted behaviour



## **L** OSS AVERSION

Mention the loss provoked by not adopting the desired behaviour



## **U** PPER / LOWER ANCHORING

Generate favourable associations and reference points



## **E** ASINESS

Simplify the desired behaviour



## **N** ORMS

Encourage the need for conformity



## **C** OMPARTMENTALIZE

Materialise invisible flows (like efforts, expenses) with objects you can visually handle



## **E** NGAGEMENT

Generate commitments to promote consistency







### It's Election Day

Share that you're voting in the U.S. Election and find out where to vote.

[I'm a Voter](#)

[More Information](#)



## Warm buffet nudge

Fazer



When the carrots transformed into **"X-ray vision carrots,"** the kids crunched away 66 percent of them, but they ate only 32 percent of carrots with the the mild-mannered title "food of the day." In another study, lunchtime vegetable sales went up 99 percent in a school that offered **"Silly Dilly Green Beans"** and **"Power Punch Broccoli."**



<https://becr.sanford.duke.edu/a-loving-green-push-can-grocery-stores-nudge-us-to-buy-more-fruits-and-veggies/>

# Thought Starters

## **Norming**

“Join over one million Irish adults who eat more than 5 a day”

## **Rewarding**

Get a kiddie pack when you buy 5 veggies

## **Transmitter**

Spokesperson or ambassador effect: who can we work with? OT?

## **Default**

Choose three vegetables first... add meat etc

Pick one of these

## **Saliency**

Signposting and Standout: fun names and a fresh look.

## **One Step At A Time**

Add an extra new veg this week

Hero Veg of the week

## **Ego**

Be a Role Model for your kids

## **Rewarding**

Get a kiddie pack when you buy 5 veggies

## **Engagement**

Buy X amount of veggies every week for extra rewards points.

## **Nostalgia**

Craft the meal your granny made: stew vegetable promo

## **Framing**

Positive choices: tell them why, benefits





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Next Steps?

**THANK YOU**



MILLTOWN HOUSE  
MOUNT SAINT ANNES  
MILLTOWN  
DUBLIN 6

+353 1 205 7500  
info@banda.ie

[www.banda.ie](http://www.banda.ie)



**Bord Bia**  
Irish Food Board

# Opportunities for Growth Across the Irish Fresh Produce Market

Industry Presentation 24/11/2017

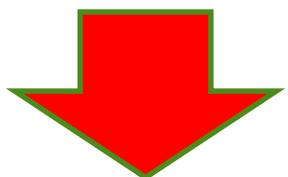
Lorcan Bourke – Bord Bia

Growing the success of Irish food & horticulture

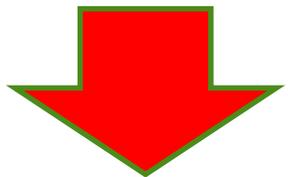
***Bord Bia***  
Irish Food Board

## The Industry Opportunity – Increase Consumer Consumption Levels

**3.5 portions**



**5-a-day**



**7-a-day**

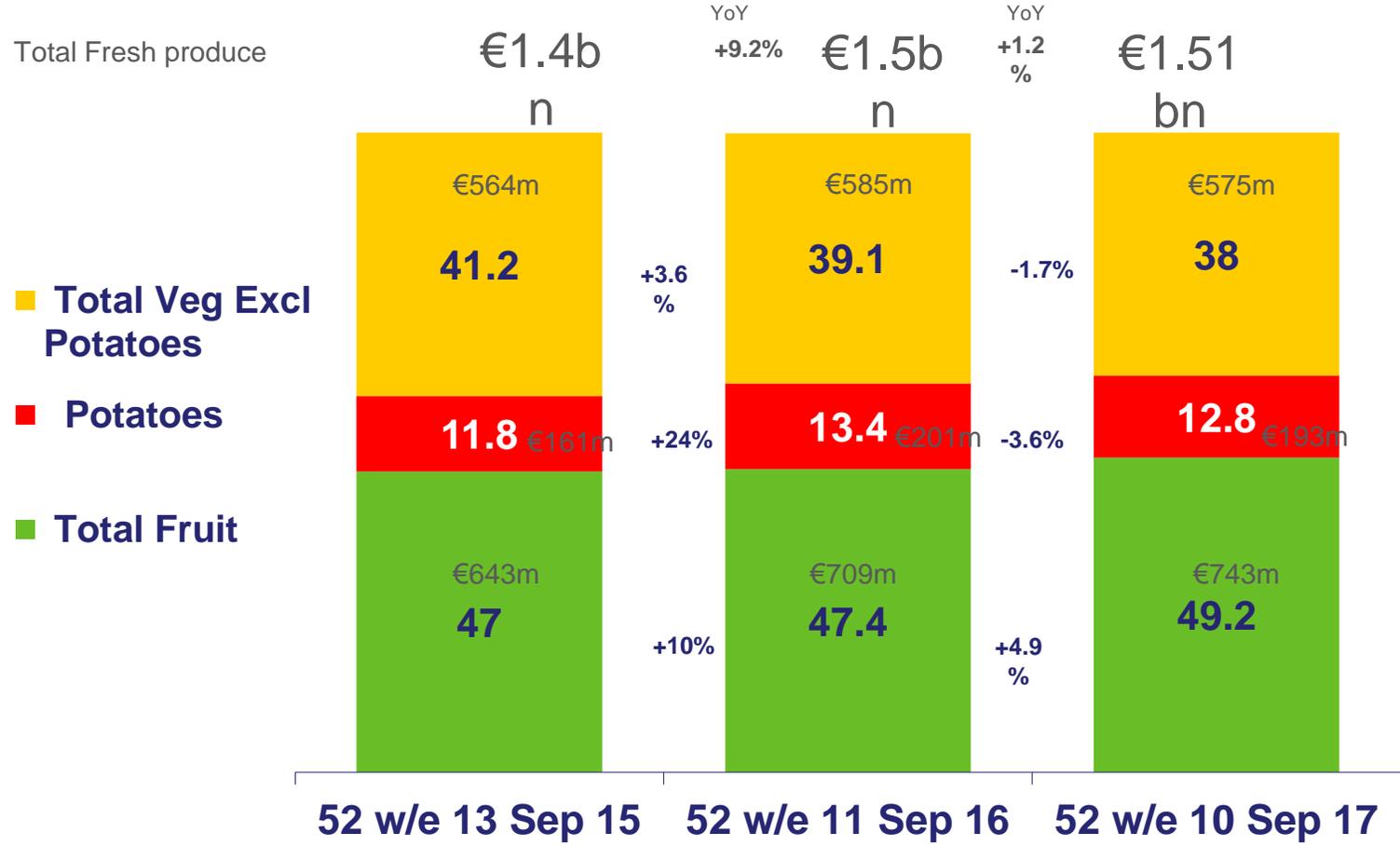
An effective  
doubling of  
consumption

