

Beef Market Outlook

January 2017

Mark Zieg

Growing the success of Irish food & horticulture

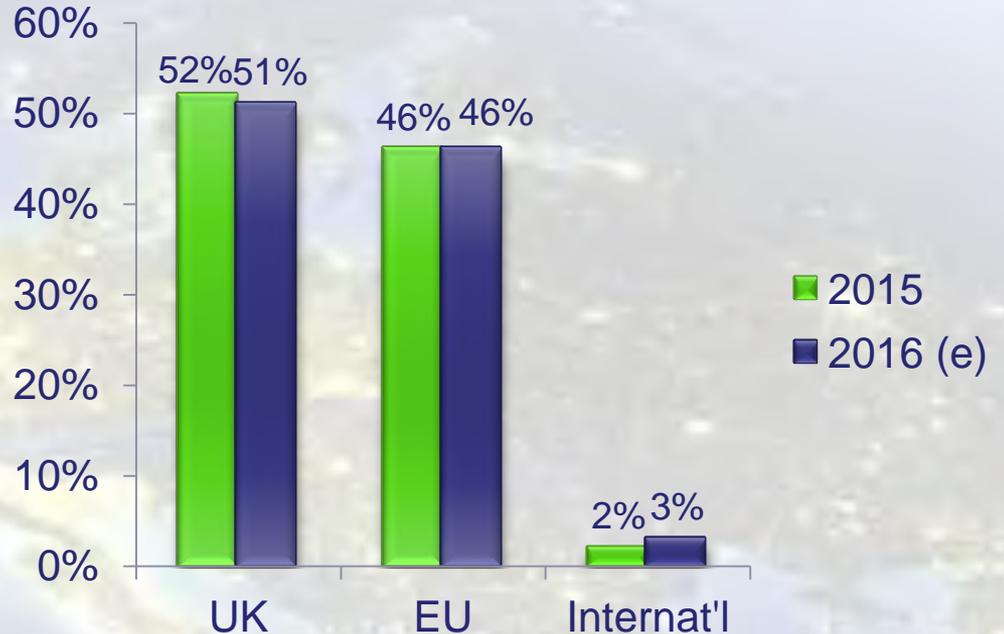
Bord Bia
Irish Food Board

Distribution of Irish Beef Exports (inc. offal)

Irish Beef Exports 2016

535,000T (cwe)
+5%

€2.38bn
-1%

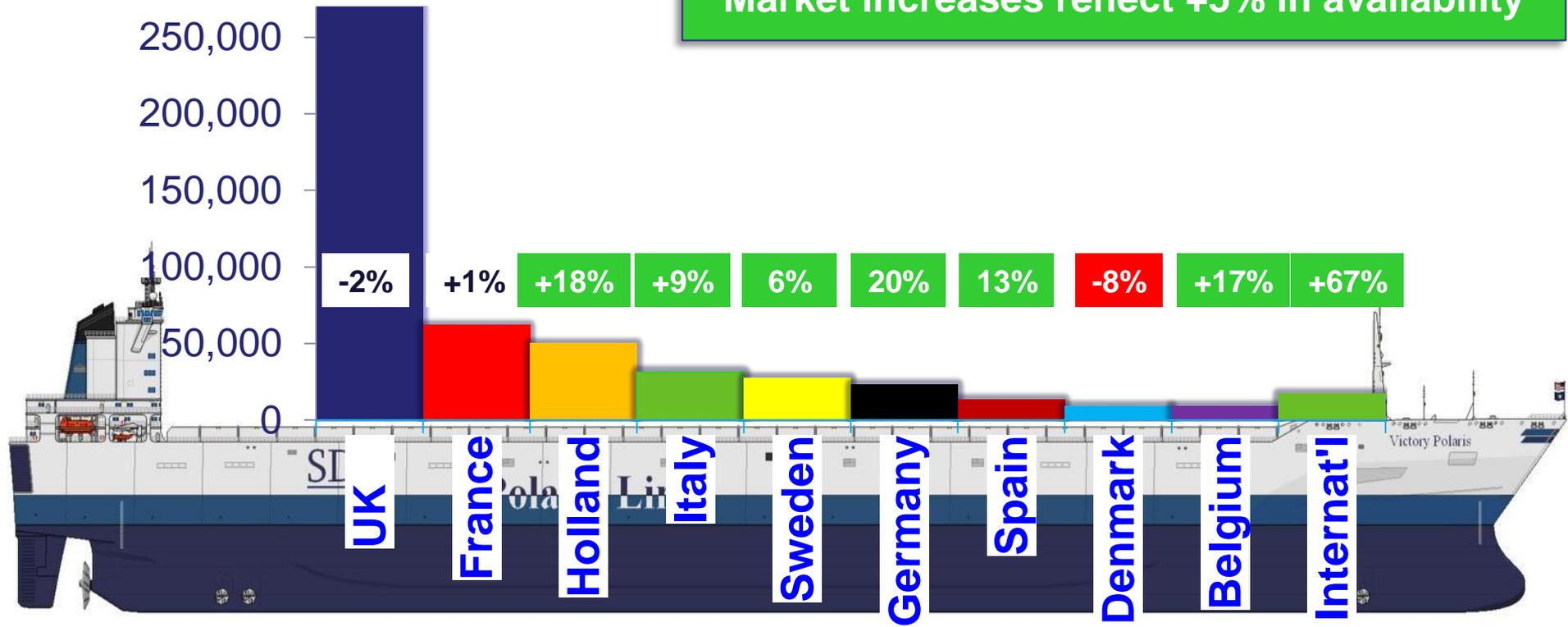


Source: CSO, Bord Bia Estimates

Irish Beef Export Destinations 2016 (tonnes CWE)

