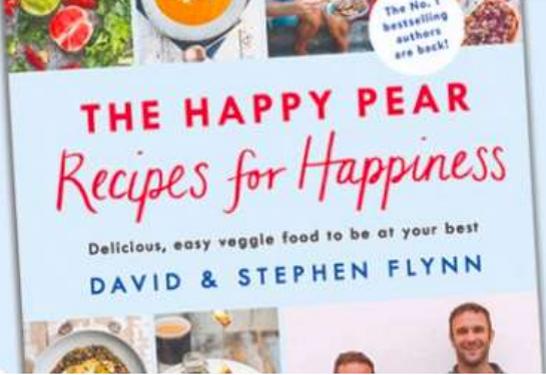




NEWS

The new
immersive
Topshop
virtual reality
campaign

May 2017



**OUR NEW BOOK
RECIPES FOR HAPPINESS
IS OUT! ORDER NOW!**

ROSANNA DAVISON

Eat Yourself Fit



MAKE YOUR WORKOUT WORK HARDER



Tweets **52.6K** Following 7,146 Followers 205K Likes 9,542

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Lovin Dublin



Irish Foodservice Market Insights

NOVEMBER 2018



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

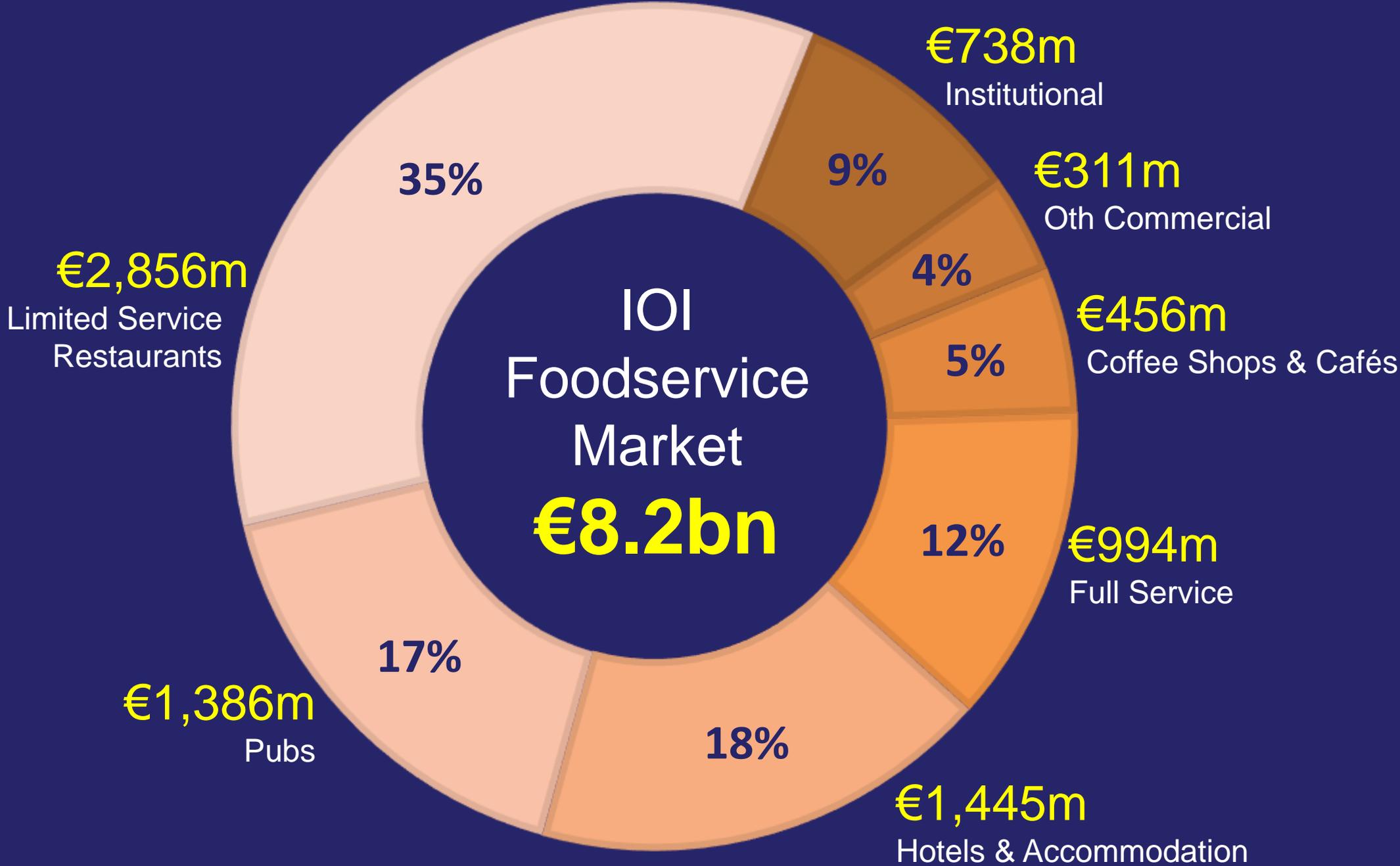
www.bordbia.ie

Critical Strategic Issue

#1

**Boom times drive growth,
but create major challenges**

Irish Foodservice Market Snapshot





< September



27 Sep 2018



6

Tourism Ire
of +7.8% in
January-Au

We are determined to ensure that tourism growth continues. Our aim is to grow overseas tourism revenue in 2018 to €6bn, for the island of Ireland.