*Eat 7 a Day*  
and live well



Positive Consumer Trends – it is Bord Bia’s view that future growth in the fresh produce market is very achievable

Total Fresh Produce Sector Split – Value



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017

The challenge for the Irish vegetable industry is to grow/supply existing and 'newer' veg profitably –given 'local/Irish' veg is in demand

(table illustrates value % change)

	(€) 000's	52 w/e 11 Sep 16	52 w/e 10 Sep 17	% change
1	Pumpkin	702	1568.2	123.4
2	Peas	6305.9	9241.2	46.5
3	Chicory	258.7	320.3	23.8
4	Asparagus	5382.5	6653.5	23.6
5	Radish	1159.6	1311.8	13.1
6	Parsley	1795.5	1999.6	11.4
7	Sweetcorn	5780.1	6389.8	10.5
8	Garlic	6540.6	7104.6	8.6
9	Broccoli	34184	35788.4	4.7
10	Aubergines	1639.9	1704.6	3.9
11	Cucumber	15177.5	15775.2	3.9
12	Mushroom	58662.4	60552.5	3.2
13	Courgettes	7080	7245	2.3
14	Spinach	7243.5	7379.8	1.9
15	Cauliflower	9422.7	9553.4	1.4
16	Tomato	104789	105433.3	0.6
17	Carrots	61558.4	61273.8	-0.5
18	Kale	3556.3	3520.9	-1
19	Lettuce	32706.7	32200.9	-1.5
20	Total Veg Excl Potatoes	585259.3	575266.7	-1.7

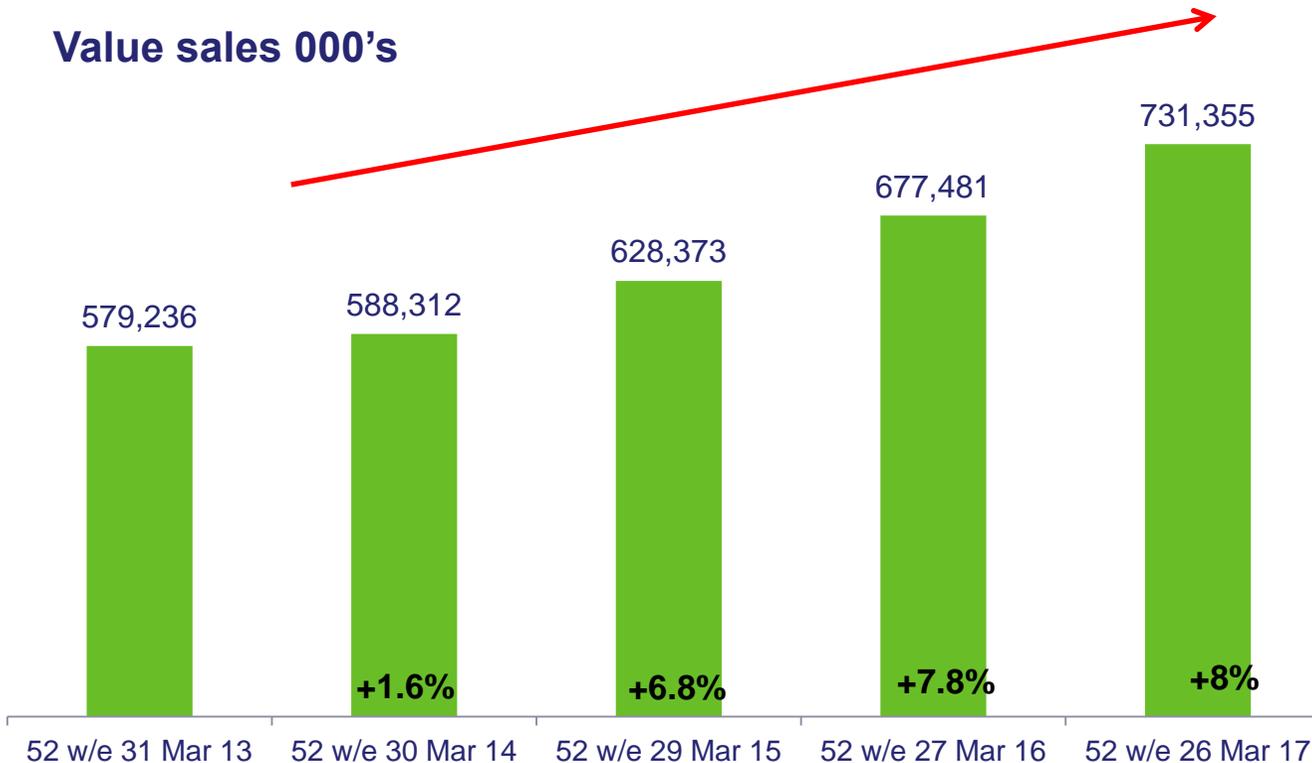
There has been big growth in the variety of fresh produce being offered

Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017

Fruit segment – There has been yearly growth for a consistent number of years, veg not as high – but there is huge potential to grow the fresh produce category even stronger.....