Source: CSO, Bord Bia Estimates

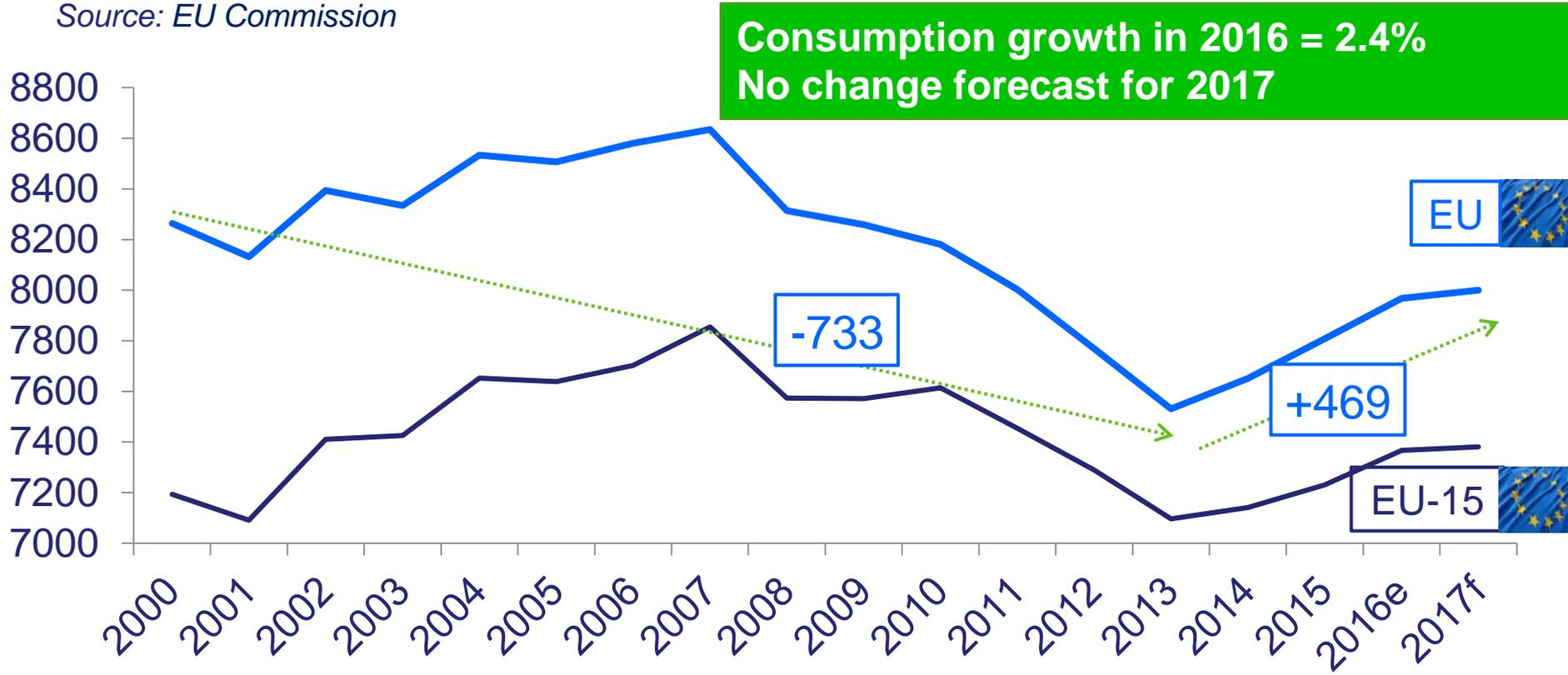
Market increases reflect +5% in availability



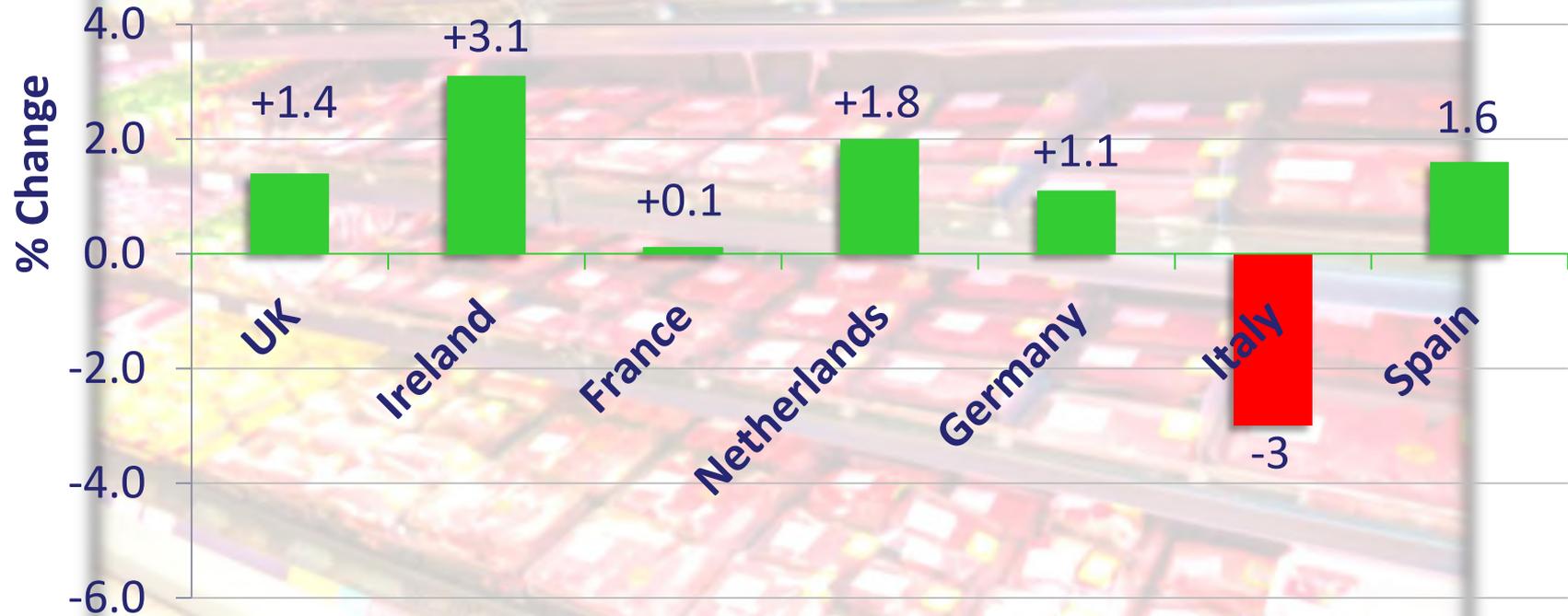
Growing the success of Irish food & horticulture

EU Beef Consumption

Source: EU Commission



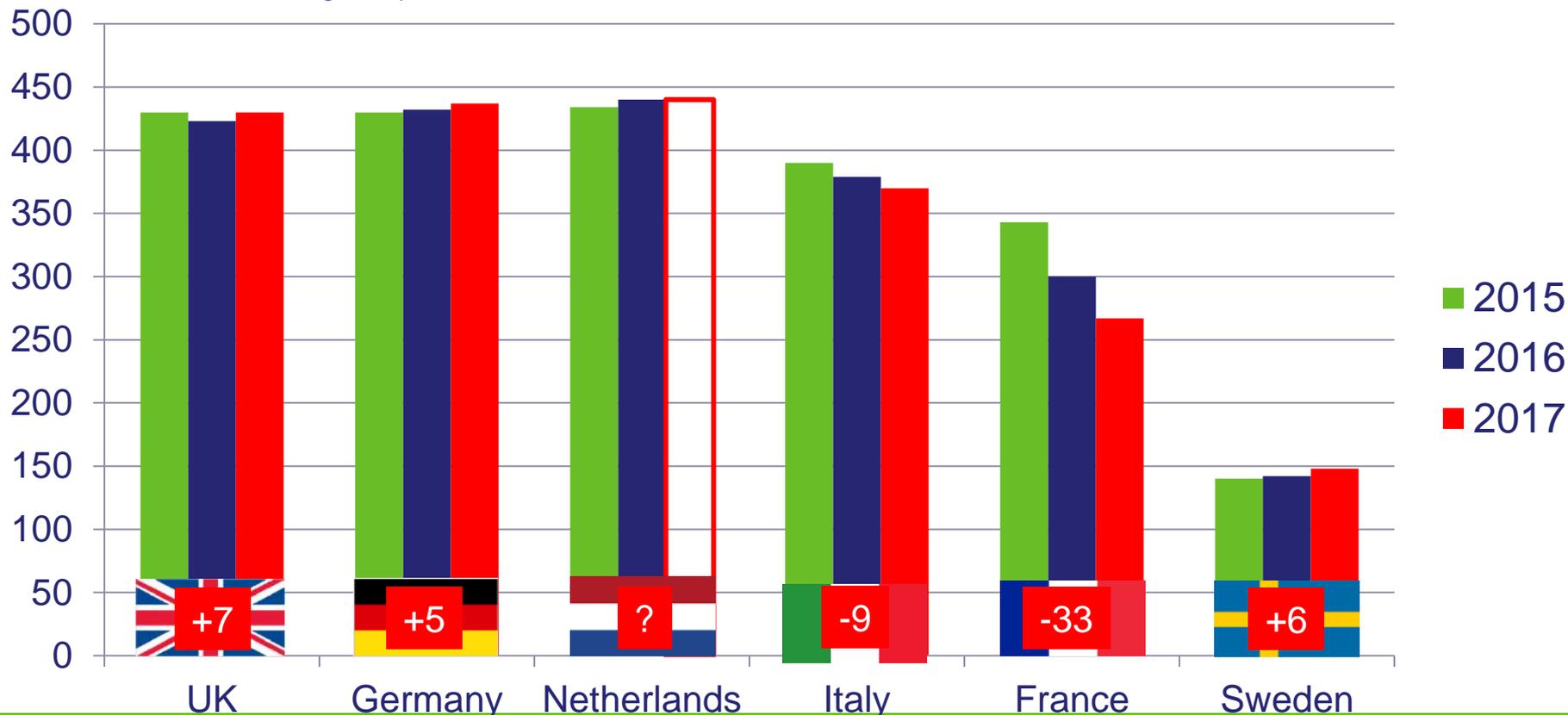
Beef Consumption in European Markets 2016



