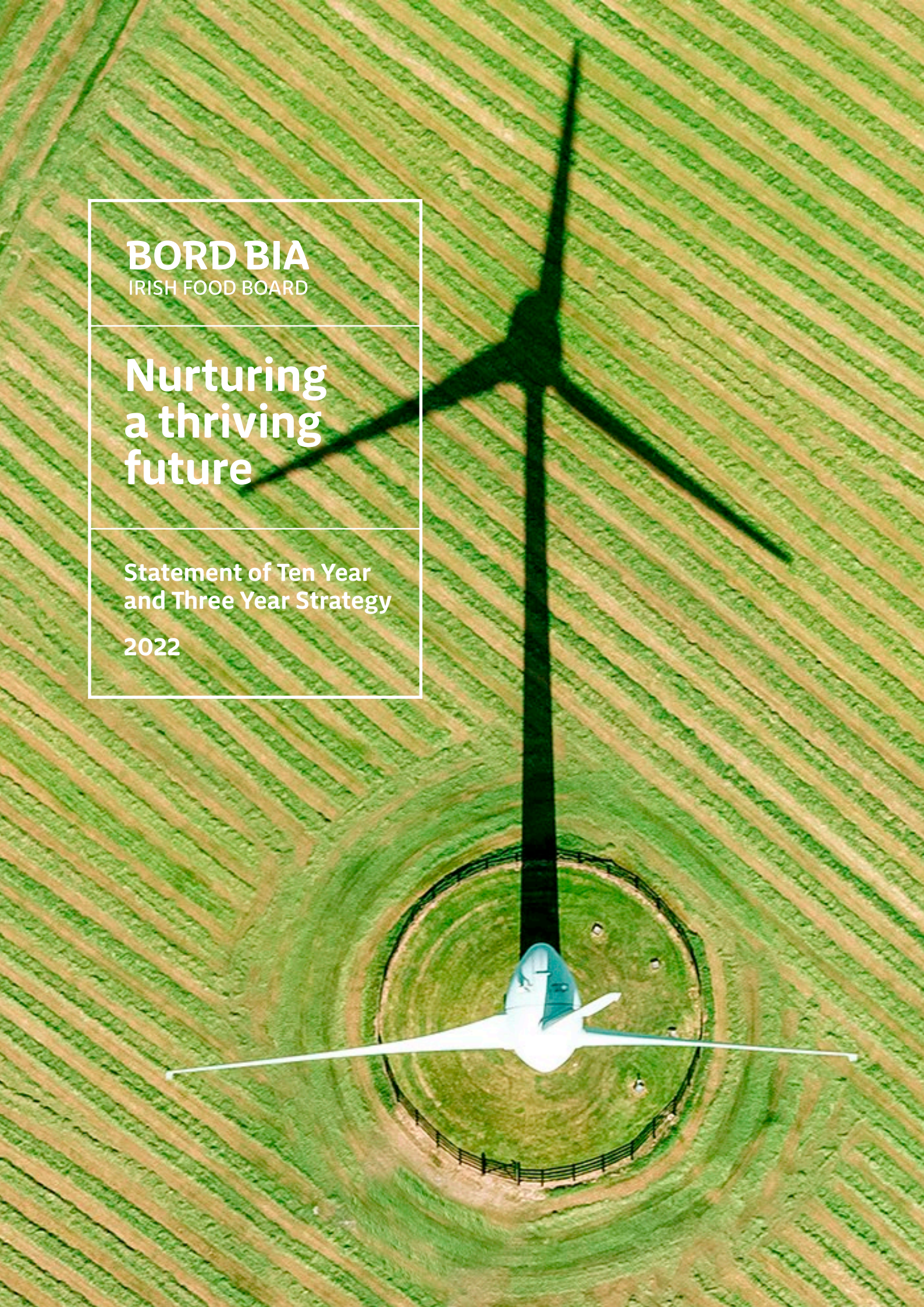


BORD BIA
IRISH FOOD BOARD

Nurturing a thriving future

Statement of Ten Year and Three Year Strategy

2022



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perspective, nor an economic perspective. Food Vision recognises that developing new market opportunities at home and abroad should remain a key priority, and Bord Bia will have a significant role in achieving this ambition.

As Bord Bia tentatively moves into the post-pandemic world, it is timely to take stock and set out strategic ambitions for the years ahead. In this Statement of Strategy, Bord Bia has made the conscious decision to look long-term with a 10-year vision for the future.

This 10-year horizon allows Bord Bia to plan for the macro-shifts that will occur in the global marketplace. It may be difficult to predict the timing of game-changing events, like a global pandemic, but Bord Bia knows that sustainability will continue to be a fundamental driver of change of the food, drink and horticulture industry.

Our 10-year strategy reflects and builds on the wider ambitions outlined in Food Vision 2030 to help achieve the vision, that over the course of the next 10 years Ireland will become a world leader in Sustainable Food Systems (SFS).