Niall Gibbons, CEO Tourism Ireland



**Ireland's healthy tourism has
been a boon to Economic Growth**

[NEWS](#) [SPORT](#) [BUSINESS](#) [OPINION](#) [LIFE & STYLE](#) [CULTURE](#) [MORE](#)

[The Economy](#) > [Budget 2019](#) | [Small Business](#)

[All Business](#) ▼

Donohoe confirms 'disastrous' VAT rise to 13.5% for tourism

Budget 2019: Minister says measure will raise €466m for spending and is 'responsible'

🕒 Tue, Oct 9, 2018, 14:11

Updated: Tue, Oct 9, 2018, 14:12

[Mark Paul](#), [Fiach Kelly](#)



jobs find y

Technology Careers

536

Technology Careers

536

Technology Careers

536

505

Ed

ers

careers

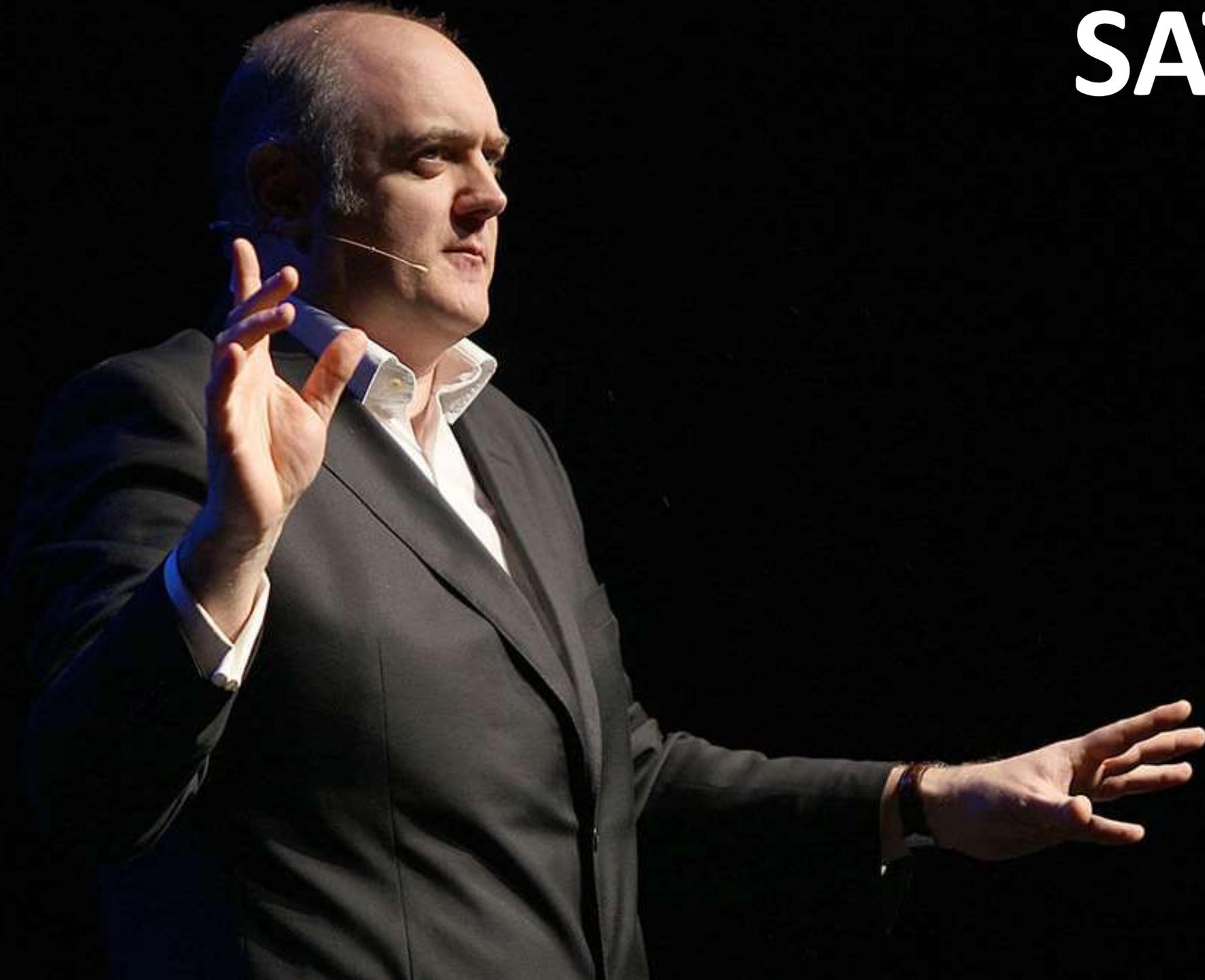
THE WAR FOR TALENT



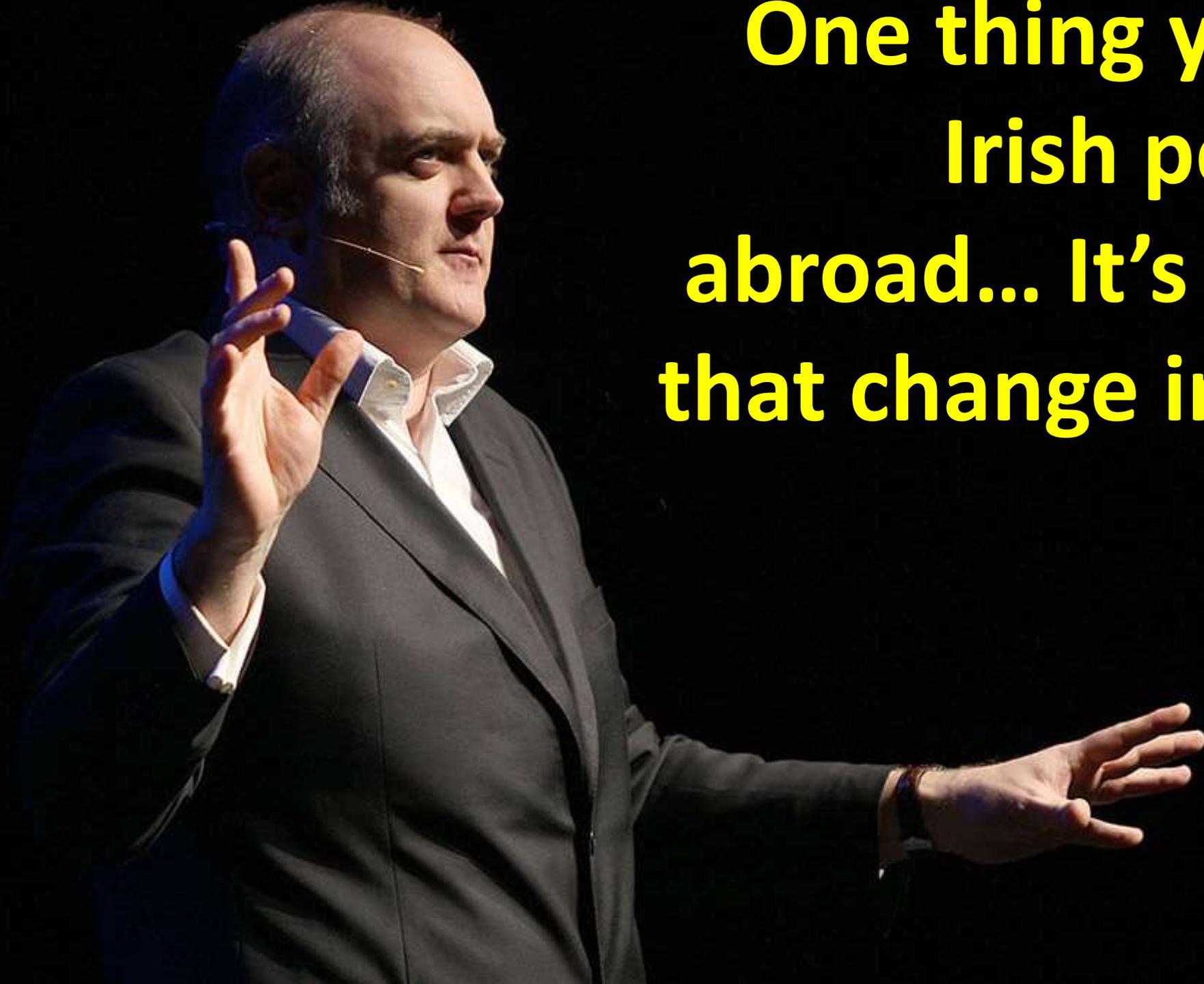
Ed Michaels • Helen Handfield-Jones • Beth Axelrod