Source: Kantar Worldpanel, EU Beef Forecasting Group, Bord Bia

Import Development European Markets

Source: EU Beef Forecasting Group

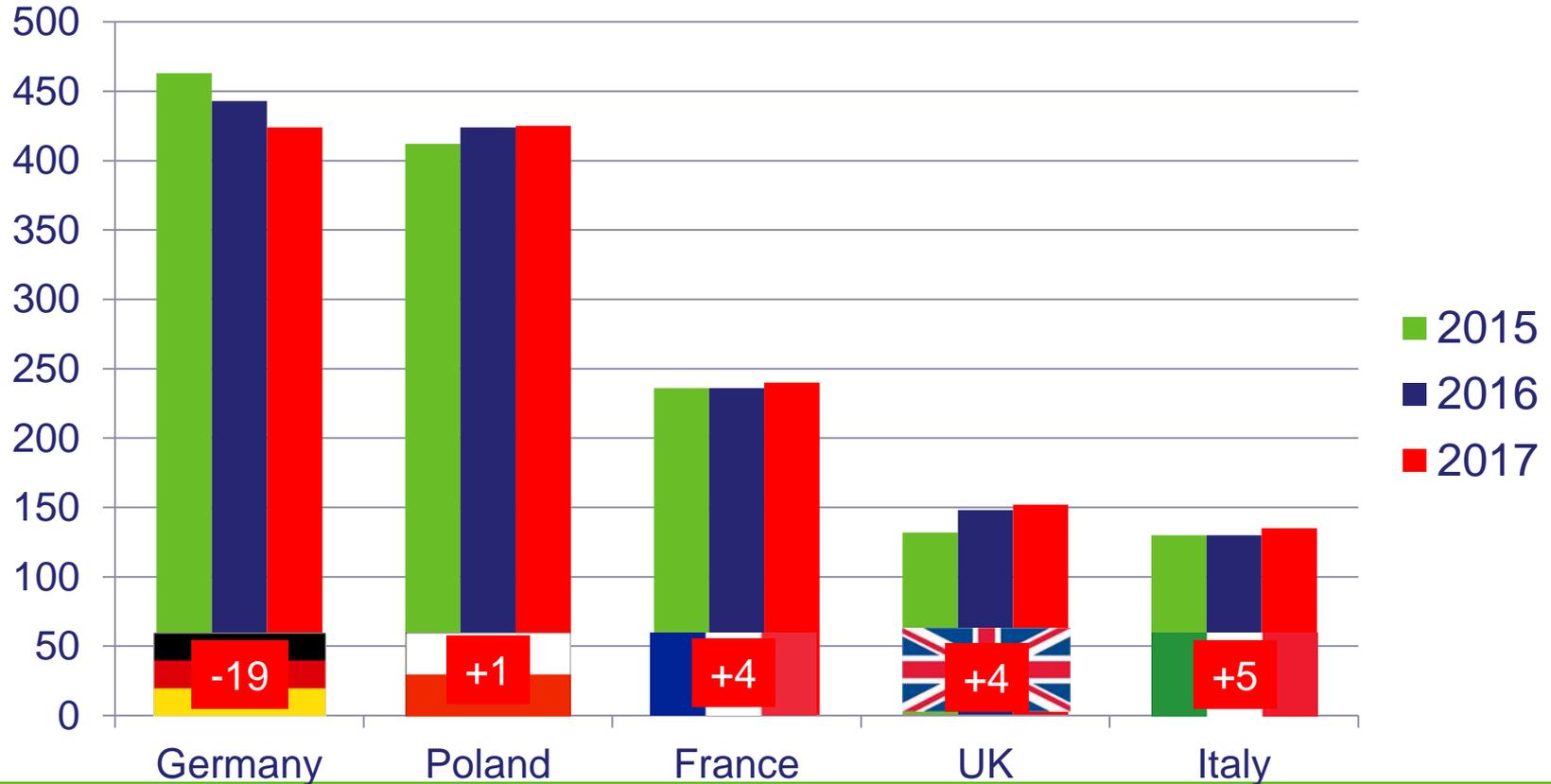


Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Export Development European Markets