Value sales 000's



# OPPORTUNITIES FOR GROWTH IN THE IRISH FRESH PRODUCE CATEGORY

1. Health and Wellness in relation to Nutrition /Diet ~ functionality of food re; body image
2. Meal Occasions – across the day breakfast, ‘snacking culture’, lunch, dinner, supper/evening
3. Convenience
4. Value Added & ‘Ready-to-Eat’ concepts
5. Taste
6. Caring Demographics “Social Conscience”: Safe Food, Clean Environment & Sustainable production. Millennials/Centennials seek truth around authenticity around origin, naturalness and traceability in the fresh produce supply chain
7. Direct selling locally produced/fresh harvested [+/- Organic status]
8. Marketing Irish Provenance [Irish brands & labels, packaging formats, product USP, colour]
9. Foodservice – strong growth rates
10. (Generic) Promotion of Health Benefits and Usage (recipes) – EU funded campaigns



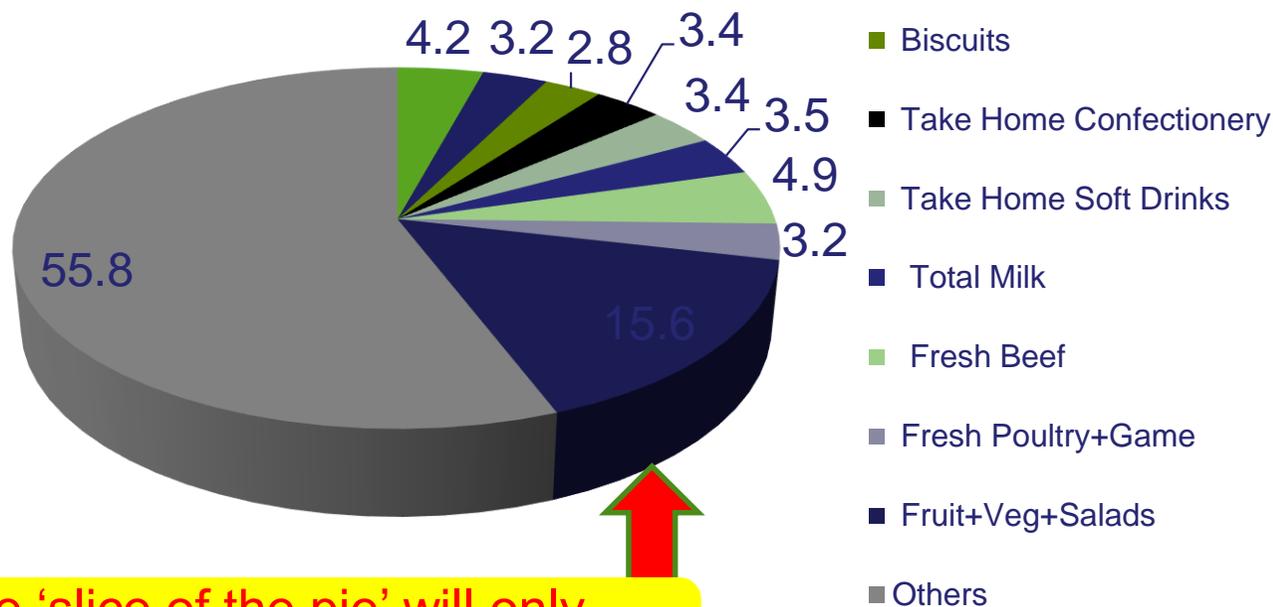
## 1. Health & Wellness Trend: Increased Consumer Interest in Eating Healthier



**1. Combined, Fruit & Vegetables account for 15.6% of total grocery spend in Ireland. There exists a positive public view of fruit & vegetables in the diet with predicted strong growth rates for the category**

52 week Total Grocery

**% Value share**



**Fresh produce 'slice of the pie' will only increase in the future**

Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017

## 2. Broaden the Usage of Fruit ' n' Veg across all Meal Occasions

Overview of fresh produce consumption behaviour – Past 3 days

Base: All respondents

Huge gaps in fresh produce consumption across all meal occasions... .. Points to habitual consumption and knowledge gaps

Fresh...	EAT AT ALL AT...			
	BREAKFAST	SNACKING	LUNCH	DINNER
	%	%	%	%
<b>Fruit</b>	<b>45</b>	<b>68</b>	<b>39</b>	<b>23</b>
<b>Vegetables</b>	<b>7</b>	<b>12</b>	<b>47</b>	<b>78</b>
<b>Potatoes</b>	<b>3</b>	<b>2</b>	<b>19</b>	<b>65</b>
<b>Salad</b>	<b>3</b>	<b>7</b>	<b>47</b>	<b>27</b>