This will deliver significant benefits for the Irish agri-food sector, for Irish society and the environment. Critically, for us in Bord Bia, the leadership position the country will take up will provide the basis for future competitive advantage.

The Bord Bia strategies will also build on the commitments in the Programme for Government concerning the promotion of the agri-food sector including the organic sector, actions of the Climate Action Plan and of the Review of Organic Food Sector and Strategy for its Development 2019 – 2025.

Bord Bia's work on this 10-year journey starts in 2022 and Bord Bia's three year strategy, also detailed in this document, highlights a clear road-map for the organisation around the world. Bord Bia has set out clear business objectives for each key sector and will deliver on these objectives against a number of core strategic questions. The new Bord Bia strategy identifies five 'jobs to be done' by the Bord Bia team over the next three years. Bord Bia calls these the Bord Bia "We Must Dos", signifying the strategic imperative that each element of the strategy holds for Bord Bia.

Sustainability will be at the heart of all of Bord Bia's work over the next three years, building strength in sustainability is a strategic enabler for the industry. So too will be the digital transformation of Bord Bia; both in ways of working and in digital marketing.

The Bord Bia team has made a very concerted effort to respond to the challenges of Covid-19 as One Team over the past two years through a programme of organisational transformation. Bord Bia calls this organisational transformation One Bord Bia, it is a transformation that sees Bord Bia build strength through unity and clarity of purpose.

The future may never be written in advance but one thing is certain, change is a constant. As Bord Bia set out on this journey over the next three and ten years, Bord Bia's ambition is clear. Bord Bia are nurturing a thriving future for Irish food, drink and horticulture.

Dan MacSweeney
Chair

Tara McCarthy
CEO



INTRODUCTION

Chair and CEO Statement

In 2021, Irish food and drink exports were worth €13.5 billion. That represents over €2 billion, 18% growth in value since 2016 – the year of the Brexit referendum. It is also a return to year on year (YOY) growth after the significant market disruptions in 2020 with the onset of the Covid-19 pandemic and the implementation of the withdrawal agreement between the European Union (EU) and the United Kingdom (UK). Despite the significant shock the world economy has endured, our industry has proven itself to be a resilient one.

As Bord Bia set out in our previous three year strategy, Bord Bia is committed to quick and fast responses to an ever-changing business environment. In March 2020, Bord Bia responded to the changing realities of doing business, imposed as a result of the Covid-19 pandemic. By embracing digital technology and the emerging role hybrid working and marketing offers us, Bord Bia has continued to support the Irish food, drink and horticulture industry's global ambitions.

At European level, the European Green Deal (EGD), including the Farm to Fork (F2F) and Biodiversity Strategies, represent a fundamental shift in EU policy direction, and this will also be reflected in the new CAP Strategic Plan.

Our new three year strategy for Bord Bia has been developed in the context of the wider policy ambitions set out in Food Vision 2030 – it provides Bord Bia with a roadmap of activities that align to wider more long term ambitions for Ireland.

Food Vision 2030 emphasises the need to strengthen and invest in Origin Green and other sustainability supports, to reflect the higher level of environmental ambition for the agri-food sector. Food Vision also proposes expansion in nature-based production systems, tillage, horticulture and organic production; and Bord Bia will be central to the delivery of that vision for the country.

All of this does not mean that Ireland should make radical changes from its role as a producer and exporter of safe, high quality and sustainably produced livestock products: this would not make sense from a global environmental or nutrition

INTRODUCTION

Bord Bia Operating Model

The ten year and three year corporate strategies detailed in this document are the bedrock of how Bord Bia will operate in the years ahead. As part of the strategy development process Bord Bia has developed an operating model for the organisation that connects the functional teams in Bord Bia like never before.

We call this organisational transformation One Bord Bia.

The voice of our clients and the voice of their customers is at the heart of our new three year strategy. Our Sectors team, working with our Global Business Development team, have identified strategic priorities that will drive our activities around the world and across the organisation.

