

Progress in Sustainability and Market Developments in the Irish Poultry Sector

POULTRY & EGG conference

Peter Duggan

9th November 2016



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Bord Bia
Irish Food Board

What is Origin Green?

- **Business to business initiative**
- **Companies sign up to Sustainability Charter**
- **Farmers participate in Quality & Sustainability Schemes**



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Perceptions of Ireland...

Viewed as green &
natural...

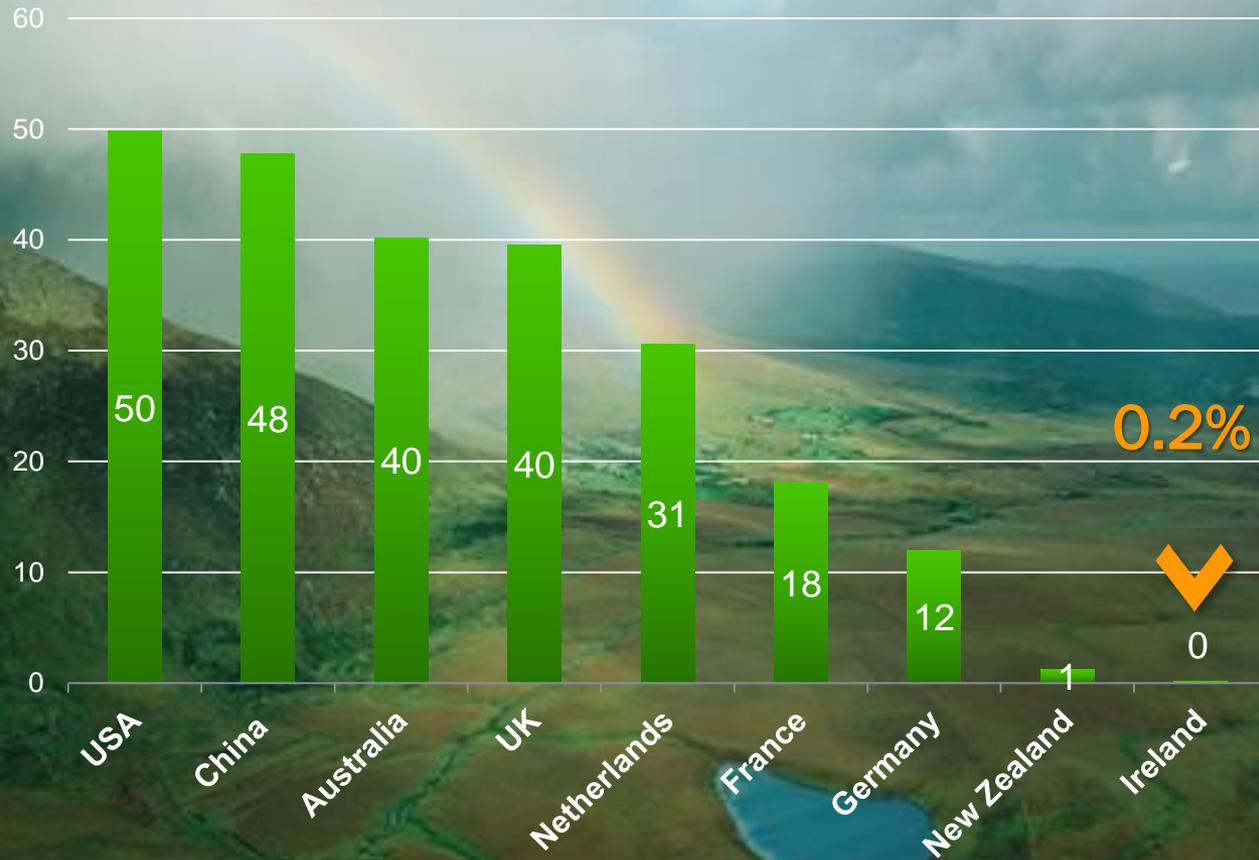
We now need to prove it...

IRELAND'S NATURAL ATTRIBUTES

WATER AVAILABILITY

AGRICULTURE USES 70% OF
THE WORLD'S FRESHWATER

Ireland has a very favourable
water stress index
(% of territory under water stress)



Source: Growingblue.com

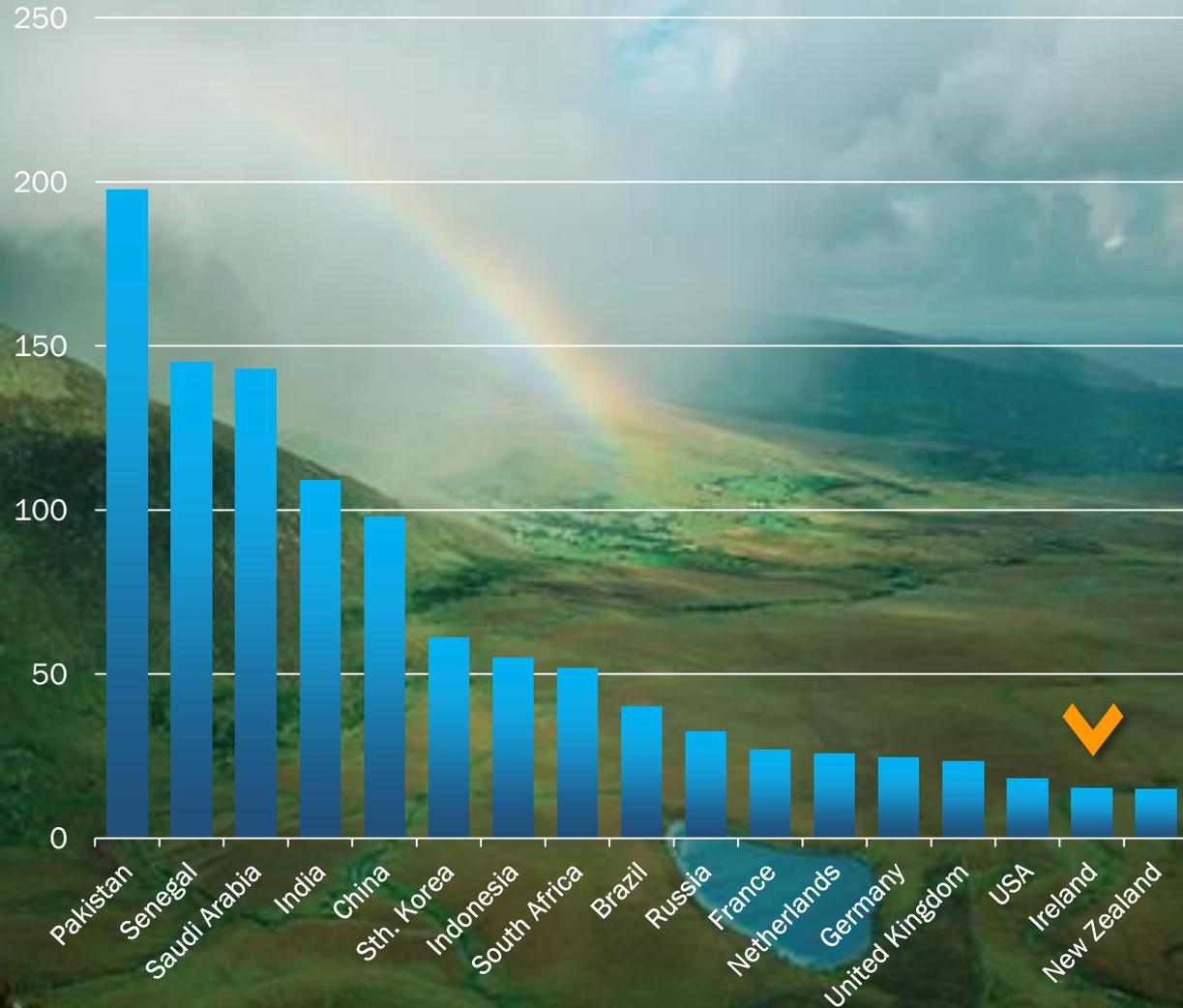
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IRELAND'S NATURAL ATTRIBUTES