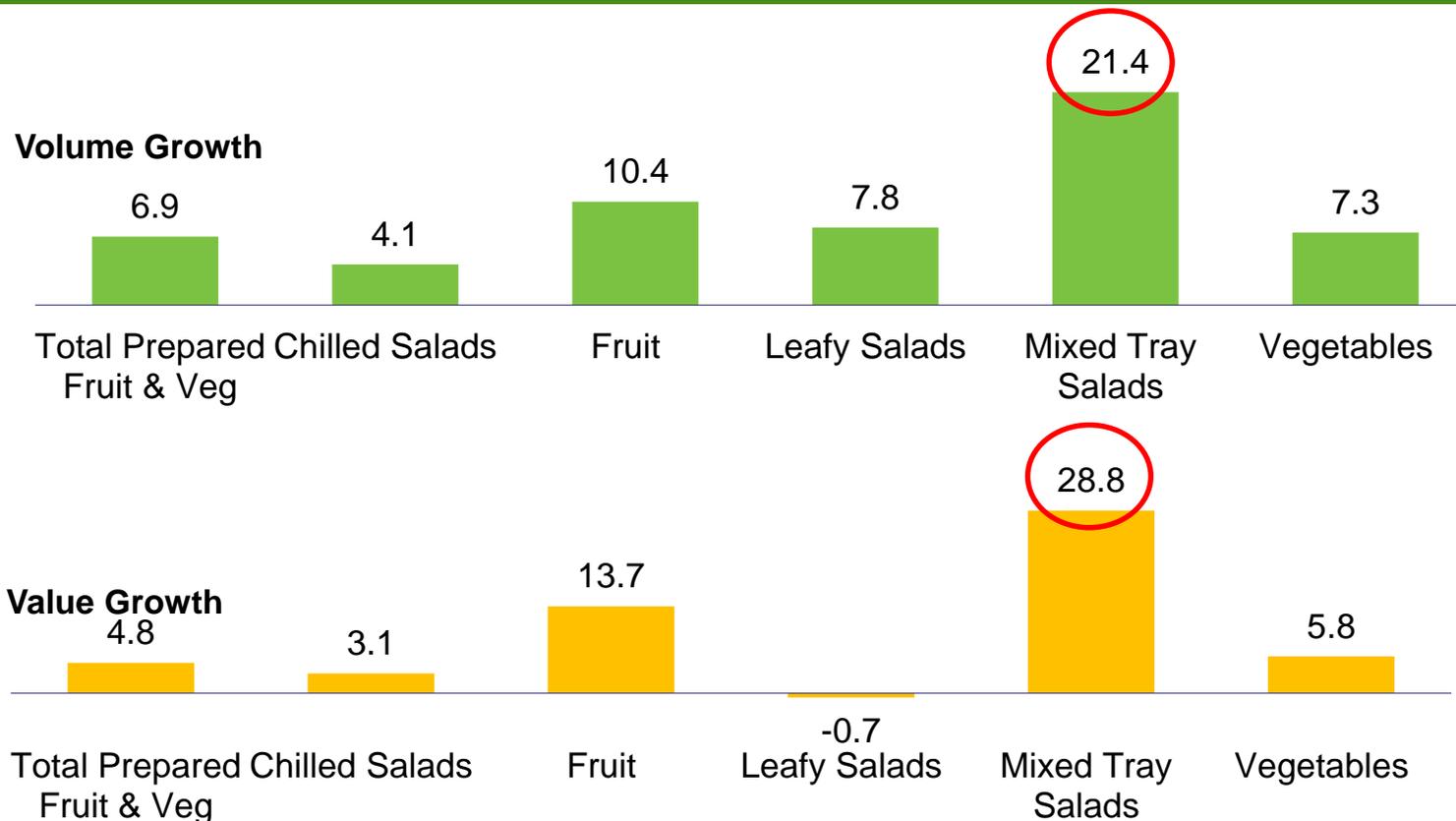
Example: Usage of Fruit ' n' Veg Across as for Healthy Snacking...

# Snack

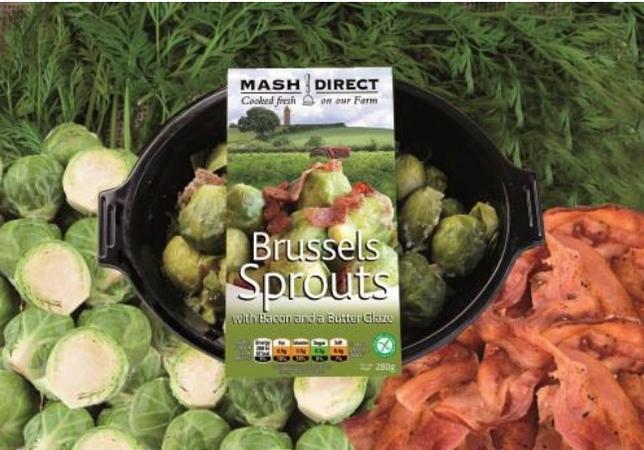


### 3. CONVENIENCE: PREPARED FRUIT & VEG SALADS – IS IN STRONG SECTOR GROWTH (+7% volume yoy)

- Mixed tray Salads are seeing the strongest growth in both Value and Volume terms



Kantar Worldpanel Data to 10<sup>th</sup> Sept 2017



# MASH DIRECT

*Cooked fresh on our Farm*



The Thinking House

**Bord Bia**  
Irish Food Board

# Carrot Cuts

## 4. Value Added 'Ready to Eat' veg – e.g. carrots in the USA



## 5. Taste & Combinations of Flavours – identify what's uniquely Irish and promote it as such

Example: Success of the Rooster potato – consumers buying a 'bag of Roosters' (Irish grown) not potatoes



6. Millennials/Centennials (Generation Z) seek truth around origin, naturalness re; the fresh produce supply chain

The  
Connected  
Generation



An under  
consuming  
demographic



## 7. Direct selling locally produced/freshly harvested: In retail & foodservice facilitated by on-line channels/technology & 'Destination' Shopping



# 8. Marketing Irish Provenance – tell your own story!





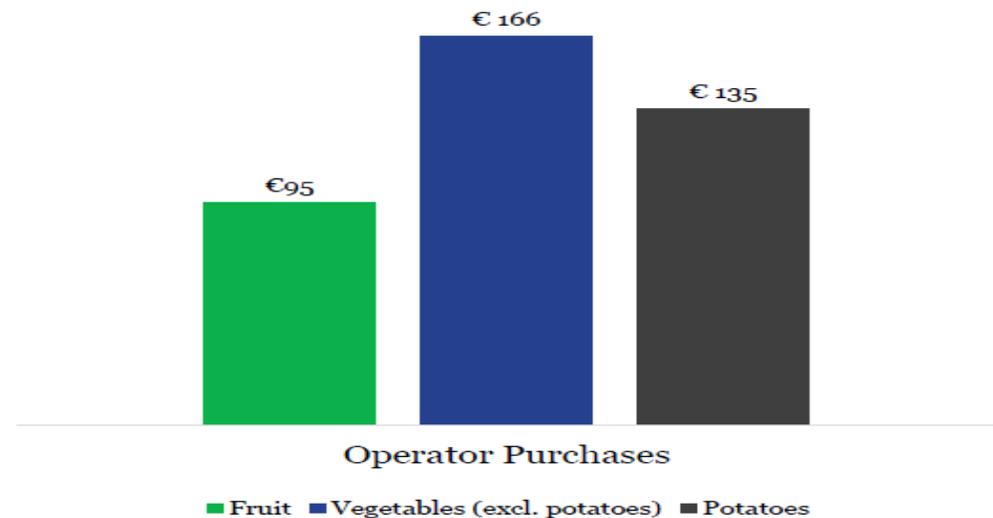
# 9. Global Foodservice Growing at 5.6% p.a.