Source: EU Beef Forecasting Group

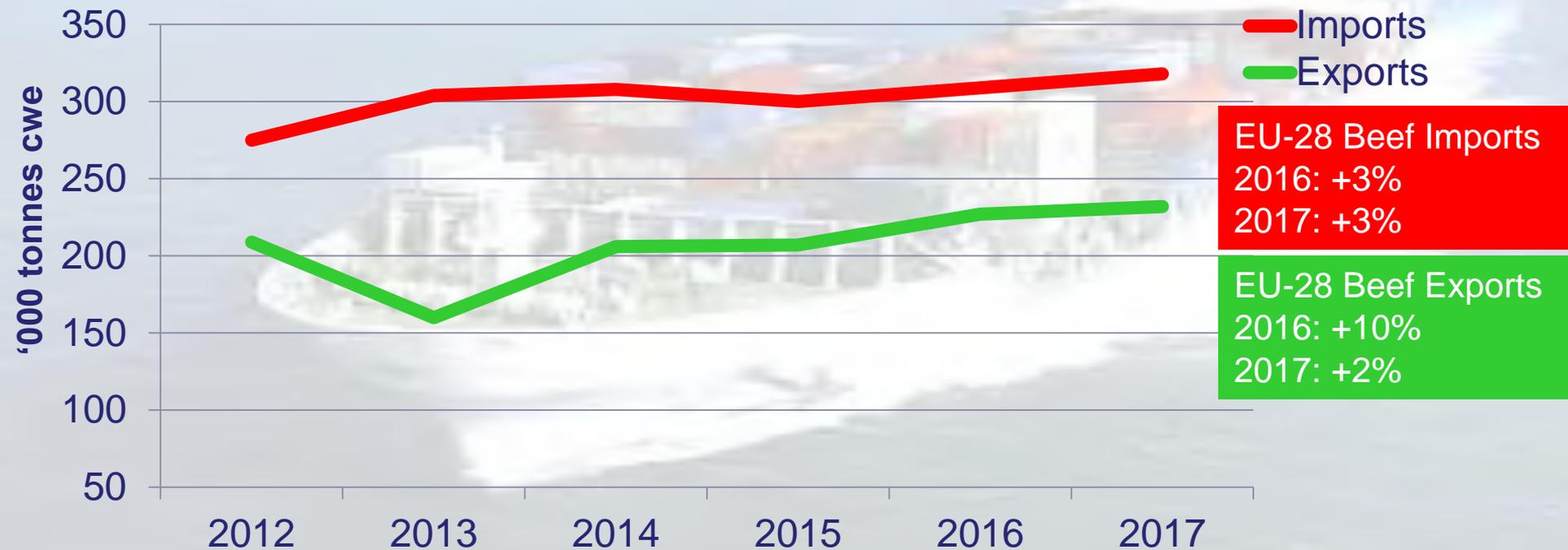


Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

EU Beef Imports/Exports

Source: EU Commission

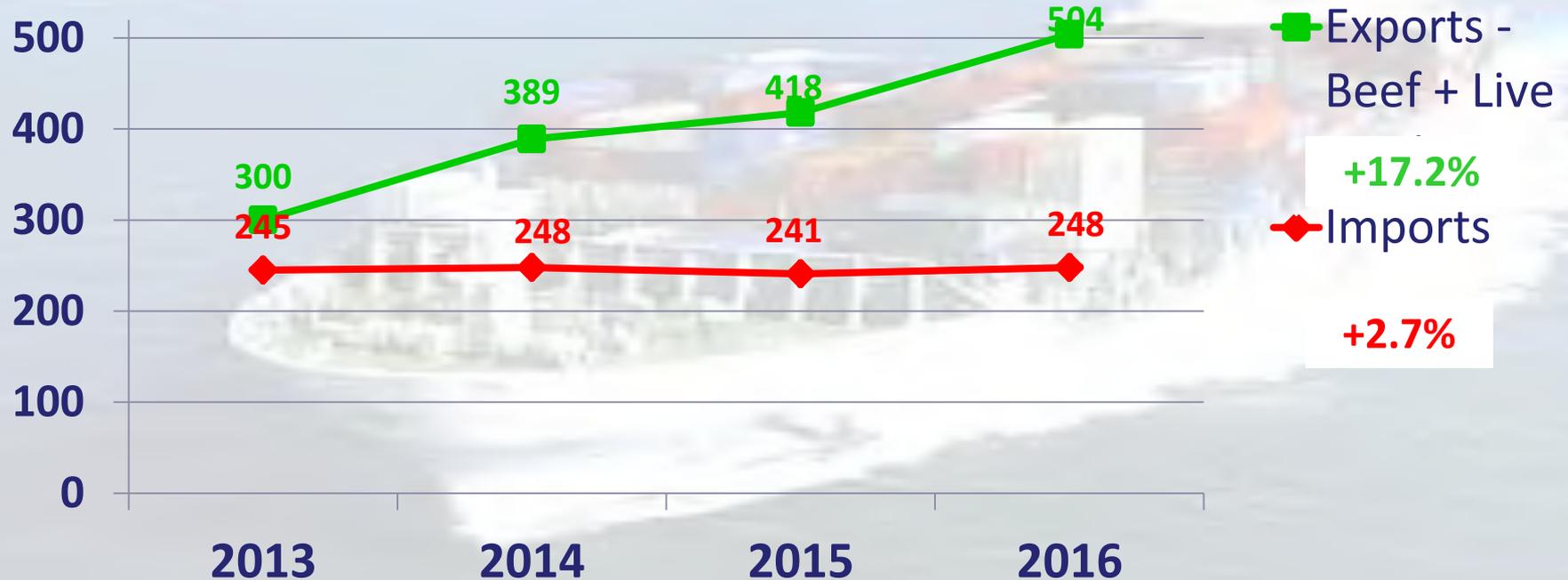


Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

EU Beef Imports/Exports (Jan-Oct)

'000 tonnes cwe

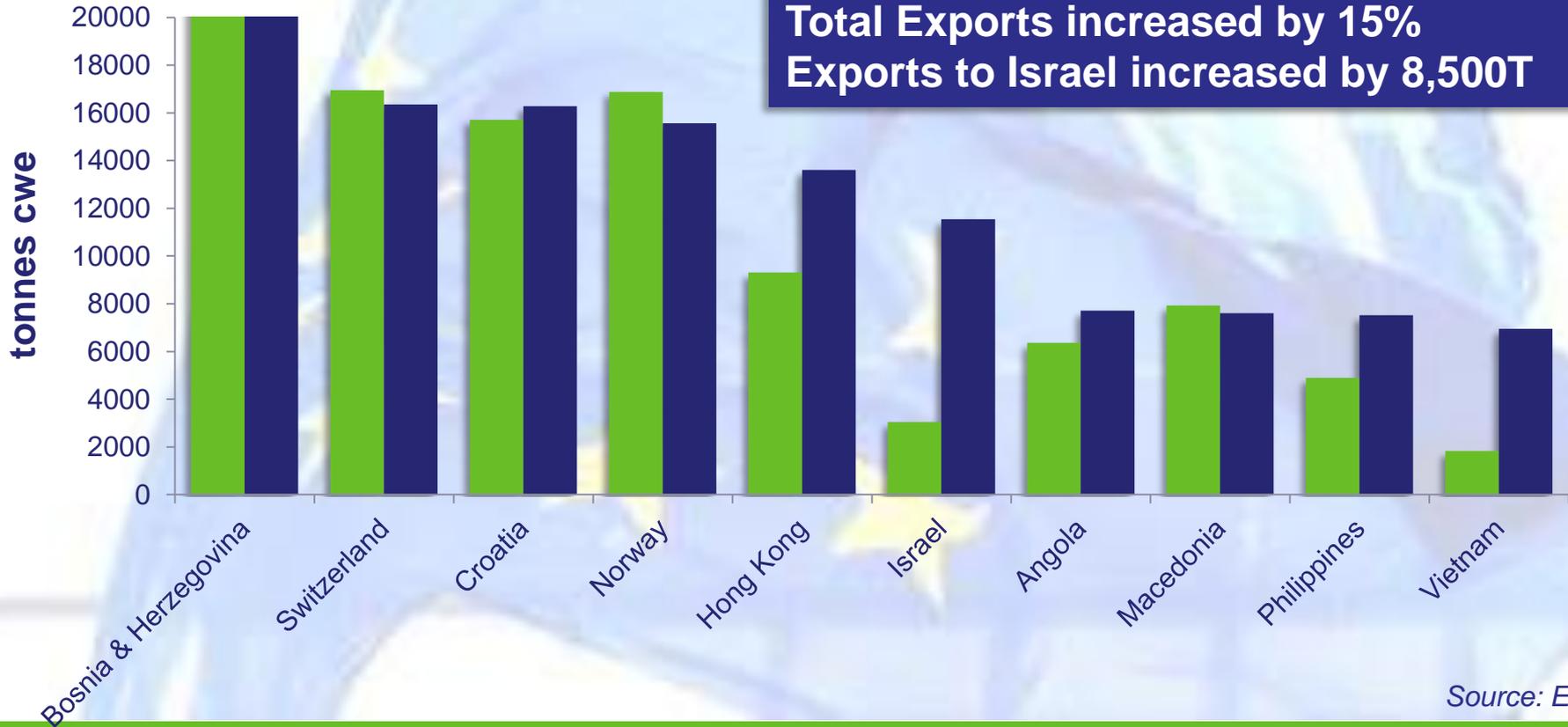


Source: Comext

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

EU Beef Key Export Destinations (Jan – Sept 2016)