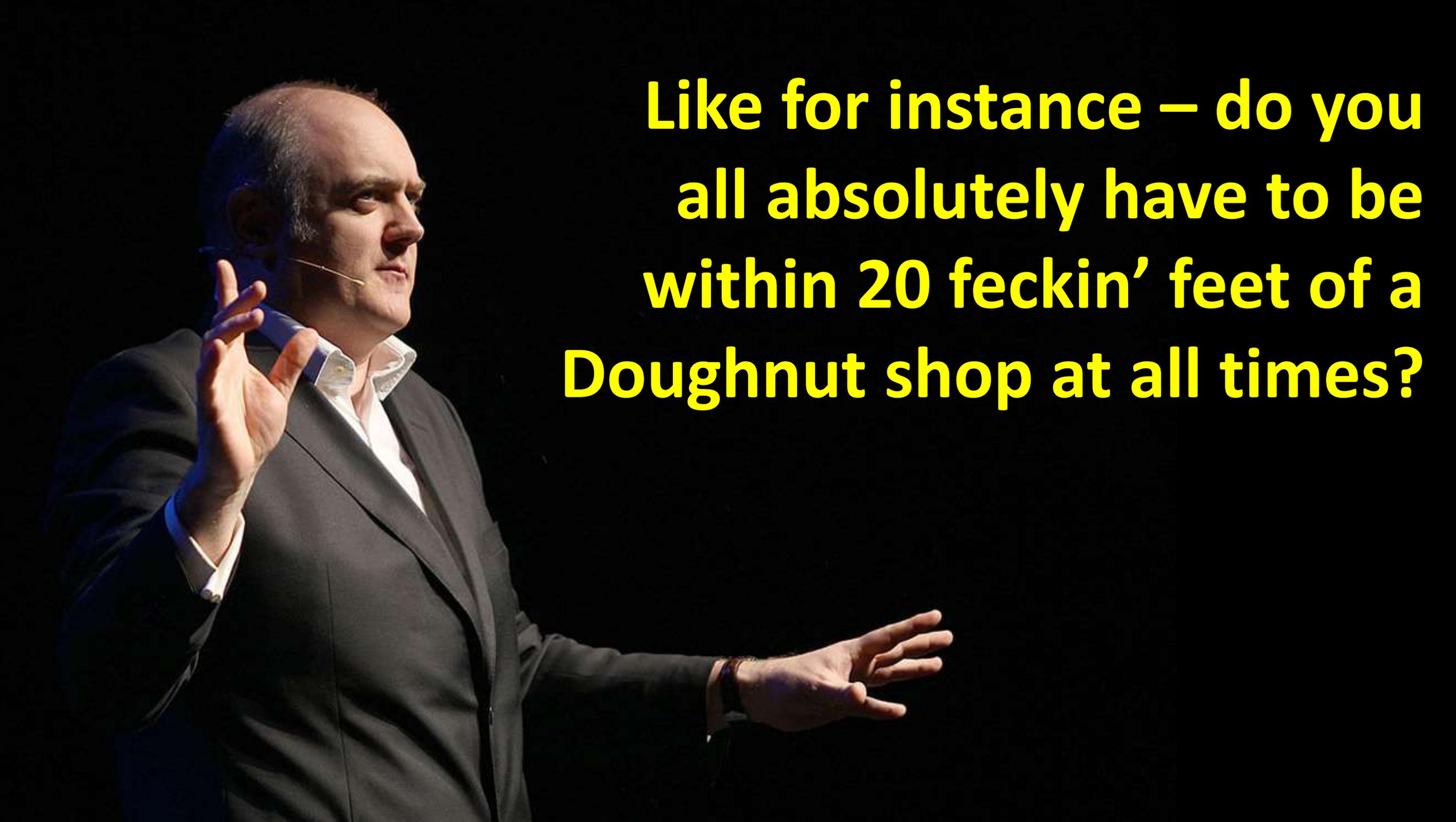
HARVARD BUSINESS SCHOOL PRESS

SATURATION?