## 2017 Value & Purchase

**Operators are estimated to spend €396 million on fruit and vegetables**

Total produce purchases in the island of Ireland amount to €396 million, with fruit accounting for 24% of purchases, vegetables (excluding potatoes) accounting for 42% and potatoes 34% of operator purchases.

2017 Produce in Foodservice  
€396 Million





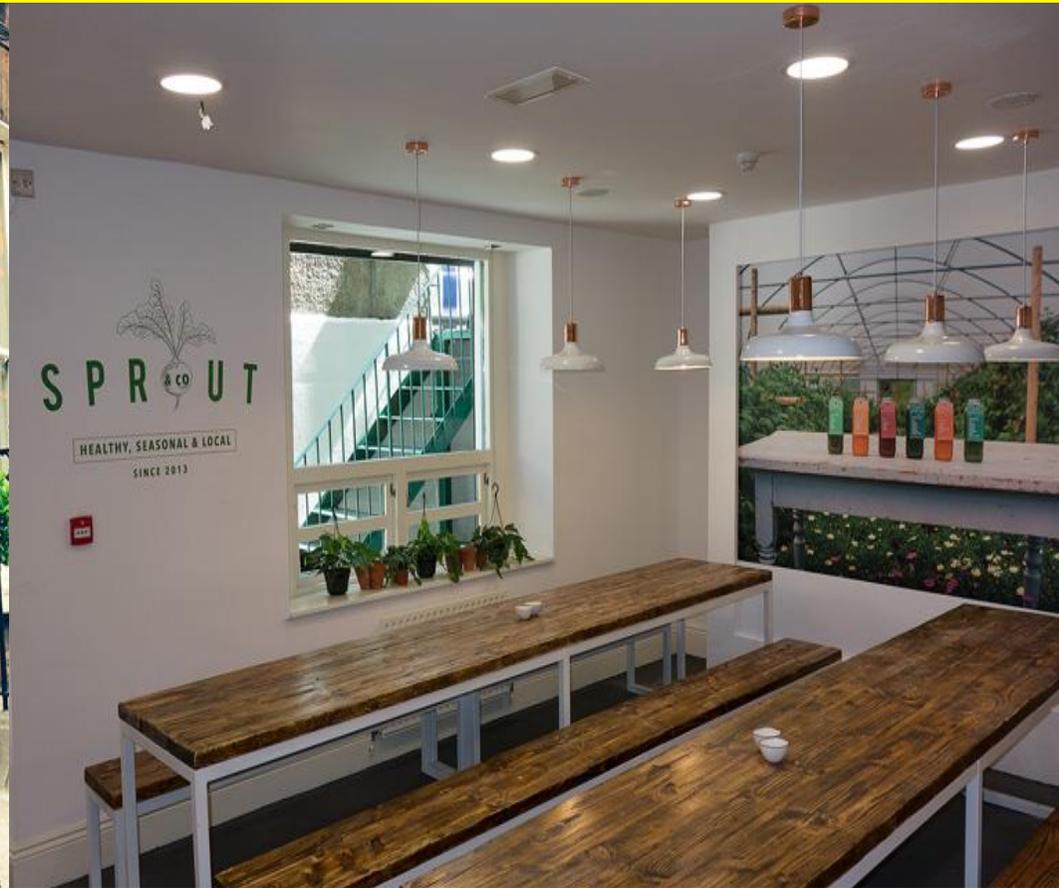
From farm to fork, at The Draft House, we pride ourselves on using local, organic and artisan food suppliers in order to offer our customers an exceptional sensory experience.



The Thinking House

*Bord Bia*  
Irish Food Board

# 10. Healthy, Seasonal & Local (Irish) – a USP in foodservice



## 10. Generic Promotion

*Eat 7 a Day*  
and live well



# Bloom – Promotion of 7-a-day & Healthy Eating



# Quality Assurance & Sustainability Marks



# EU Supported Produce Campaigns



**Mushrooms. So many B vitamins, they could make a tomato blush.**

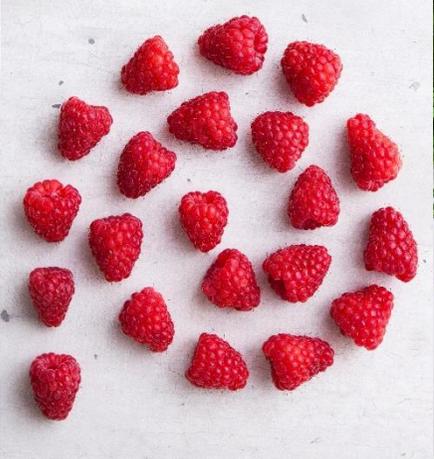
Mushrooms aren't just tasty, you know. They're also really good for you. They're a natural source of minerals and vitamins B2, B3 and B5, which help you build a stronger immune system. And as they're low in fat, low in calories and just 80g counts as a quick way to one of your five-a-day, they're the ideal filler-upper.

Over 250 tasty recipe ideas at [moretomushrooms.com](http://moretomushrooms.com)



Campaign financed with aid from the European Union.





**Bord Bia**  
Irish Food Board

# EU Promotions

Michal Slawski, Development and Marketing Specialist

Growing the success of Irish food & horticulture

*Bord Bia*  
Irish Food Board

# Overview

- ✓ Recent EU promotions
- ✓ New EU Promotion Scheme

# UK 'More to Mushrooms' Campaign

- ✓ Value €2.4 million over 3 years
- ✓ 50% funded by producers and marketing companies in Ireland and the UK
- ✓ 50% funded by the EU
- ✓ Support from Bord Bia
- ✓ First burst of activity was January 2011

# UK 'More to Mushrooms' Campaign



## Mushrooms. So many B vitamins, they could make a tomato blush.

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Growing the success of Irish food &



Campaign financed with aid from the European Union.