AIR QUALITY VERY HIGH

Urban Outdoor Air Pollution Annual mean PM10 ($\mu\text{g}/\text{m}^3$)



Source: World Health Organisation

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**Origin Green at
Company Level**



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English

an initiative by **Bord Bia**
Irish Food Board

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SGS

Verified Members

Origin Green Verified Members have a proven and measured commitment to sustainability.

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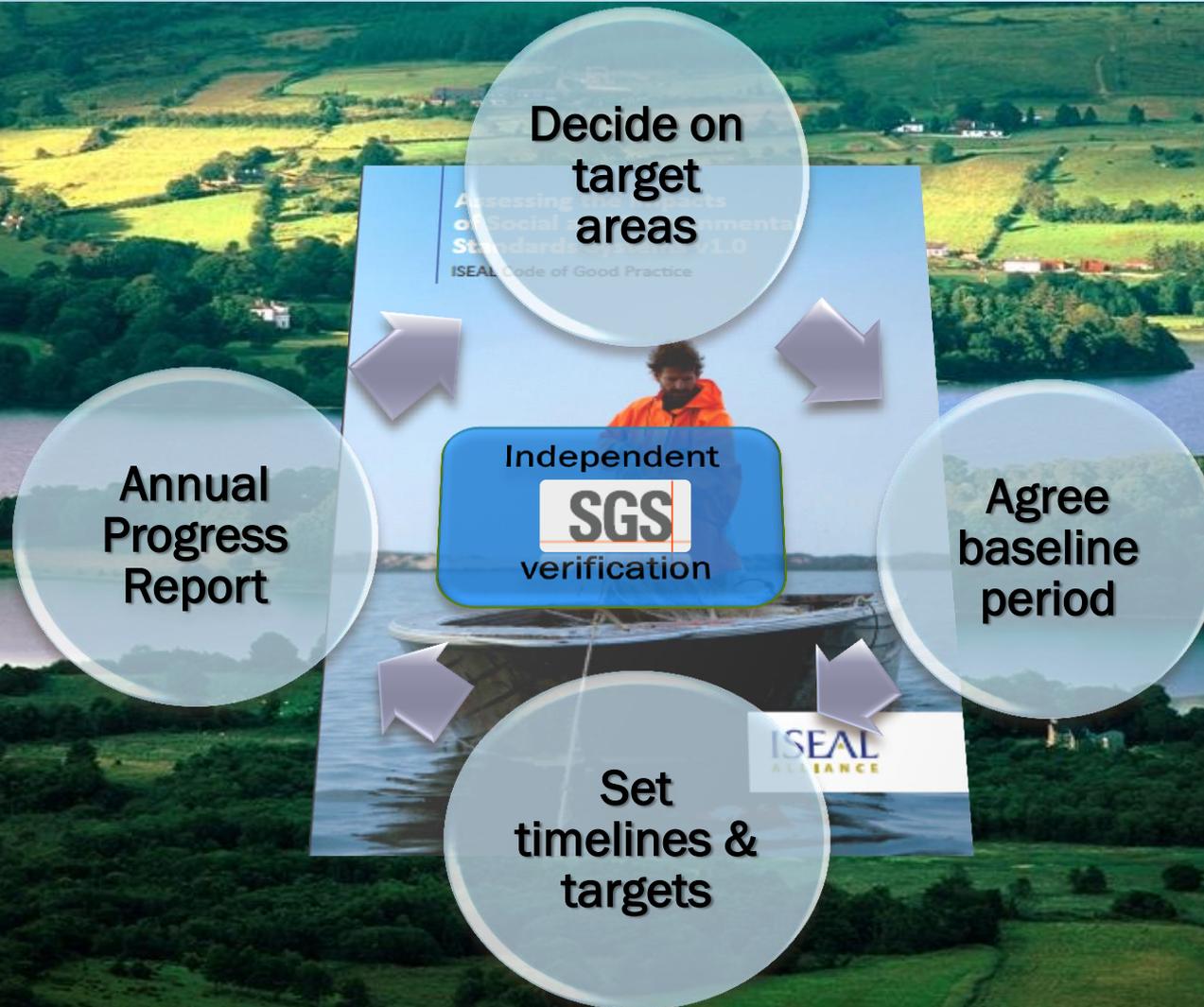
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ORIGIN GREEN VERIFIED MEMBERS



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The Sustainability Charter



Origin Green Verified Members

Company Recruitment Pipeline

507 Companies Registered

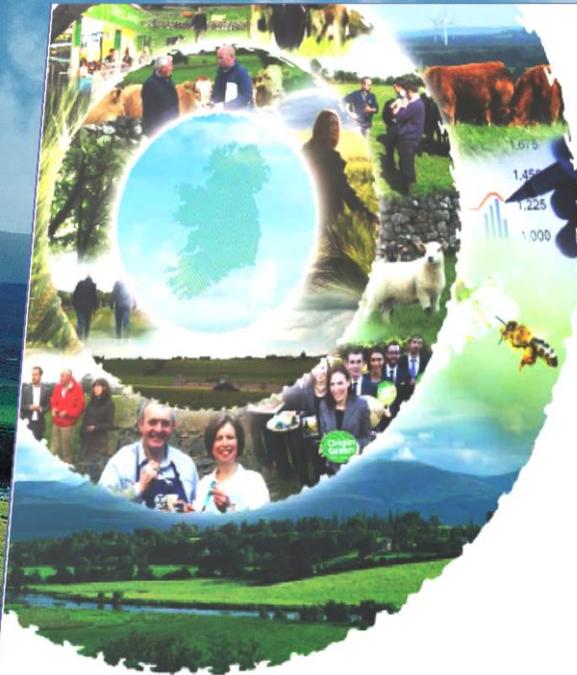
95% of exports

182 companies at workshop/
plan development phase

145 plans being processed

180 plans accepted

Over 85% of exports



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SUSTAINABILITY REPORT 2015

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More than 1,000 Targets Set



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Advocates of Origin Green

“Just last year, I had an opportunity which was phenomenal. I had the opportunity to experience firsthand the great work that we’re doing in Ireland and the industry leading approach that Ireland has taken to agriculture”