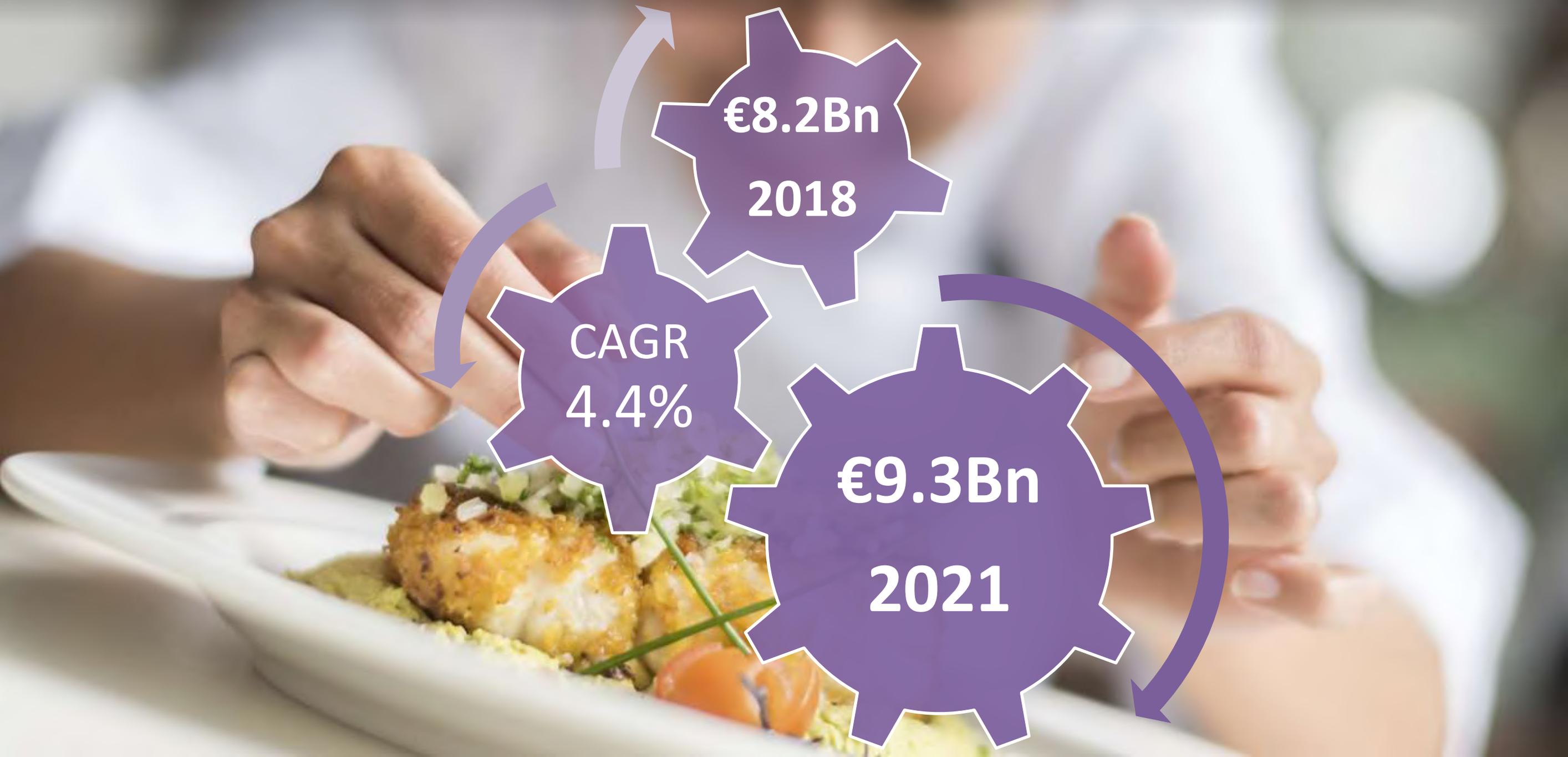
**One thing you notice as an
Irish person who lives
abroad... It's the little things
that change in between your
visits home.**



A man with a receding hairline, wearing a dark suit jacket over a white collared shirt, is speaking on a stage. He is gesturing with his hands, with his right hand raised and fingers spread, and his left hand held lower and also open. He has a small microphone clipped to his shirt. The background is dark.