Source: Eurostat

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Global Beef Production 2016 vs 2017

Source: Gira, USDA

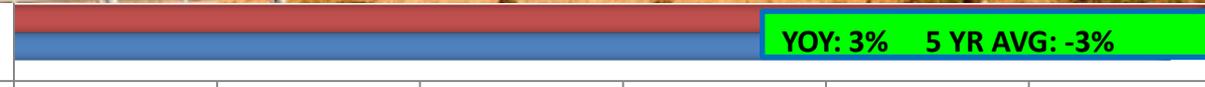


YOY: -3% 5 YR AVG: -13%

1.4% increase in Global Beef Production in 2017

Australian Beef:

- Tightest supplies in 20 years
- Beef exports back 24%
- Live exports constrained by supply, prices and Indonesian demand

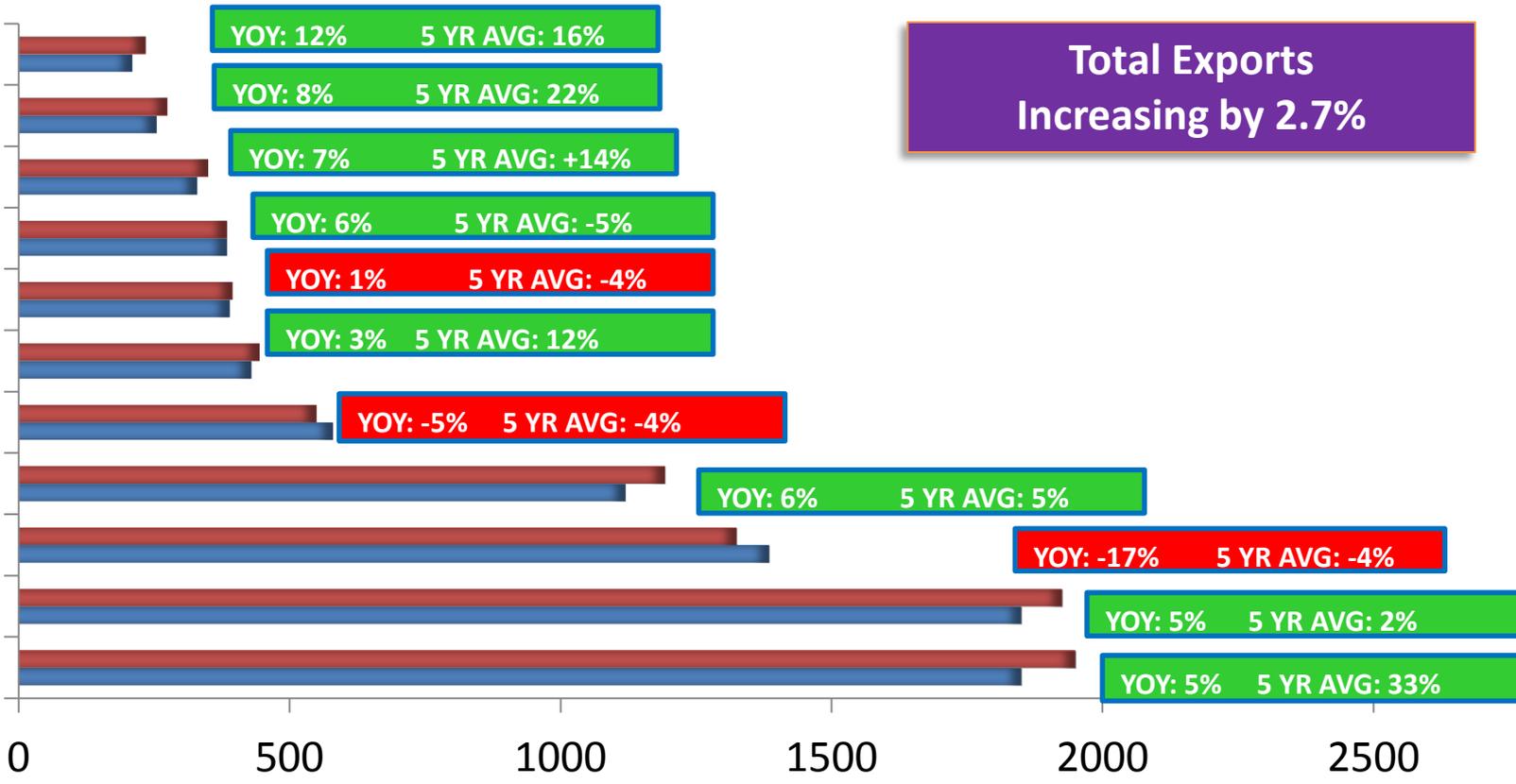


YOY: 3% 5 YR AVG: -3%

'000 tonnes cwe

0 2000 4000 6000 8000 10000 12000 14000

Global Exports 2016 vs 2017

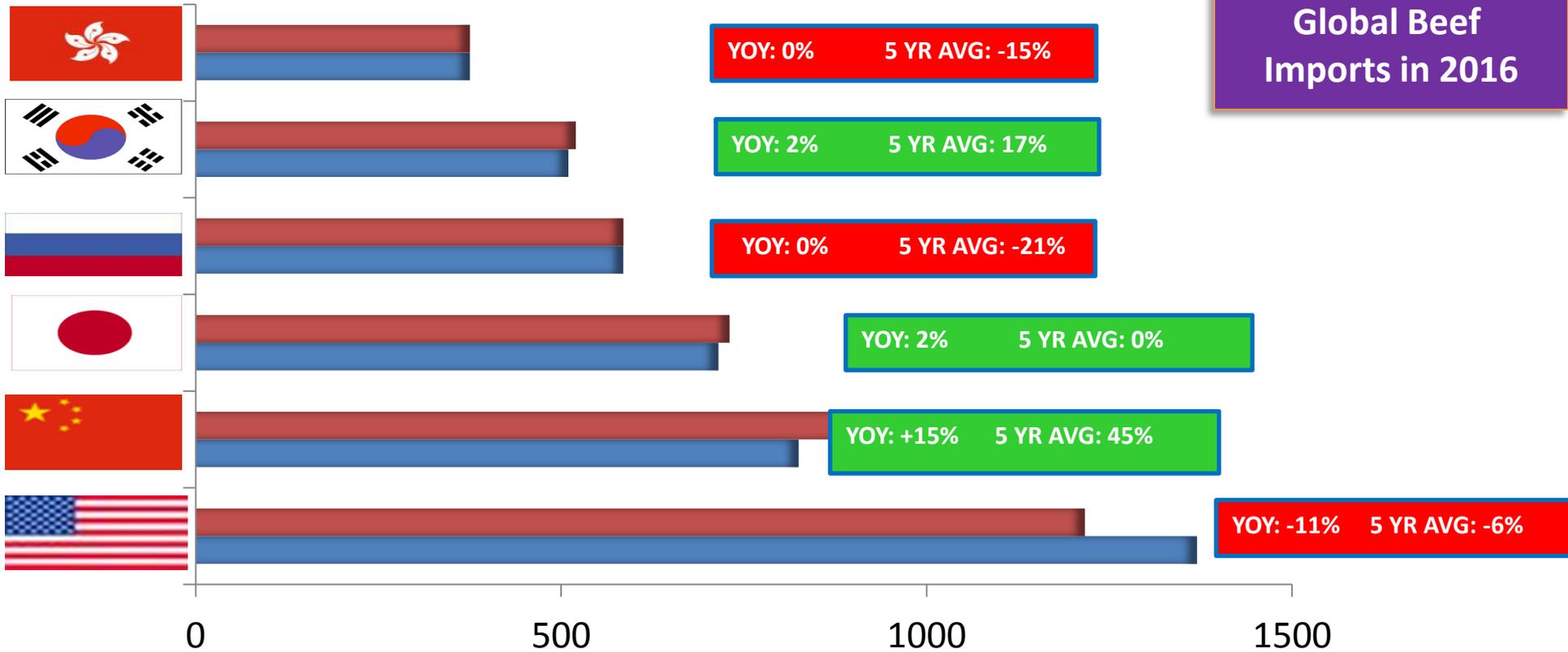


**Total Exports
Increasing by 2.7%**

Source: USDA

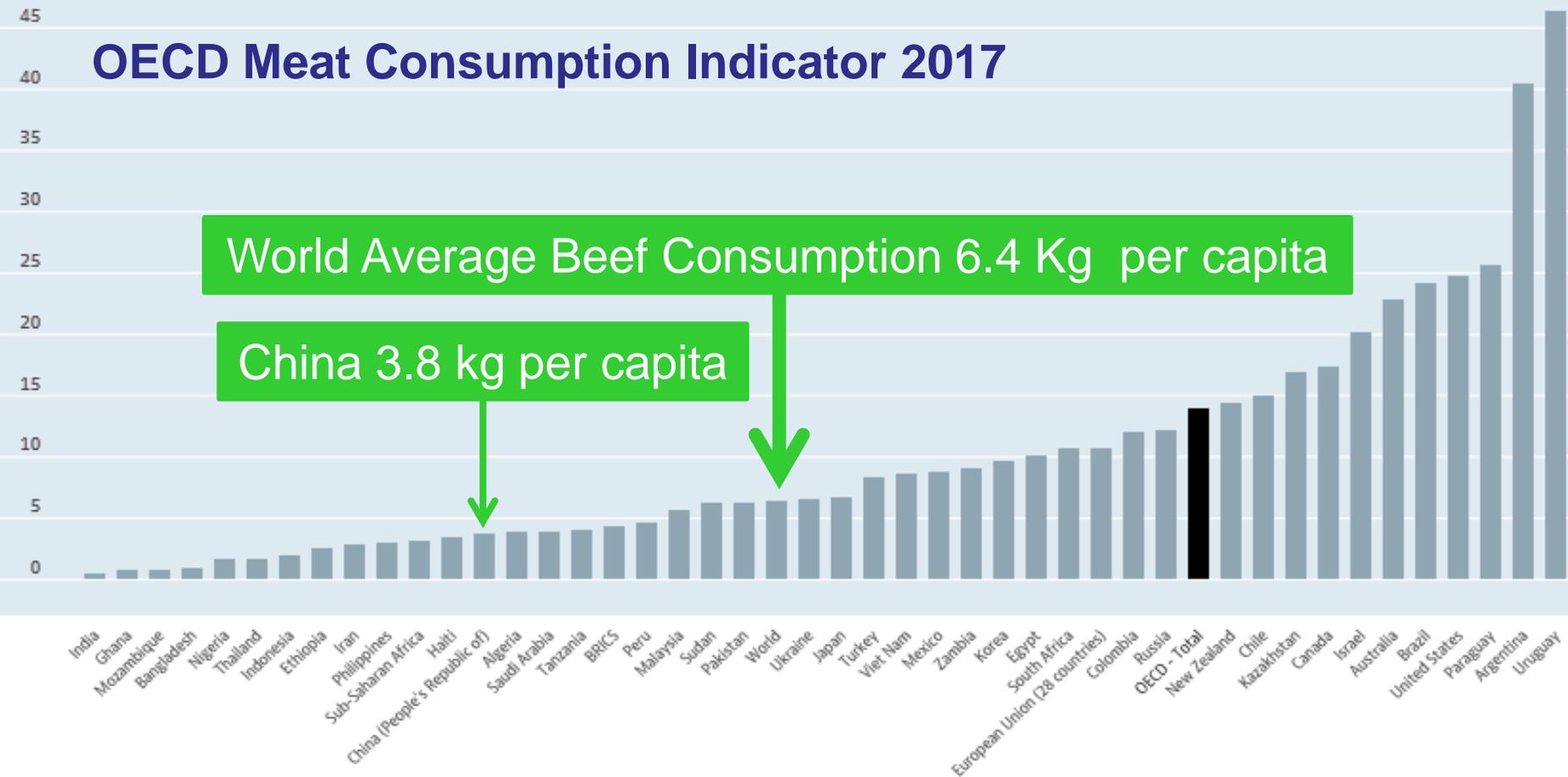
Key Importers 2016 vs 2017

1% increase in Global Beef Imports in 2016



Source: USDA

OECD Meat Consumption Indicator 2017



Beef Markets Summary 2017

- Higher Irish beef exports in 2016
- EU consumption growth holding in 2017
- Increase in EU Exports outpacing Imports
- Global production is expanding
- *Exports => Lower volume from Australia, New Zealand*
=> More from USA, Brazil, India, Canada, Paraguay
- International consumption growth driven by Asia, and Africa

BRITAIN

Maintaining Loyalty and Position ahead of Brexit