**Don Thompson, CEO
McDonalds**



THE WORLD BANK

Ireland is leading the way in another important area – climate smart agriculture. Its Origin Green program has mobilized Irish farmers and food producers to set and achieve measurable sustainability targets.....we’re helping other countries learn from this model

Jim Yong Kim, World Bank President



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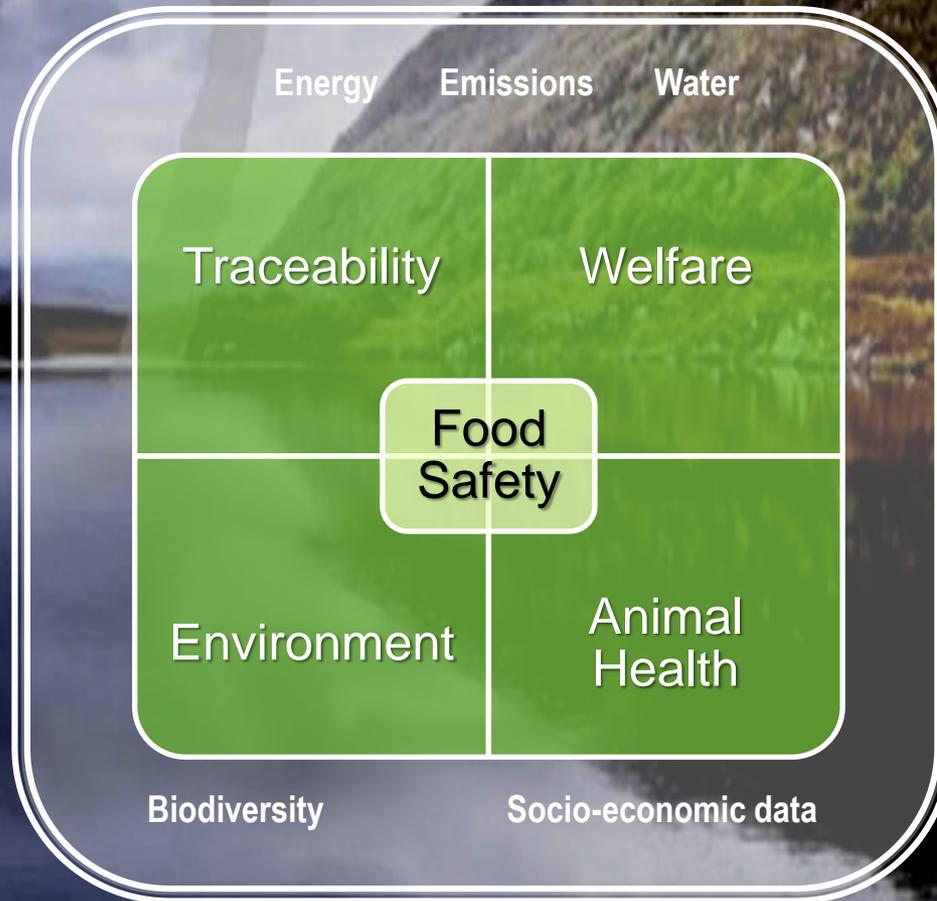


Farm level developments

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Measuring What Matters



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Farm Quality & Sustainability Audits



48,000 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

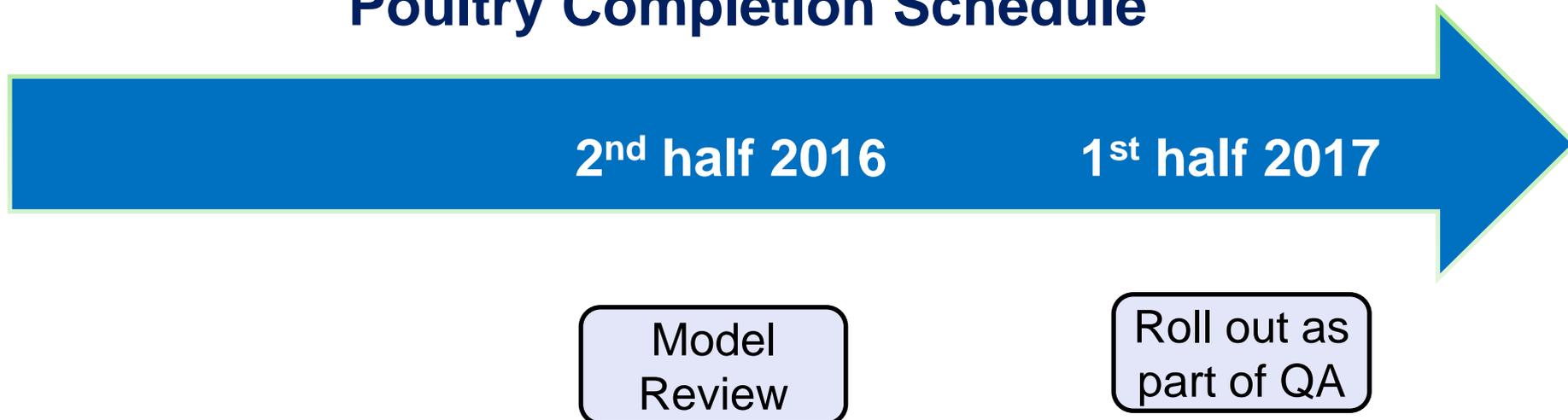
Sustainability measures being implemented