**Like for instance – do you
all absolutely have to be
within 20 feckin’ feet of a
Doughnut shop at all times?**

3 Year Growth Outlook 2019-2021



Critical Strategic Issue

#2

**Foreign investment is changing the nature
of competition in Irish Foodservice**

International Chains move into Ireland's Booming Market

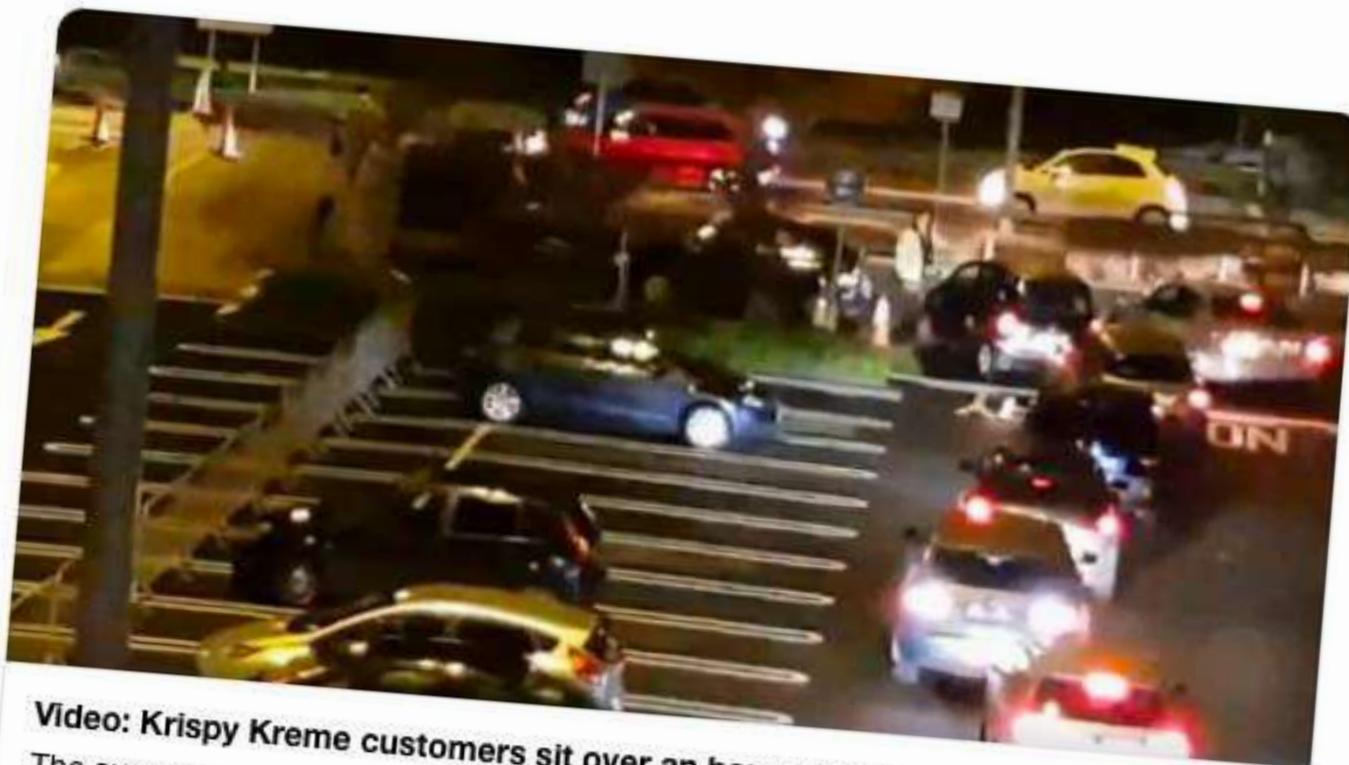




D DublinLive 
@DublinLive

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Hilarious video shows Krispy Kreme customers sitting in their cars for over an hour without realising they're not in the queue

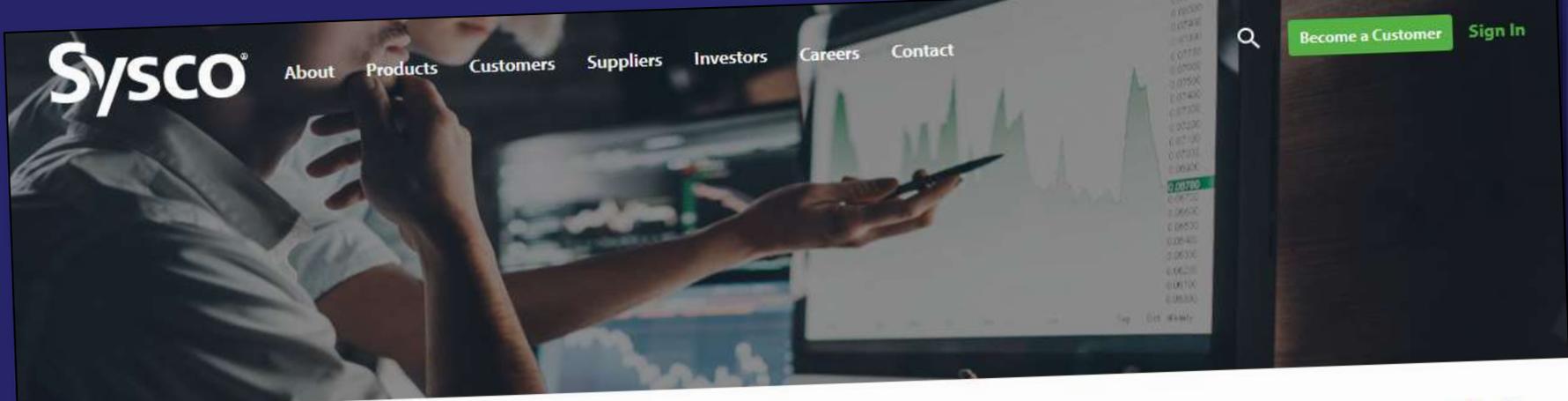


Video: Krispy Kreme customers sit over an hour unaware they're not in the line
The sugary treats being sold at the Blanchardstown Centre has brought on a new level of traffic chaos, and some noisy honk-happy customers have been causing...

dublinlive.ie

7:07 AM - 3 Oct 2018

Distributor Consolidation

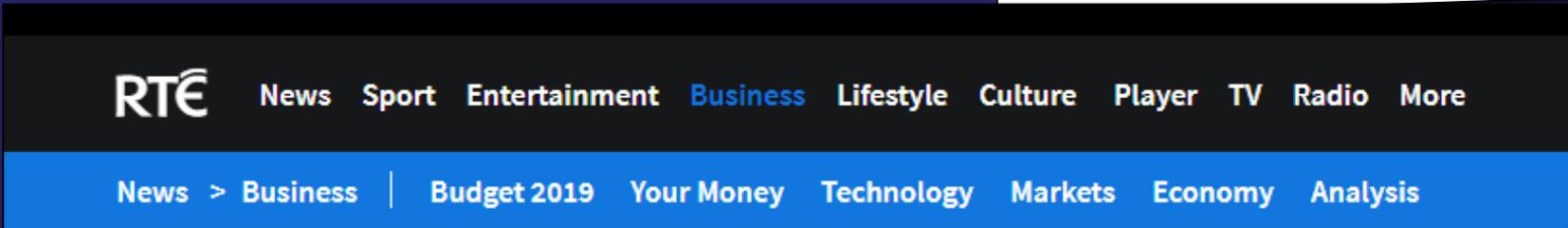


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Sysco Agrees to Acquire Brakes Group

Feb 22, 2016



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News > Business | Budget 2019 Your Money Technology Markets Economy Analysis

Musgrave buys La Rousse Foods from Aрызta

Updated / Tuesday, 5 Dec 2017 12:17

[f](#) [t](#) [in](#) [✉](#) [🖨](#)



Hi 12°C | Lo 7°C Belfast | WEATHER

Belfast Telegraph DIGITAL

HOME NEWS SPORT BUSINESS ENTERTAINMENT LIFE CARS OPINION TRAVEL

Northern Ireland | Food, Drink and Hospitality | UK & World | Brexit | Tech | Jobs | Agri | Analysis

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Henderson acquires Monaghan-based food supply business

By Emma Deighan
July 3 2018

[f](#) [t](#) [G+](#) [✉](#)

The food service arm of Spar owner Henderson Group has acquired a firm in Co Monaghan, giving it a further foothold in the Republic.