Brexit Challenge



Improving consumer engagement

Irish Beef

Since our campaign launched in September 2015 we have improved engagement with our consumers



SOCIAL ENGAGEMENT LEVELS HAVE INCREASED BY **27%**

Our Facebook engagement levels have increased by **24%**

Our Twitter engagement levels have increased by **30%**



WE HAVE INCREASED THE TOTAL NUMBER OF NEWSLETTER RECIPIENTS BY **23%**



CONSUMERS ARE MORE ENGAGED WITH OUR WEBSITE WITH WEBSITE DWELL TIME INCREASING BY **24.20%**



• CHEFS • RECIPES • ABOUT IRISH BEEF • LEARN FROM THE BEST

SEARCH



THE *flavour* SHOWS
WHERE THE BEST *grass* GROWS

Feature Recipe

Rump Cap with roscoff onion



RECIPE - SHAY COOPER

Indulge in Shay Cooper's mouth-watering Irish beef dish - just one of our delicious recipes created in partnership with Great British Chefs.



CHEF - ANDY MCLEISH

Discover Andy McLeish, a chef famed for his intricate modern French cuisine

JOIN US

Sign up to our newsletter

and be the first to hear about our exclusive recipes, chef demos and latest news

Email address

Submit

FOLLOW US

Join our community on Facebook

and share recipe inspiration with like-minded foodies

Like 4 people like this. Be the first of!