110,000 carbon assessments on farms to date

Egg – Sustainability Model

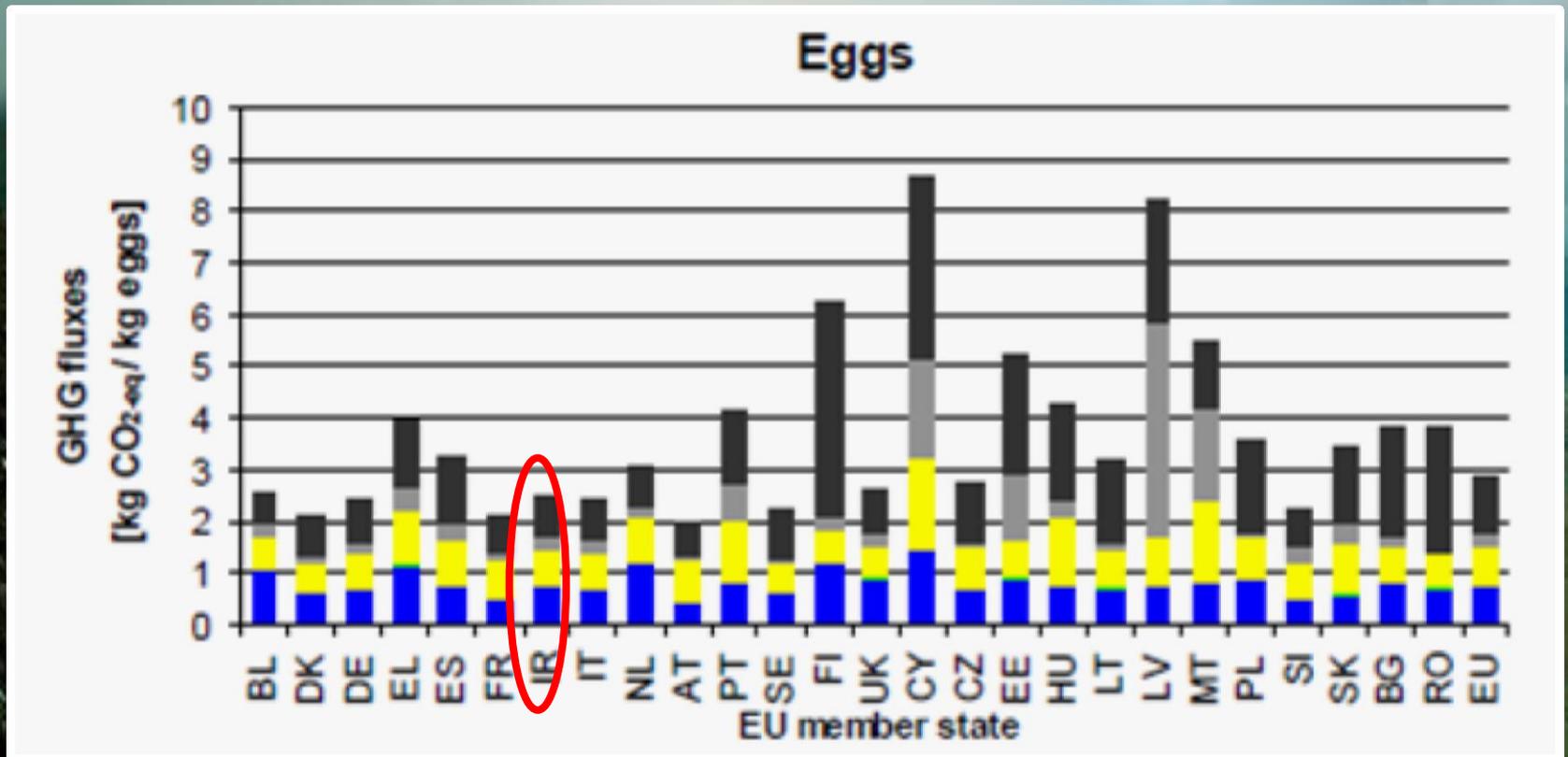


Poultry Completion Schedule



Key factors in Sustainable Production

Greenhouse Gas Emissions



Source: EU JRC Evaluation of the livestock sector's contribution to the EU greenhouse gas emissions (GGELS)

Egg Sustainability Criteria

- ❖ Productivity levels
- ❖ Feeds
- ❖ Manure management
- ❖ Energy use
- ❖ Water use
- ❖ Biodiversity measures
- ❖ Socio- Economic
- ❖ Land Management
(free range)