# More to Mushrooms

*“Growth in the total market overall was 28,000 tons - the program target was met and exceeded by 5,000 tonnes”*

# Just Add Mushrooms

- ✓ The 3 year €2.7 million 'Just Add Mushrooms' in the UK and Ireland started on the 16th of July 2013 – 50:50 funded by the EU and the industry



Campaign Financed with Aid  
from the European Union  
and British and Irish Farmers

*just add* MUSHROOMS

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Irish Food Board

# Action 1 Magazines

★ **NADIA'S** ★

CREAMY MUSHROOM AND BACON PASTA BAKE

*"My family's favourite midweek supper. A creamy mushroom and bacon pasta bake. It's so simple!"*

**INGREDIENTS**  
(serves 4 people)  
500g bag fusilli pasta  
300g closed cup mushrooms  
150g fresh or frozen peas  
200g bacon  
50g cheddar  
600ml cheese sauce

Cook the pasta and peas according to pack instructions and set aside. Pre-heat the oven to 200C/fan 180C/gas 6.

Fry the mushrooms with a knob of butter for two minutes and spoon onto a plate. Fry the chopped bacon for a further four minutes and leave to one side.

Tip the pasta, mushrooms and bacon into a large ovenproof dish. Pour over a basic cheese sauce and mix with peas. Top with grated cheese and bake for ten minutes until golden brown.

**just add MUSHROOMS**

NOT ONLY are mushrooms a natural source of vitamin B5 (helping to reduce tiredness and fatigue), they are also low in fat. Just 80g or about four mushrooms make up 1 of your 5 a day. For inspiration on how you can enjoy mushrooms as part of a balanced diet, please visit [www.justaddmushrooms.com](http://www.justaddmushrooms.com)

★ **NICKY BYRNE'S** ★

BBQ MARINATED MUSHROOM KEBABS

*"My family's summer treat. BBQ marinated mushroom kebabs. They're so easy!"*

**INGREDIENTS**  
(serves 4 people)  
450g closed cup mushrooms, trimmed & wiped  
500g chicken breast, diced  
3 mixed peppers, cut into large cubes

Marinade:  
75ml olive oil  
4.5ml balsamic vinegar  
3 cloves garlic, finely chopped  
2 tbsps freshly chopped parsley (optional)  
Salt & freshly ground black pepper

Mix marinade ingredients together in a large bowl.

Add mushrooms, chicken and red peppers and stir until well coated. Cover and leave to marinate for at least 30 minutes, stirring occasionally.

Thread onto 8 skewers alternating the mushrooms, chicken and peppers. Cook on a sheet of foil on a medium hot barbecue or under the grill for about 6-7 minutes on each side.

**just add MUSHROOMS**

NOT ONLY are mushrooms a natural source of vitamin B5 (helping to reduce tiredness and fatigue), they are also low in fat. Just 80g or about four mushrooms make up 1 of your 5 a day. For inspiration on how you can enjoy mushrooms as part of a balanced diet, please visit [www.justaddmushrooms.com](http://www.justaddmushrooms.com)



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# Action 2 Digital



Jamie Oliver®

NIGELLA allaboutyou



iVillage

goodtoknow Google™

TESCO  
Real Food

WeightWatchers®

[www.tescodiets.com](http://www.tescodiets.com)



Campaign Financed with Aid from the European Union and British and Irish Farmers



just add MUSHROOMS

Growing the success of Irish food & horticulture

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Irish Food Board

# Action 3 - PR

**JODIE'S**  
MUSHROOM AND SAUSAGE CASSEROLE

“A tasty family casserole in 30 minutes – perfect!”

just add

Cover Photo

More To Mushrooms  
Food/Drink

Watch Video Liked Message

Timeline About Photos Likes More

PEOPLE Post Photo / Video

98,060 likes

Write something...

**JODIE'S**  
MUSHROOM AND SAUSAGE CASSEROLE

“A tasty family casserole in 30 minutes – perfect!”

just add

Just Add Mushrooms  
@MoreToMushrooms

TWEETS 996 FOLLOWING 1,080 FOLLOWERS 1,827 FAVORITES 114 LISTS 1

Follow

Tweets Tweets & replies Photos & videos

Dinner Tweet



Campaign Financed with Aid from the European Union and British and Irish Farmers



Growing the success of Irish food & horticulture

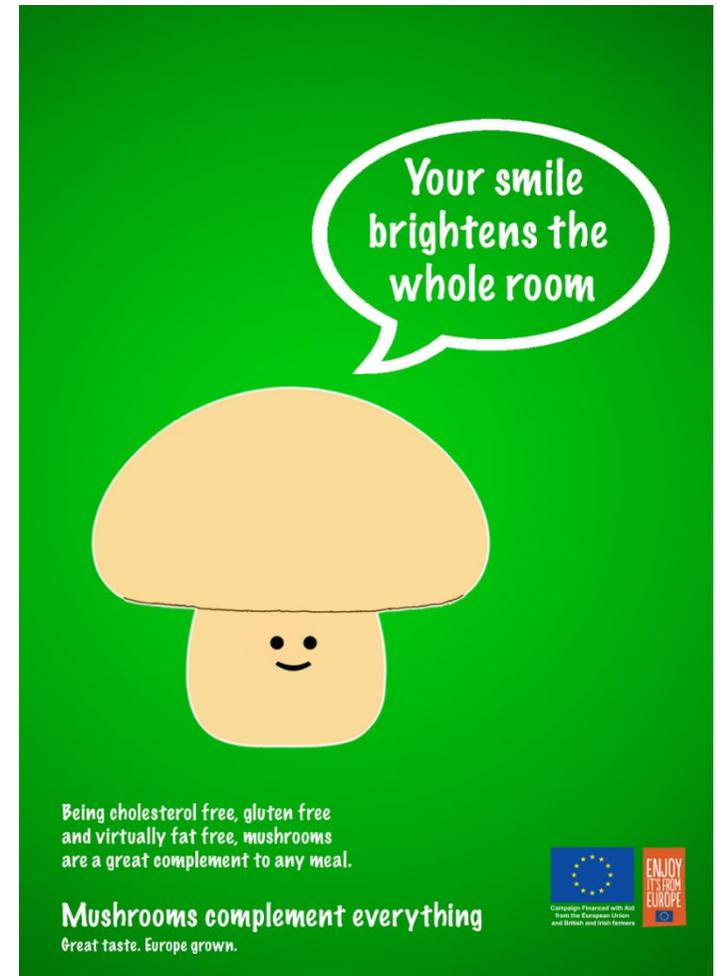


# Just Add Mushrooms

*“The Just Add Mushrooms campaign saw an increase in the cumulative volume of sales in the combined markets of 30000 tonnes since the campaign began, 22500 tonnes in the UK and 7700 tonnes in Ireland compared to the baseline figures in 2013”*