TECHNIQUES

Cooking

Roasting
Grilling
Pot Roasting & Braising
Casserolling
Stir Frying



A GUIDE TO TOPPING

Inspiration for the best burger topping

More



BBQ & AS

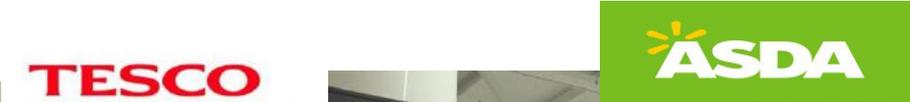
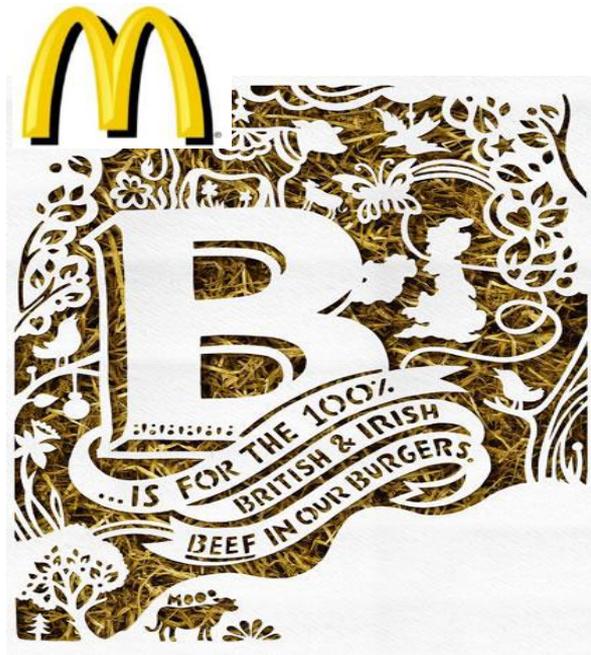
Master this much-loved all-fresh cooking method

More

14 BEEF CUTS &
HOW TO COOK THEM



ss of Irish food



THE BEST OF BRITISH AND IRISH BEEF

Our premium - graded beef is sourced from carefully selected cattle reared on sustainable British and Irish farms.

It's then matured for at least 30 days, hand-prepared by our master butcher and expertly cooked by our chefs – for you to savour however you choose to. Though we're never short of a few *recommendations*.

Promotional Events Supporting Trade



GERMANY

Driving Awareness and building premium positioning



IRISHBEEF.DE
Pulled Pork Sandwich
(mit Cheddar)
Hamburger
Cheeseburger
(Lammfleisch, Salz, Tomate, Gurk)
Pulled Pork Sandwich
(mit Cheddar)
Hamburger
Cheeseburger
(Lammfleisch, Salz, Tomate, Gurk)

IRISHBEEF.DE
ON TOUR
Ein Iren
mitbringen
Zwei
Burger
gratis

IRISHBEEF.DE
BURGER
FRISCHE LUFT
100% HINGABE
230 TAGE
35 REGEN TAGE
158 Gräser
35 Jahre irisch
5.000 JAHRE TRADITION
VON DER GRÜNEN INSEL
ON TOUR
BURGER
FRISCHE LUFT
100% HINGABE
230 TAGE

We have a great story to tell

Farmers are our most trusted ambassadors

Country, Tradition, People = Origin Green

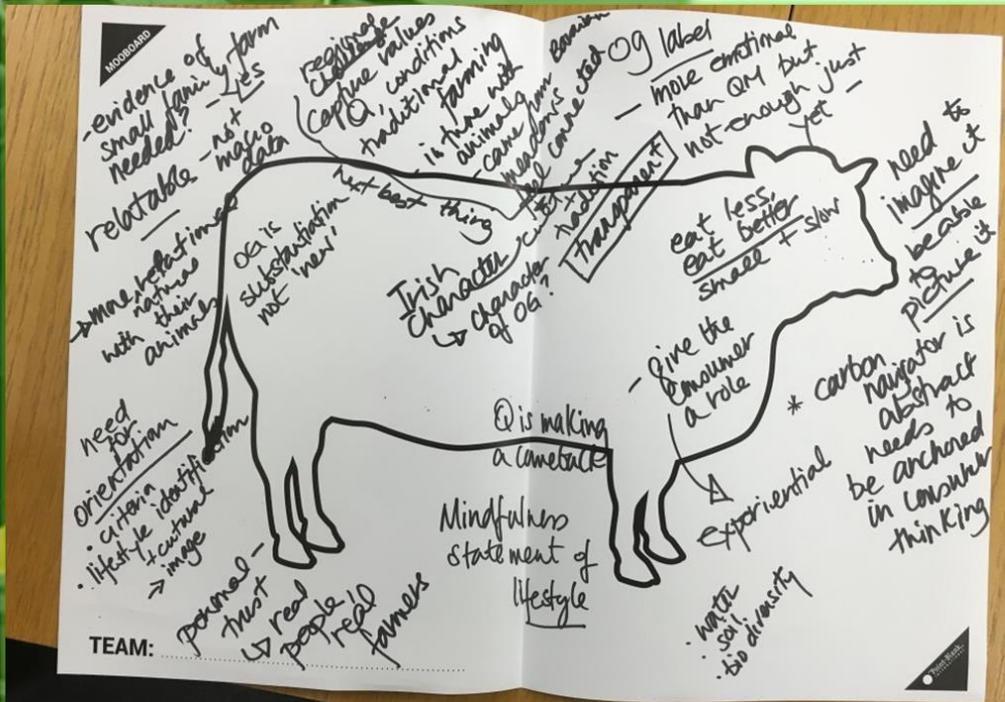
Let's start with grass

People want facts!

Don't tell everything at once

Don't just tell. Show!

THIS IS OUR SEEDING GROUND FOR THE IRISH BEEF COMMUNICATION PLATFORM FOR THE NEXT 3 / 5 / 10 YEARS.