Poultry – Sustainability Model

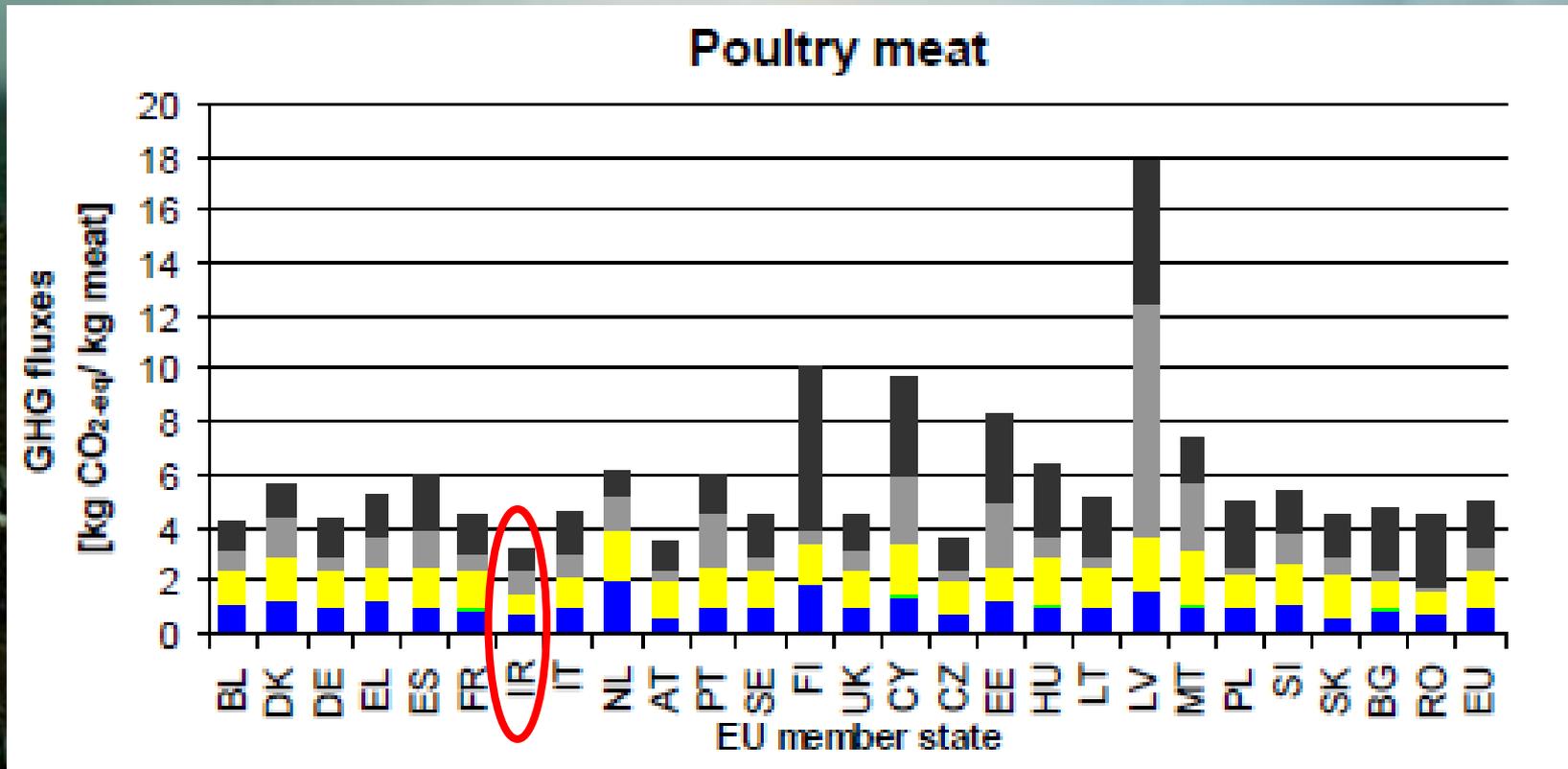


Poultry Completion Schedule



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Market Developments

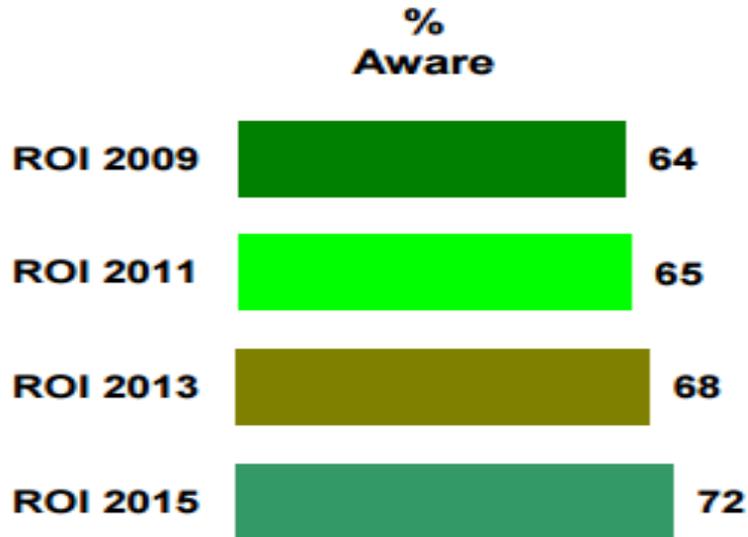
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What is driving sustainability?

Awareness of the Term Carbon Footprint

2015 - Bord Bia Periscope Report



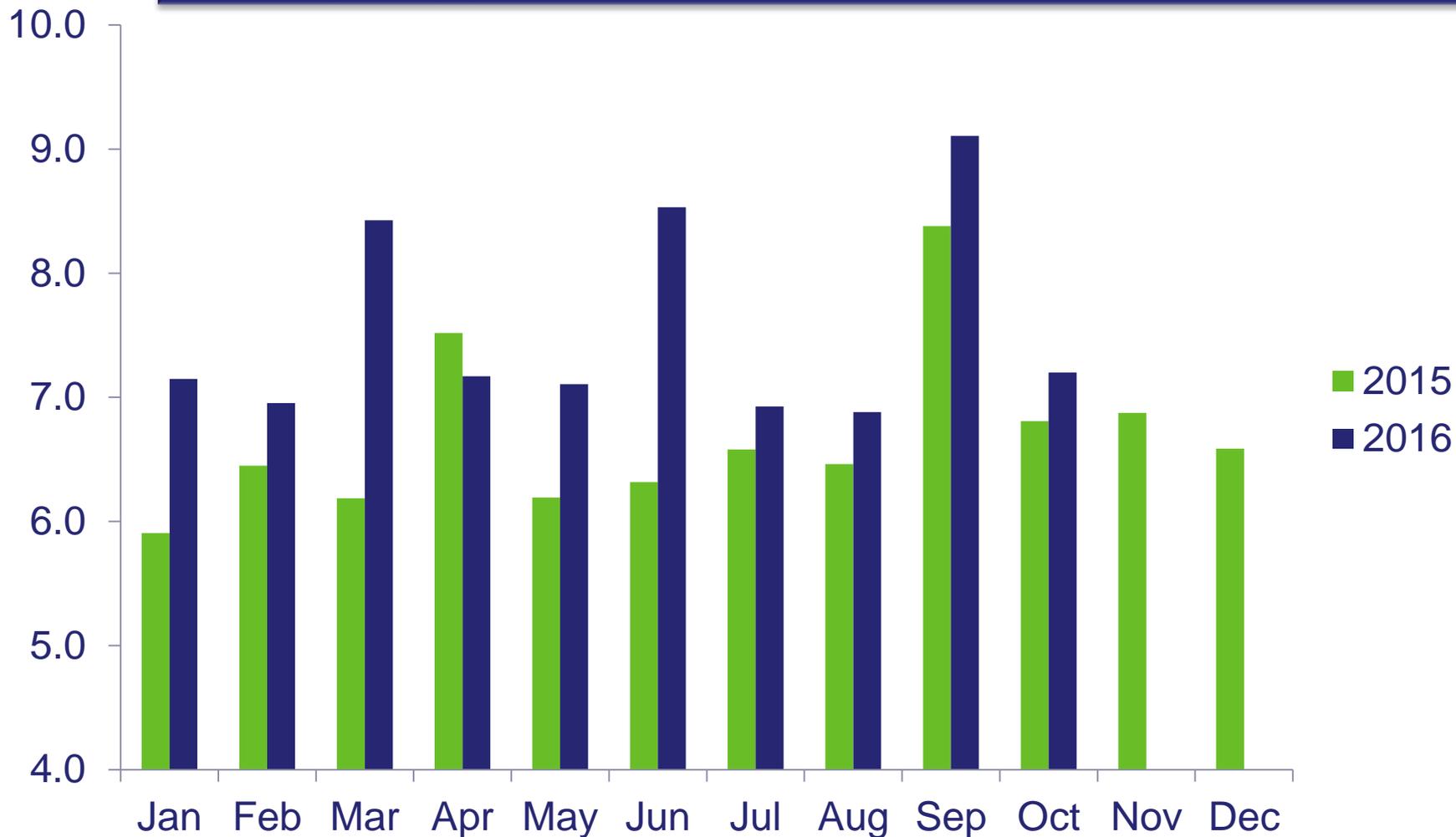
In 2015, Higher Amongst:

- 35-54 yrs
- AB's
- Responsible for grocery shopping
- Entertain at home more often