# Mushrooms Complement Everything

- ✓ €2,025 million over three years
- ✓ Funded 70% by the EU and 30% by the industry
- ✓ Concentrating heavily on social media and PR



# ‘Potatoes – more than a bit on the side’



Growing the success of Irish food & horticulture

*Bord Bia*  
Irish Food Board

# 'Potatoes – more than a bit on the side'

3 Year Potato Promotion Budget €1,000,000

- ✓ EU.....500,000
- ✓ DAFM...90,000
- ✓ IPF.....205,000
- ✓ IFA/Growers .....205,000

# More Than A Bit On The Side

Print Advertising

Online & Mobile Advertising

Website hub

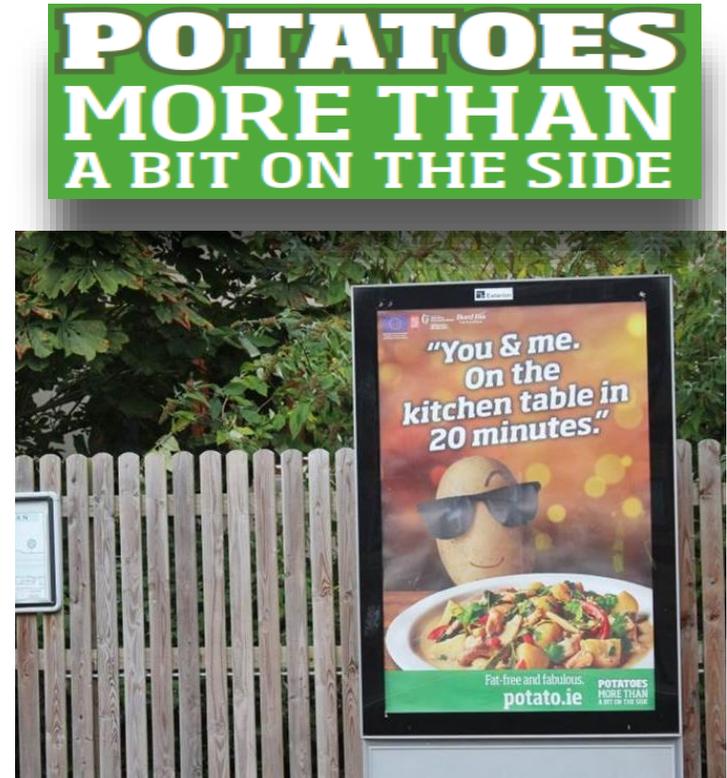
PR

Social Media

SEO & PPC

Ambassadors

# Outdoor Poster Advertising



**Dublin bus stops (x 50); Dublin retail car parks (x75); Dublin Dart (x40)**

*Reach (no. of T.A. people): 785,623 ; T.A. Frequency of Seeing it: 11.6 ; Impacts (total no. of times people in T.A. would have seen it): 9,109,884 ;*

# Press Advertising



RTE Guide

Glamour

Good Food

Ireland Only Titles: RTE Guide

Shared GB Titles: Glamour; BBC Good Food

Growing the success of Irish food & horticulture

# PR Coverage

# POTATOES MORE THAN A BIT ON THE SIDE

## IRISH DAILY Mirror

### Humble spud is still our champ..

Irish to fork out €170m on home-grown potatoes this year

**BY CORMACK O'SHEA**

The new potato season is upon us and Irish consumers are set to spend an eye-watering amount on home-grown spuds this year.

Kantar Worldpanel revealed people here will fork out €170million on the vegetable in 2016, buying 120 million tonnes.

On average people will purchase potatoes on 25 different occasions meaning each consumer will buy on average 1.9kg per year.

Farmers across the country are beginning to harvest their famous Queen's Hill variety.

And dietician Aoife Hearne has urged us to eat plenty of spuds as they are extremely healthy for people of all ages and can be taken every day as part of a balanced diet.

She said: "They are naturally fat free and gluten free and a great source of fibre, vitamin C and a variety of B vitamins. "One of the key things we want is carbs that are high in fibre and potatoes are a great fibre source."

**RECIPES**

"It's really important we dispel the myth they are fattening. Spuds provide people with a very important source of

## THE IRISH Sun

### Monster mash-up

IRISH spud-lovers are on course to spend €175million on potatoes this year – with demand about to be fuelled by the new season crop.

The first of 20,000 tons of home-grown 'Queens' are expected to hit the grocery aisles this week after a cold spell in spring delayed the harvest by a fortnight.

TV nutritionist and Bord Bia ambassador Aoife Hearne yesterday insisted the spud is more than a "bit on the side".

Launching 20 summer recipes on potato.ie, she said: "They are naturally fat-free and gluten-free and a great source of fibre, vitamin C and a variety of B vitamins."

## Irish Daily Mail

### No need to fear spuds! Potatoes are not fattening

**By Ruth Gahan**

A LEADING dietician has urged women to dismiss the idea that potatoes are fattening and to embrace the humble spud instead.

New season potatoes will begin appearing on shopping lists and menus this week, as growers harvest the first crop of the popular 'Queens' potatoes.

The variety of spud has come into season two weeks later than usual due to colder temperatures in the spring and consumers are expected to buy more than 20,000 tonnes over the coming months.

Aoife Hearne, resident dietician on Operation Transformation, said that many people – and young women in particular – are reluctant to eat potatoes for fear of gaining weight.

She said this is a mistaken belief that is keeping people from enjoying what she says is a wonderful food.