Taste



Headline

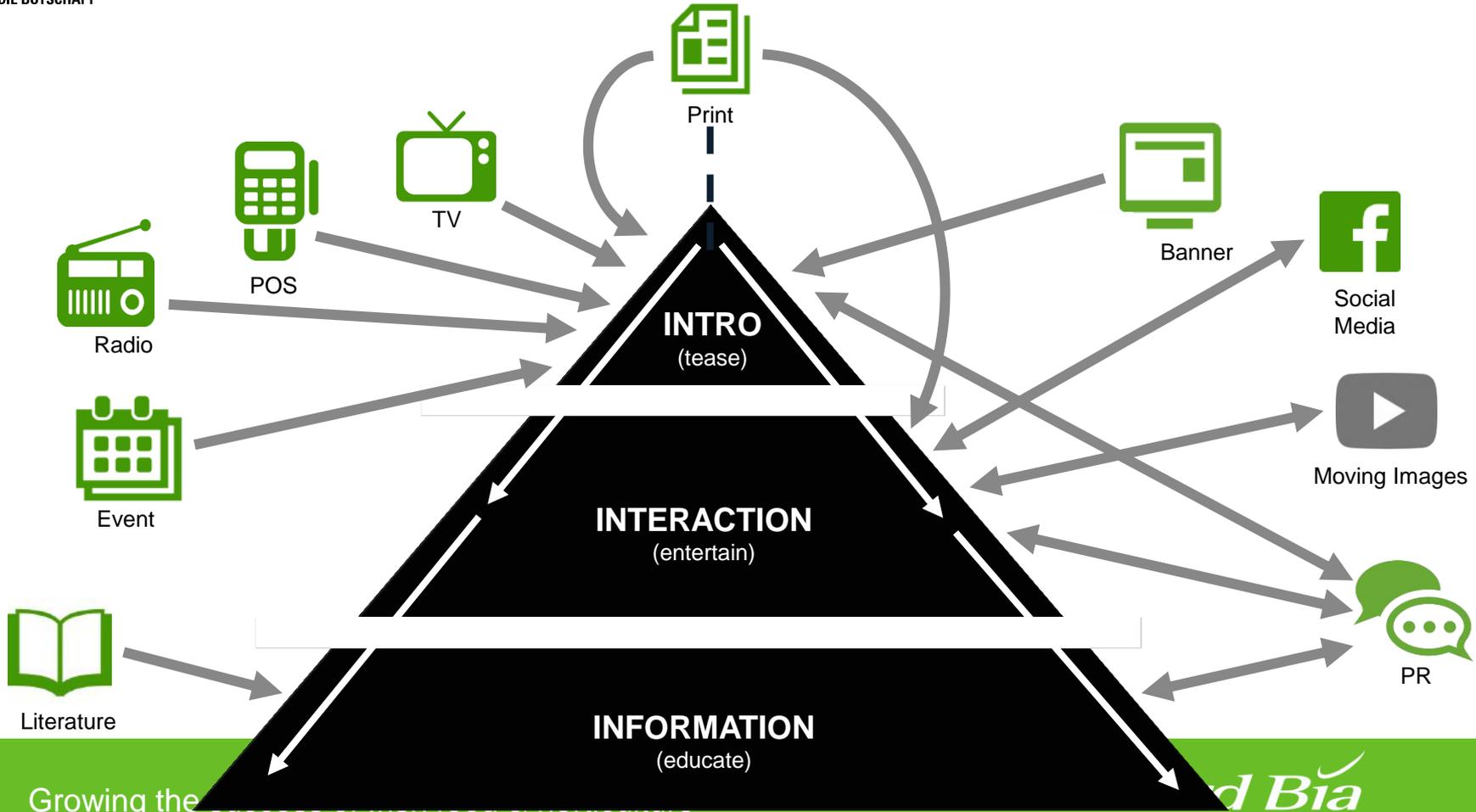
Who would have thought it? This is how juicy sustainability can be.



Headline

We all agree that's Irish at its most beautiful





Netherlands

Maintaining Image based on Quality, Environment and Welfare attributes

The screenshot shows a YouTube interface. The main video player displays a red pot on a stove with meat cubes being added. The text on the video reads "1 kg Iers stoofvlees in blokjes". Below the video, the title is "Iers stoofpotje - Indiase curristoofpot" and the channel is "Irish Beef - KoeTube". The video has 51 views. To the right, there is a list of "Up next" videos, including "Iers stoofpotje - Irish Stew van chef-kok Andrés Delpeut", "Iers stoofpotje - Ierse runderlappen met hutspot", "De boerderij van Dan McKenna | Irish Beef", "Rub it in! Ierse rosbeef met mediterrane BBQ-olierub", and "Rub it in! Ierse entrecote met zomerfrisse BBQ-rub".

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board



Irish Beef, Netherlands

Published by Leon Elders Hooversma '19
Like This Page · 5 August · 6

Lakeview Organic Farm is een traditioneel Ierse boerderij met veel kleine oude muurtjes die de weilanden scheiden. De velden lagen vol met stenen dus het ruimde destijds lekker op!

Lakeview Organic Farm is a traditional Irish farm with lots of little old walls that separate the pastures. The Fields were full of rocks so it cleared up good on time!

📍 [View this location](#)

🏷️ Tag photo / 1/1

👍 Like · 💬 Comment · ➦ Share · 🌟

👤 628 · Top comments

📄 24 shares · 4 comments

 Windy Van De Lindeloof · duide ik frachtig he die galloway runderen! Vrij zijn zelf Irise boeders van een kleine galloway kudde. Dat plekje uit Ierland is veel lekker erend.

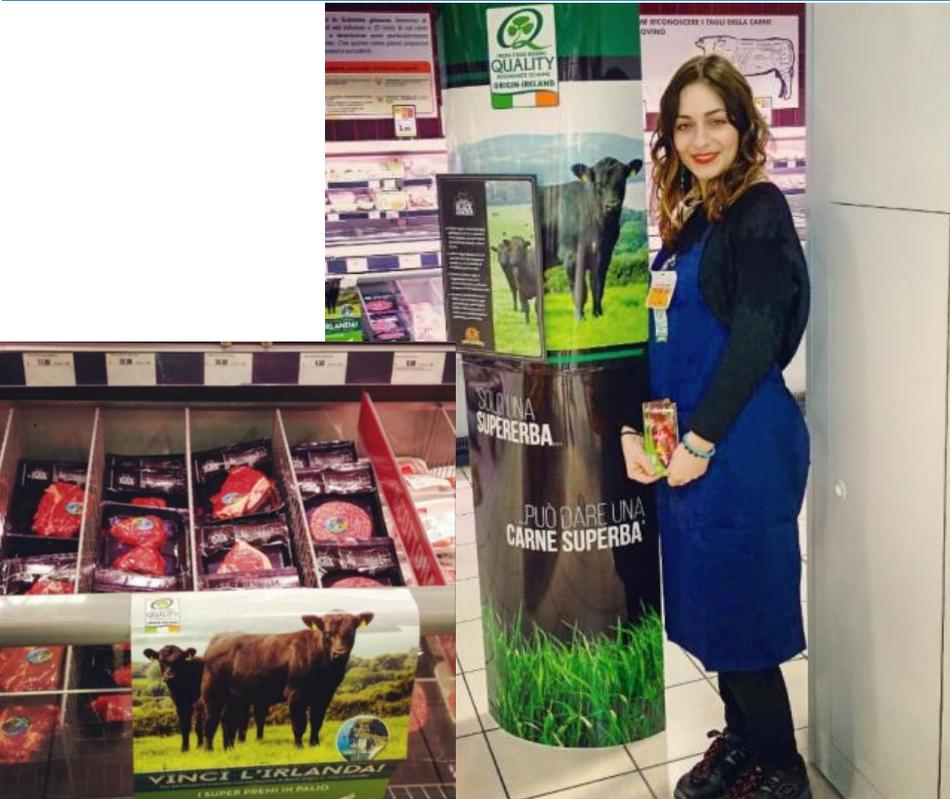
 Write a comment... · 🗨️

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Italy

Supporting Communications of Premium Beef at Retail and Foodservice



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

UNA STORIA DI LIBERTÀ



Scopri un piacere selvaggio su IRISHBEEF.it



Nordics

Supporting high end market opportunities at retail and foodservice



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

ASIA

Extending Market Reach

Bord Bia
Irish Food Board
爱尔兰食品局



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

EU Beef and Lamb Promotion - Asia

EU Promotion – Intern/Journalist/buyer visits
EU Promotion – Symposiums & Seminars



**EUROPEAN
Beef & Lamb**
Excellence in Food Safety & Sustainability



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Chefs Irish Beef Club

Strengthen the CIBC presence in the Nordic markets and establishing presence in Dubai



Targeting 95 Chefs in 2017

Beef Outlook 2017 - Mark Zieg

Thank You