Irish poultry supplies running at record levels

Poultry supplies on track to exceed 90 million birds

Million head

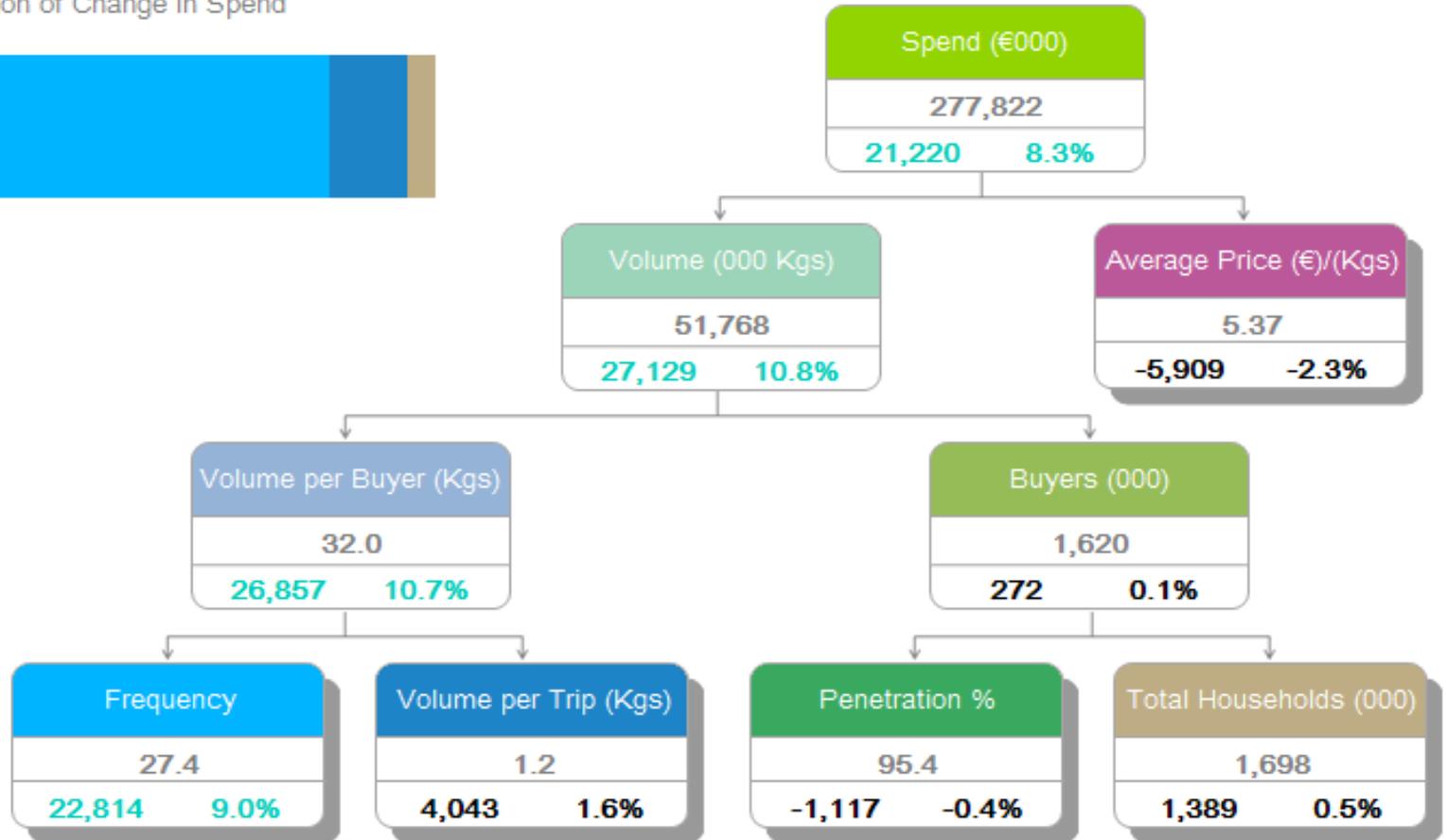
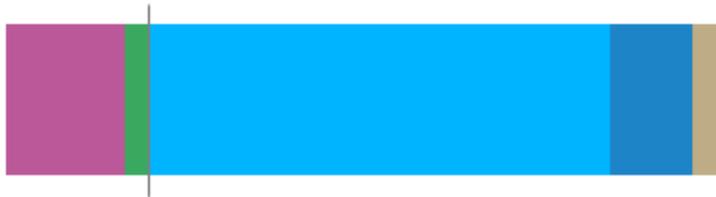


Poultry Consumption 11% higher

09-Oct-16 vs. Previous Year

Total Poultry | TOTAL MARKET | Total Meat | Total Market | 52 w/e | Previous Year

Attribution of Change in Spend

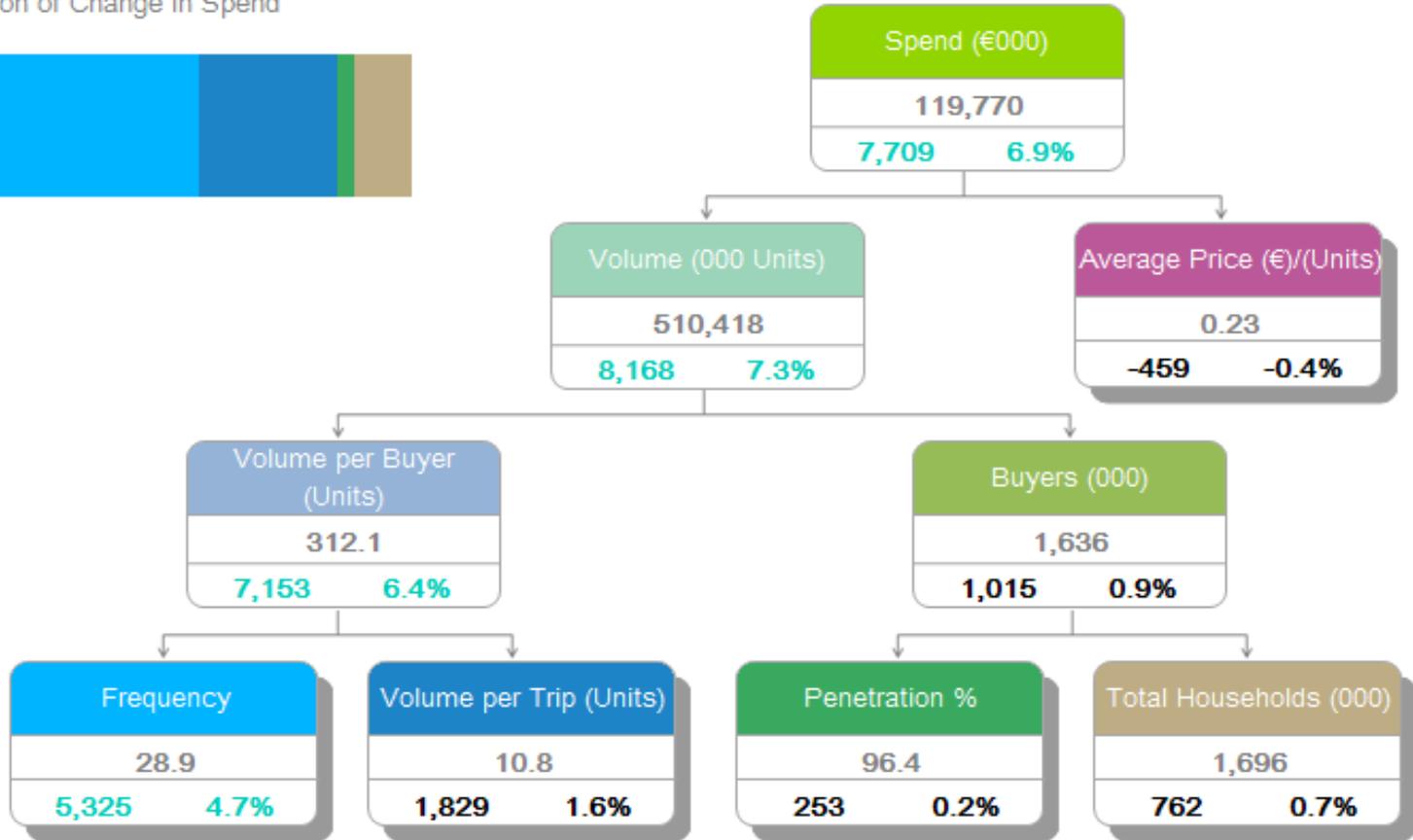
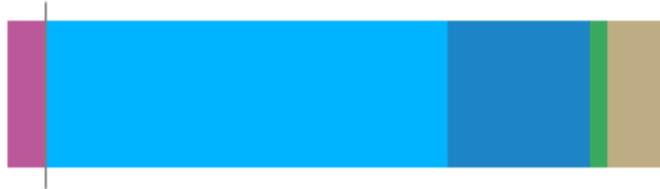