"It's really important that we dispel the myth that potatoes are fattening," Ms Hearne said.

"Potatoes are naturally fat-free and gluten-free and a great source of fibre, vitamin C and a variety of B vitamins. They also contain three times the amount of potassium of bananas. Potatoes and all carbohydrates can be made healthy as long as they are eaten in moderation."

Stressing the importance of a



TV DIETICIAN SERVES UP A FRESH LOOK AT IRISH POTATO RECIPES



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**Bord Bia**  
Irish Food Board



# 'Potatoes – more than a bit on the side' results

*The target to increase sales by 41 000 tonnes by the end of the campaign is well on target to be achieved by the end of year three.*

# New EU Promotion Scheme

2018 budget of €188,5 million:

The EU grant is limited to the following maximum co-funding rate of:

- ✓ for simple programmes in the internal market: 70 % of the programme's eligible costs
- ✓ for multi programmes in the internal market: 80 % of the programme's eligible costs

# EU Beef & Lamb Promotion Asia



- Investing €3.8m from 2017 - 2019
- Drive demand in China, Japan, Hong-Kong
- Regional Exhibitions & Trade Shows
- Seminars and Buyer Events
- Building Online and Printed Promotional Presence
- Itineraries for Journalists, Trade & Officials

# New EU Promotion Scheme

## ✓ Simple programmes

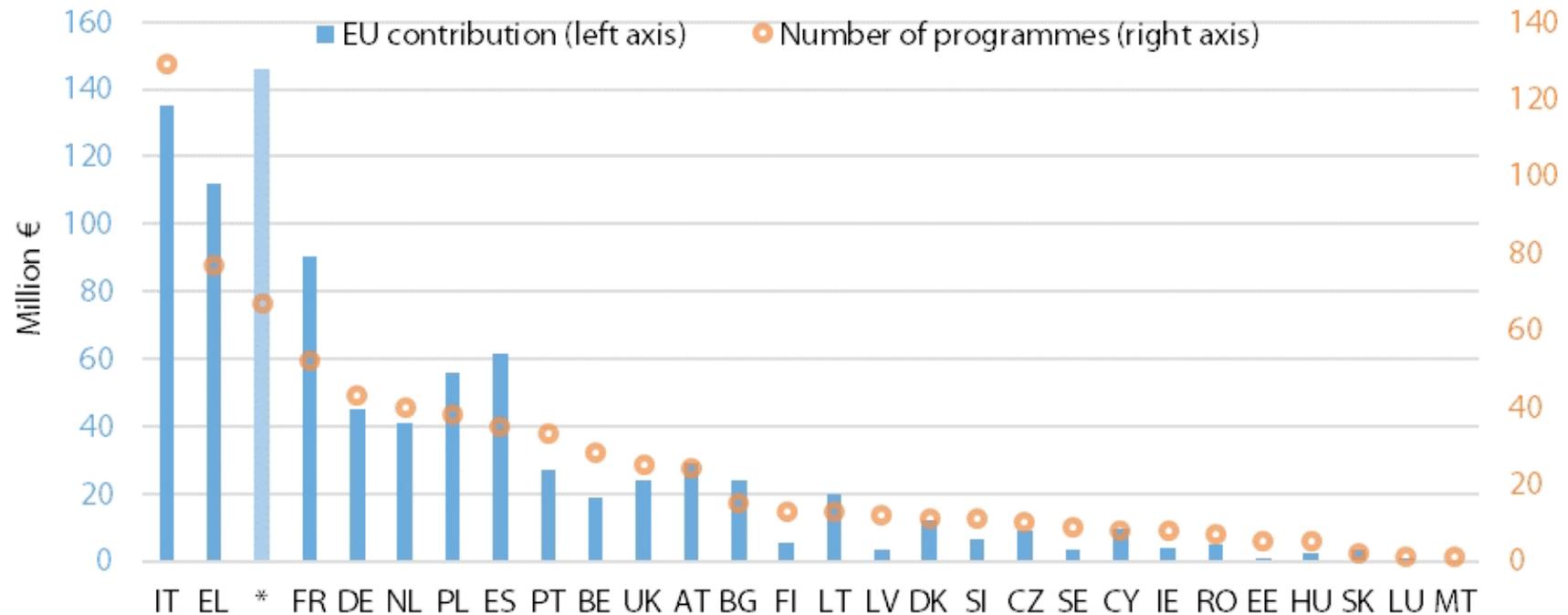
Topic 2 Characteristics of EU agrifood products  
€7 million

## ✓ Multi programmes

- Topic B Characteristics of EU agrifood products  
€37 million
- Topic D Eat 5 a day campaigns (new)  
€8 million

# Award by country

Promotion programmes 2001-2015: Co-financing and number of promotion programmes per Member State



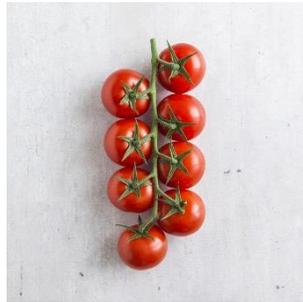
\* multi-Member State

# 2018 proposal - why promote fruit and veg?

- ✓ Promote seasonality and freshness as a reason to buy local produce –secure the market for producers
- ✓ Increase the size of the market

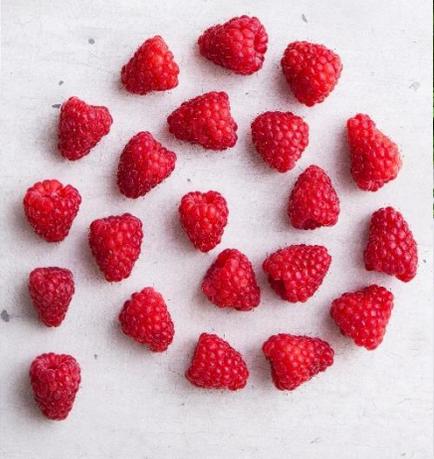
# 2018 proposal

Promote individual crops as they come in to season...



Not just fruit and vegetables in general





**Bord Bia**  
Irish Food Board