Critical Strategic Issue

#3

**Channels blur as food becomes
point of differentiation**

Non-traditional segments increasingly use food to compete



Non-traditional segments increasingly use food to compete



New Channels Emerge

BWG plans €25m Spar expansion and pivot towards digital

Retailing group to open 45 new stores and will go deeper into the restaurant market with in-store dining

🕒 Tue, Oct 9, 2018, 05:44

Mark Paul



Leo Crawford, group chief executive of BWG Group, outside the relaunched SPAR Millennium Walkway store in Dublin city centre.

Critical Strategic Issue

#4

Today's Irish consumer has new demands

Convenience is the key Driver



70
70
70
70
20
40
40
00
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70
00
IC
R ORGANIC MILK

always

QUENCH

Rehydrate the right way

LUNCH.PACKED.

Look out for our healthy options

LIGHT.BITE.

Pick up a healthy snack

Dayparts blur and traditional ways of dining are disappearing



Consumers are looking for more experience when eating out



QUENCH €5

- MANDARIN, GINGER & BASIL ICED TEA
- BERRY CRUSH SMOOTHIE
- PICK ME UP SMOOTHIE

SHAKEN & STIRRED

- THE MARKER MARY
A Classic Bloody Mary with our secret Marker Mary Mix,
stirred at your table by our in house Mixologist
- MOJITO
Visit our Bar and Build your own
- Spirit - Hand

THE MARKER RAW JUICE

- GINGER ALE, LIME & MINT SPRITZER
- VALRHONA CHOCOLATE MILKSHAKE

- START PL
- SALT & PEPP
Pickled Cucu
- CHIPOTLE S
Crozier Blue
Pomegranat

EGGS



Critical Strategic Issue

#5

**The pros and woes of Ireland's growing
on-demand Foodservice culture**

Your favourite restaurants, delivered fast to your door.

Enter your postcode

e.g. EC4R 3TE



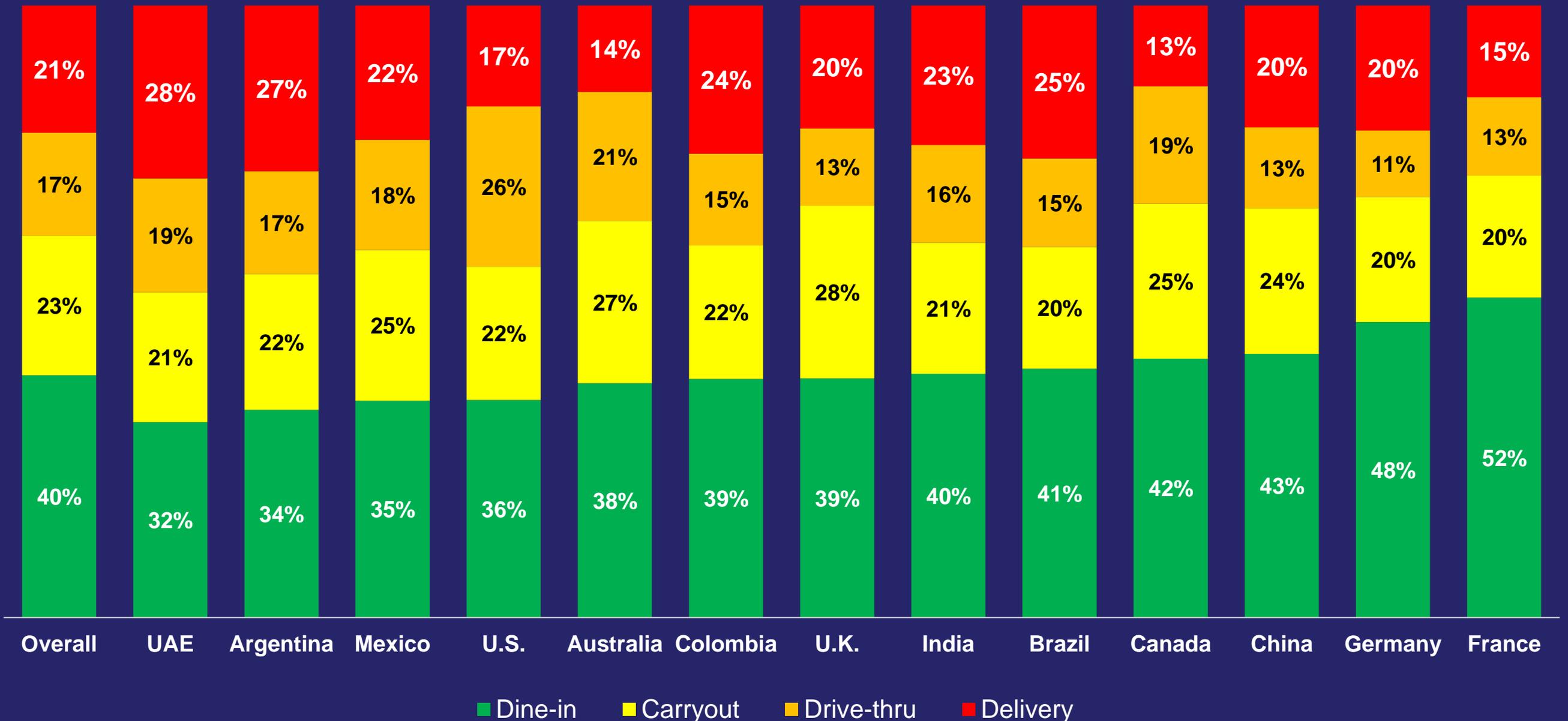
Delivery is a global disruptive trend





Order Format

(% of Orders For...)