KEY
■ => 3% Change
■ =< -3% Change

Total Eggs Consumption 7% higher

The main contributor to growth has been an increase in frequency.

Attribution of Change in Spend



KEY
■ = > 3% Change
■ = < -3% Change

Target Demographic

Pre-
family

20-45 year olds, male & female shoppers, no children, health conscious.
Approx. 321,000

Only **1 in 4** of pre-family life stage consumers consider Eggs to be top of their shopping list – a key opportunity for growth.



GET YOURSELF A SIX PACK EGGS. HIGH IN PROTEIN.



Your food is our passion



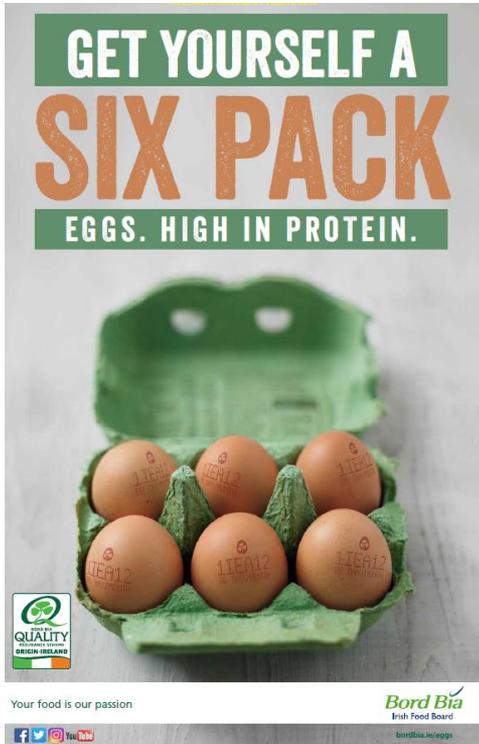
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bordbia.ie/eggs

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October 2016: Campaign Creative

“Get yourself a six pack”

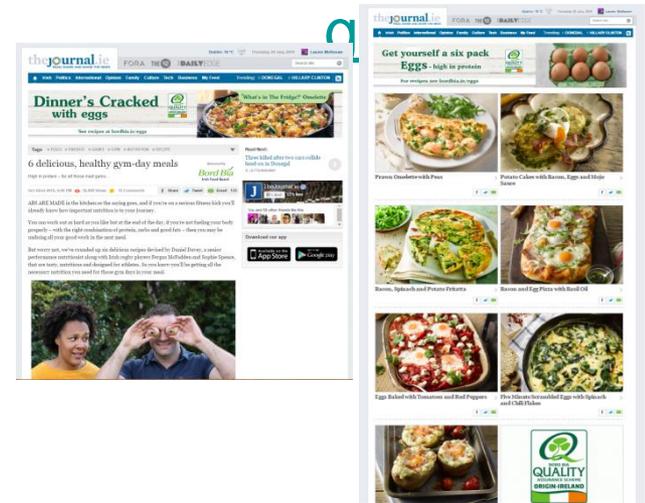


OUTDOOR



RADIO

www.bordbia.ie/e



DIGITAL

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October 2016: Social Media (recipe videos)



- Created 10 new Egg recipe videos for 2016
- Demonstrating the versatility of Eggs to Irish consumers by focusing on lunch and dinner recipes



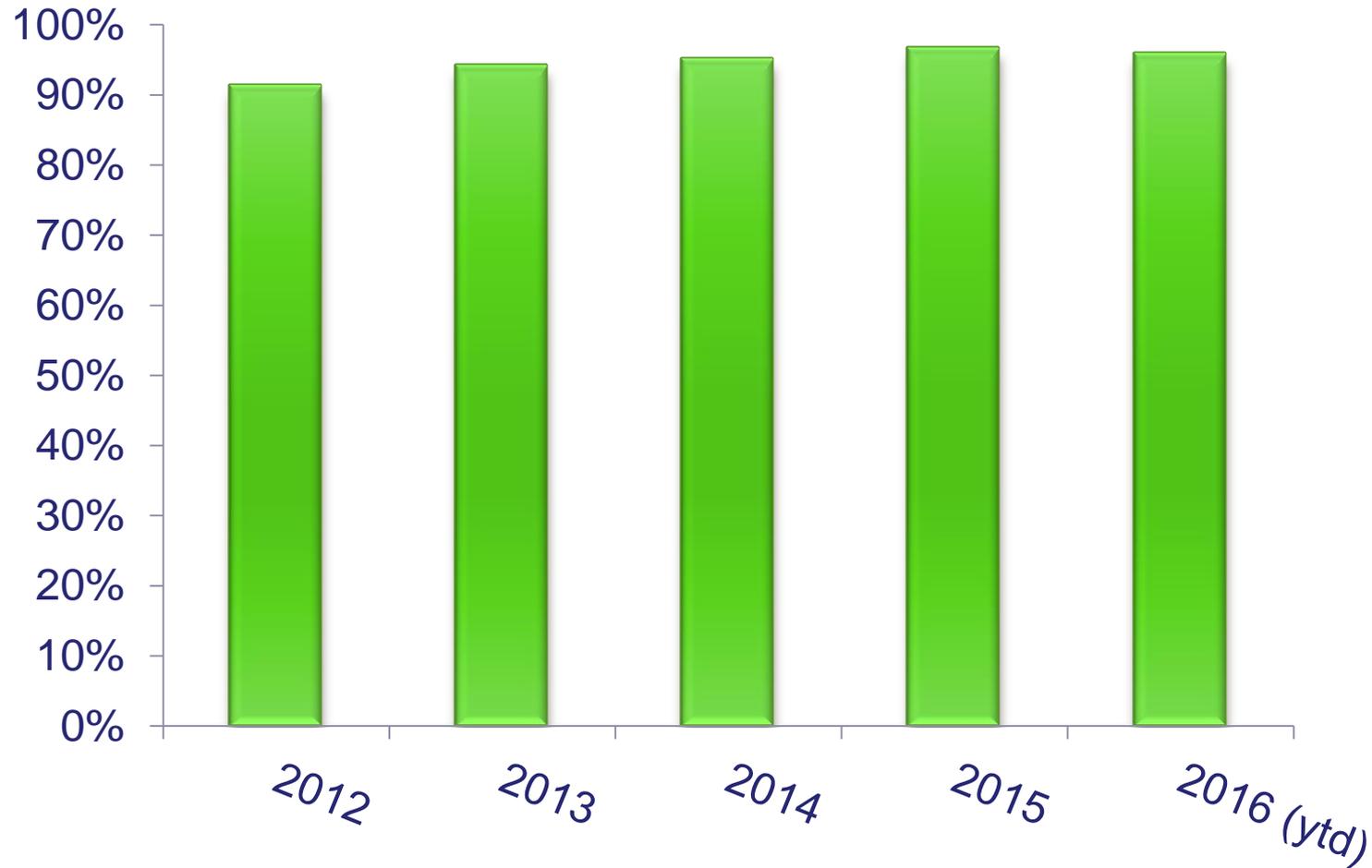
225K Views

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% Bord Bia QA Egg Facings at Retail





Market Developments- Brexit

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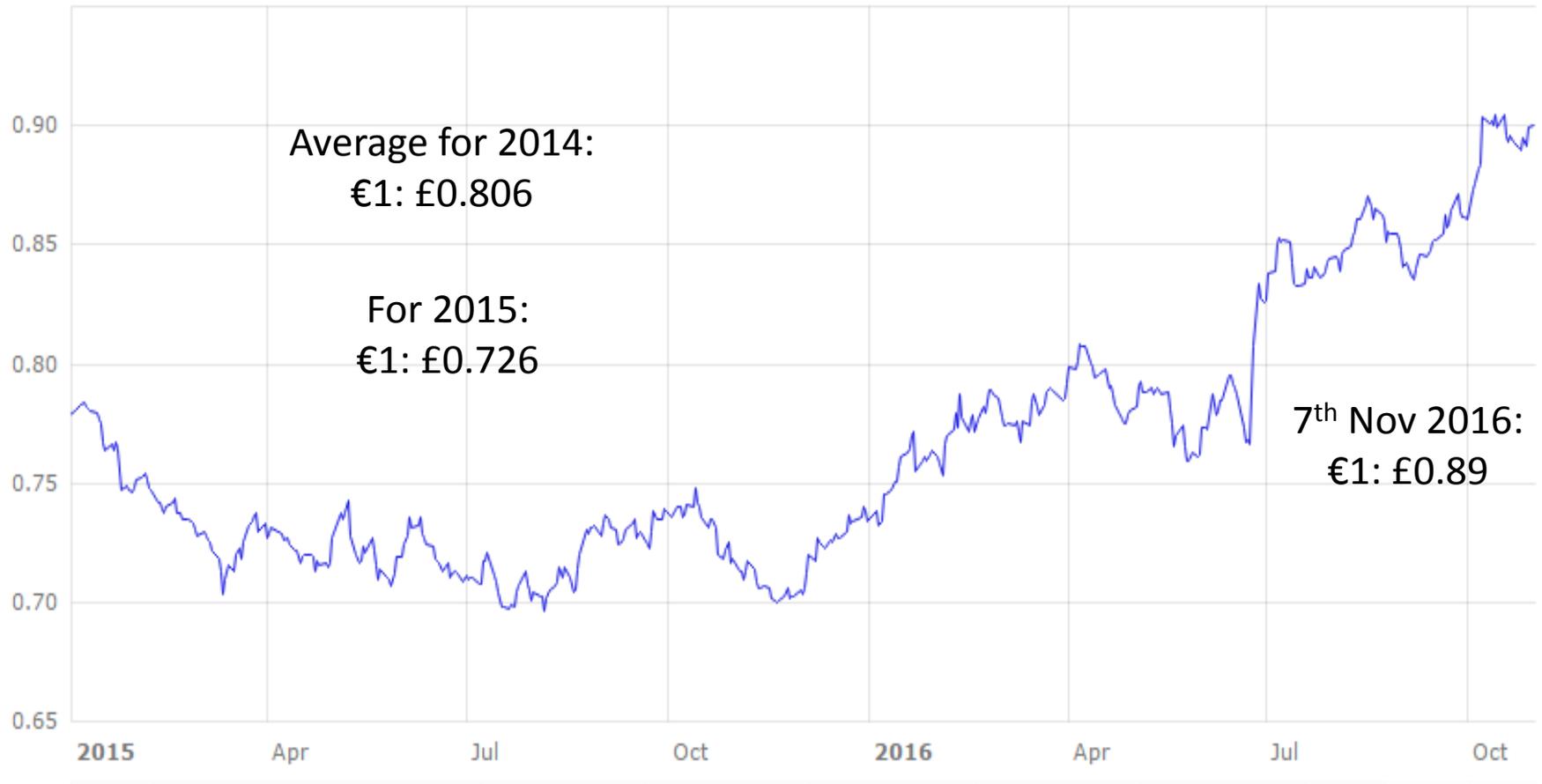
One in 3 will search out new markets

Two in 3 are looking at cutting costs & increasing prices

Bord Bia Client Survey- 2016

Currency Exchange Rates

Value of Euro in Sterling terms



Bord Bia Brexit Response

- ✓ **Marketing Intensification Programme**
- ✓ **Currency/Negotiation workshops**
- ✓ **Consumer insight**
- ✓ **One to one meetings with buyers**
- ✓ **High level meetings with principal UK retailers**
- ✓ **Developing promotional activities in the UK**

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