Critical Strategic Issue

#6

**Adopting the Millennial stat of mind:
tech forward, automated**

Globally, tech trends dominate

ONLINE ORDERING

42% say it adds value to their restaurant experience, up by 5% since 2017

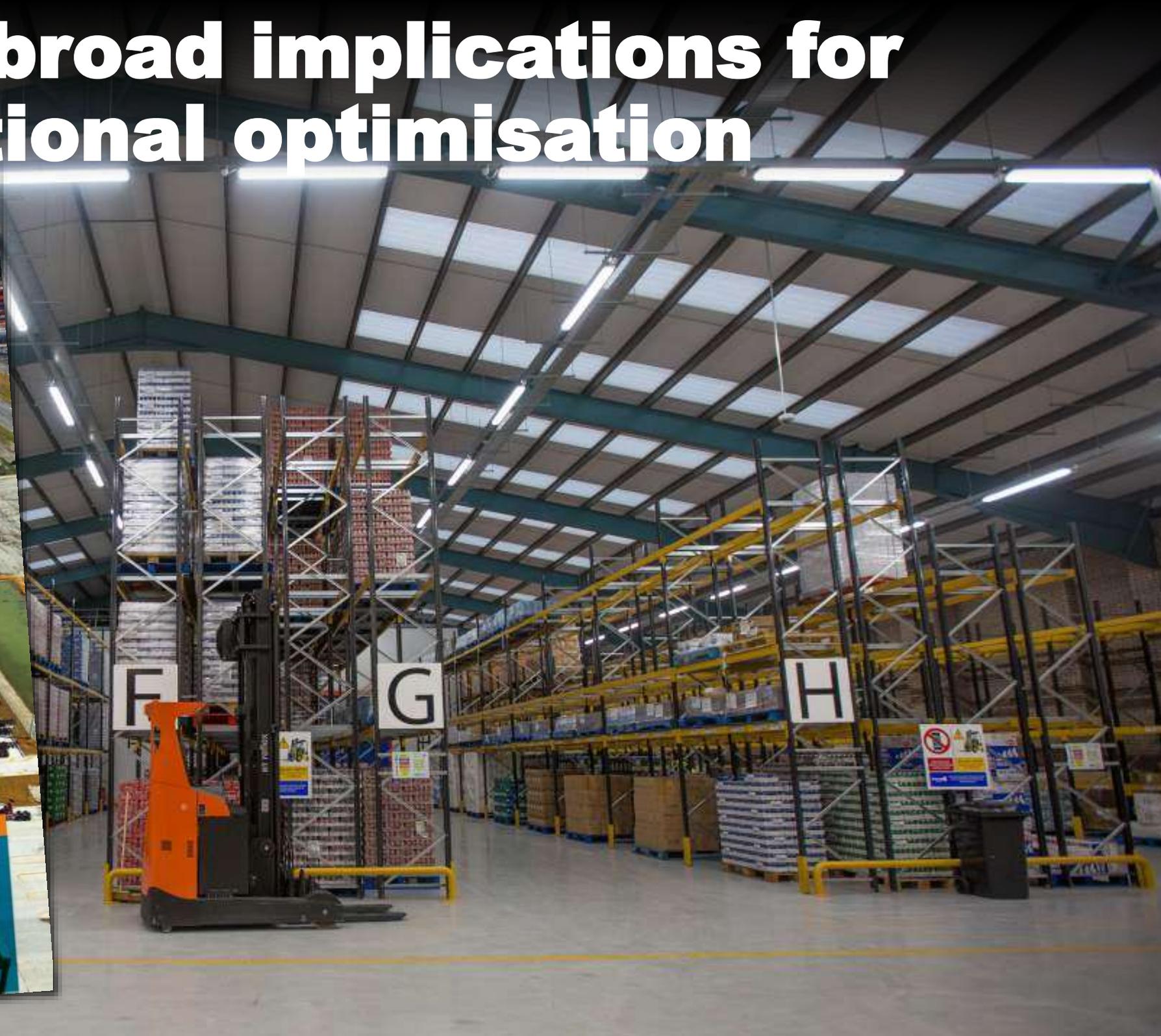
ORDER/PAY VIA APP

39% say it adds value to their restaurant experience, up by 3% since 2017

ONLINE PAYMENT

39% say it adds value to their restaurant experience, up by 4% since 2017

Tech has broad implications for operational optimisation



**Tech has broad implications for
operational optimisation**



— THE IMPORTANCE OF —
Blockchain in
Food Traceability

Tech has broad implications for operational optimisation

HOS & DVIR Compliance

The existing GPS Tracking and Ignition sensor can help derive HOS and keep it to mandated limit. The similar system can be used to file and generate DVIR.

GPS Tracking & Routing

GPS tracking makes the driver execute the exact route, geo-fence truck with expensive shipment and avoid entering inter-city roads as shortcuts.

Self-Vehicle Diagnostics

The ECM system provides ample operational data that can be converted into actionable items like self servicing module or real-time failure rectifications.

Driver Management

Monitor the driving behavior of your drivers for harsh braking, rash driving, idle times and fuel consumption patterns that helps system to create driver profiles

Environment & Theft control

The reed control sensor and temperature/humidity sensors can be programmed to maintain a specific environment while shipping sensitive cargos

Fleet management using
Internet of Things (IOT)

Technology enables regulatory compliance



WELCOME TO NUTRITICS v4.0



Wide-ranging longer term implications as technology evolves



Critical Strategic Issue

#7

**Diets re-defined: the changing
palate of the Irish consumer**

Health-oriented concepts showcase changing consumer demands



SPROUT
KITCHEN

**UGLY
VEGETABLES
TASTE
AMAZING**

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HEALTHY, SEASONAL & LOCAL

**FOOD
TASTES
BEST
WHEN IT'S
IN SEASON**

SPROUT
KITCHEN

Health-oriented concepts showcase changing consumer demands



Stacks Healthy Kitchen
@stackshealthykitchen

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Notifications

Like Follow Share ...

Send Message

Create post

Write a post...

4.8 out of 5 · Based on the opinion of 16 people

Health Diversifies



- Classics go plant-based
- Functional callouts
- Significant focus on sustainability



Critical Strategic Issue

#8

Conscious operating practices the new standard

Packaging sustainability has become a major issue





Dunkin' Donuts built a tiny, sustainable home that's powered only by recycled coffee grounds



Eben Diskin, Matador Network

Oct. 16, 2018, 10:02 PM 32



FACEBOOK



LINKEDIN



TWITTER



- Dunkin' Donuts collaborated with New Frontier Tiny Home to build a 275-square-foot house powered by excess oils from recycled coffee grounds.
- Actress Olivia Wilde decorated the interior with black-stained, coffee-hued wood as well as pink and orange details inspired by Dunkin' Donuts' brand colours.
- The house is intended to demonstrate the efficiency of clean, sustainable energy.



Critical Strategic Issue

#9

**Approaching Brexit, uncertainty
is the only constant**

NEWS SPORT **BUSINESS** OPINION LIFE & STYLE CULTURE MORE

Impact of Brexit on Ireland to be ‘negative and significant’

Significant resources must be set aside in readiness for impending risks, warns IMF

🕒 Sat, May 13, 2017, 01:00

Cliff Taylor, Charlie Taylor





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No-deal Brexit could cost Ireland more than 50,000 jobs, IMF warns

Washington-based fund study finds hard Brexit would hit State severely

🕒 Thu, Jul 19, 2018, 18:24

Updated: Thu, Jul 19, 2018, 21:20

Eoin Burke-Kennedy



World ► Europe US Americas Asia Australia Middle East Africa Inequality Cities Global development

IRELAND

Brexit could ruin Ireland's food industry, Bruton and Ahern tell Lords

Former prime ministers John Bruton and Bertie Ahern issue warning about possible common external tariffs between Ireland and the UK

Patrick Wintour *Diplomatic editor*

Tue 25 Oct 2016 19.25 BST



Ireland and Brexit - preparing for the worst

John Spain @IrishCentral | Jul 18, 2018

10
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“If a last minute deal can be reached that will mean a hard border in Ireland as an unintended consequence, one wonders whether the rest of the EU would stick with the backstop.”



Last week, two years after the British referendum vote to leave the EU, we got the first detailed statement on what the British government wants to achieve with Brexit.

Foodservice industry primarily concerned with...



SUPPLY CHAIN/
LOGISTICS



SOURCING



HIGHER
PRICES

Business

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Why a Brexit might be good for Ireland

Peter Casey
July 13 2014 2:30 AM

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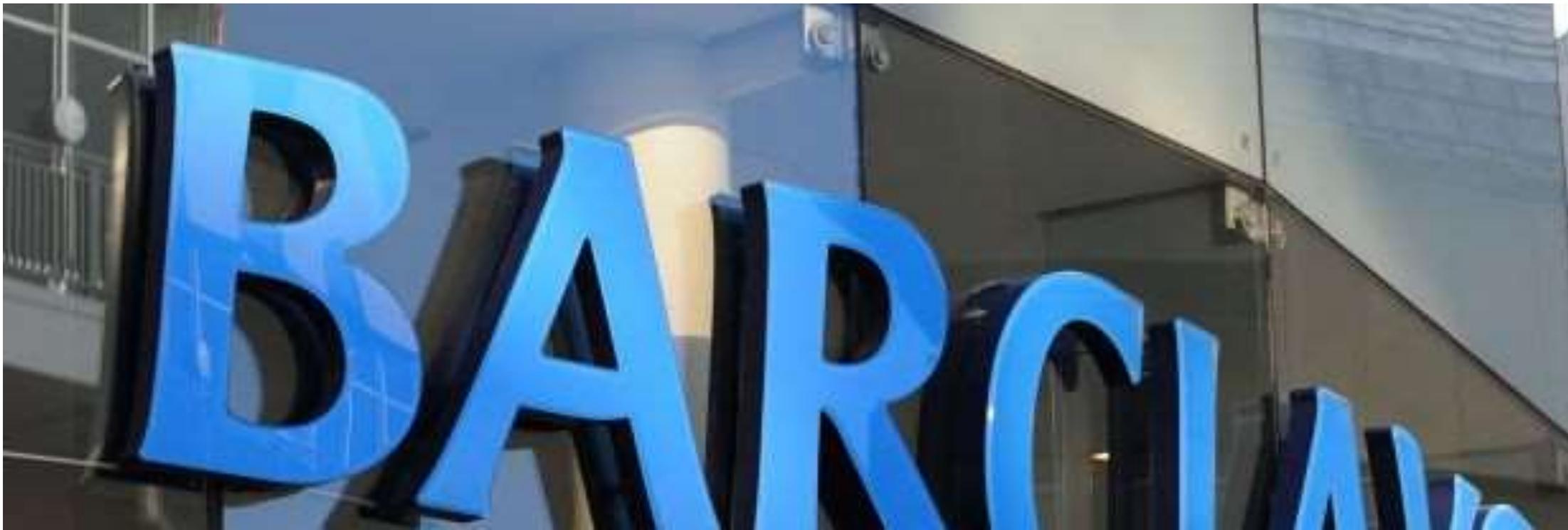
MORE

Barclays seeking to move €250bn business to Republic ahead of Brexit

Bank to ask court to allow it to transfer its non-UK European business to Dublin office

🕒 Wed, Oct 31, 2018, 05:53

Barry O'Halloran



so
what?

1

**Continue
to monitor
and plan
for Brexit**

2

**Invest in
socially
responsible
practices**

3

**Have a
strong
focus on
cost control**

4

**At the same
time, invest in
differentiation
in all aspects of
the business**

5

**Incorporate
critical strategic
issues into long-
term planning
processes**

9 Critical Strategic Issues



Boom times drive growth, but create major challenges

Channels blur as food becomes point of differentiation



Today's Irish consumer has new demands

The Pro's and Woes of Ireland's Growing On Demand Foodservice Culture



Adopting the Millennial State of Mind: Tech Forward, Automated

Diets re-defined, the changing palate of the Irish consumer



Operating with a conscience is the expectation, not the exception

Approaching Brexit, uncertainty is the only constant



Foreign investment changing the nature of competition in Irish foodservice