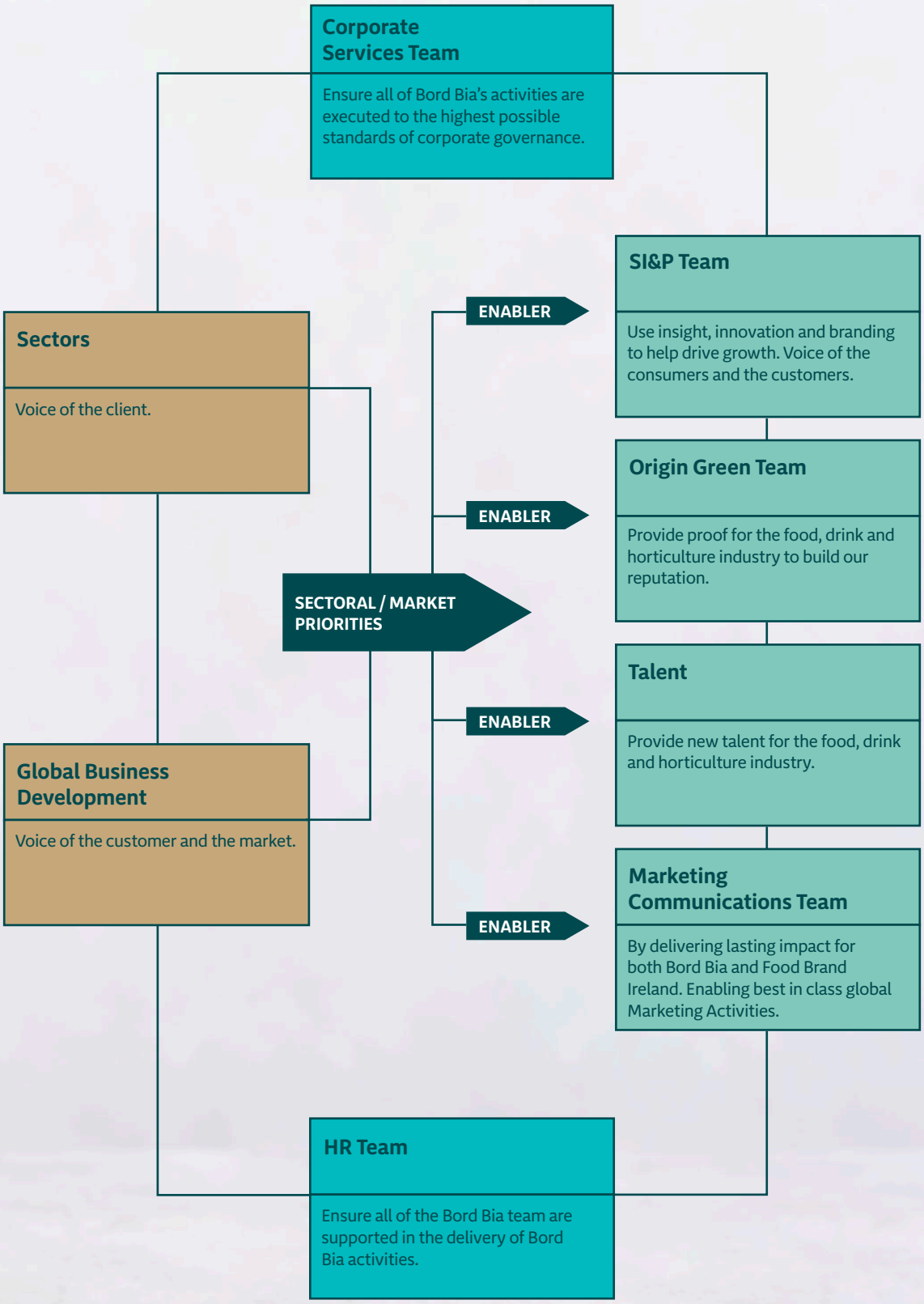
Strategic Insight and Planning, Origin Green, Talent and Market Communications are enablers of these priorities. Every activity Bord Bia engages in is designed to deliver on these strategic priorities.

The One Bord Bia operating model will guide the execution of Bord Bia's three year strategy to 2025 to deliver on Bord Bia's ambitions.



BORD BIA OPERATING MODEL

CORPORATE STRATEGY



BORD BIA
IRISH FOOD BOARD

Bord Bia 10 Year Strategy

02

Overview and Strategic Context

As Bord Bia considers the most meaningful way to contribute to the growth in value of Irish food, drink and horticulture in the coming decade, the need for holistic thinking is clear. We have entered a decade when collaborative thinking and collective action are needed to meet the needs of our planet and consumer alike.

We arrive to 2021 with a substantial and well-earned reputation for our island nation in the world of food, drink and horticulture. The strength of our reputation cannot be taken for granted and needs protection and enhancement, rooted in credible sustainability leadership and resonating with consumer and customer needs. The challenge is to build market opportunity by optimising our industry's relevance for the world's consumers whose needs and desires constantly evolve. As the state-body responsible for the marketing of Irish food, drink and horticulture, Bord Bia is a conduit for the continued success of Ireland's food and drink producers (farmers, fishers, growers, manufacturers) who enter this new decade ambitious to build new markets and bolster their position in current and emerging food categories.

Bord Bia has a unique position as an organisation as Bord Bia is exposed to every element of the supply chain. Over the next ten years Bord Bia's contribution to industry success will evolve as Bord Bia seeks to create value in new and innovative ways. Bord Bia's big unifying idea for the coming decade will be creating and capturing value all along the supply chain, from farm to fork, enabling, facilitating and working with all stakeholders across the chain.

The platform for Bord Bia to enable added value across the next ten years is composed of two main elements. Driving the reputation of Ireland and supporting the food, drink and horticulture industry with expertise and services to facilitate added value.



Driving the Reputation of Ireland



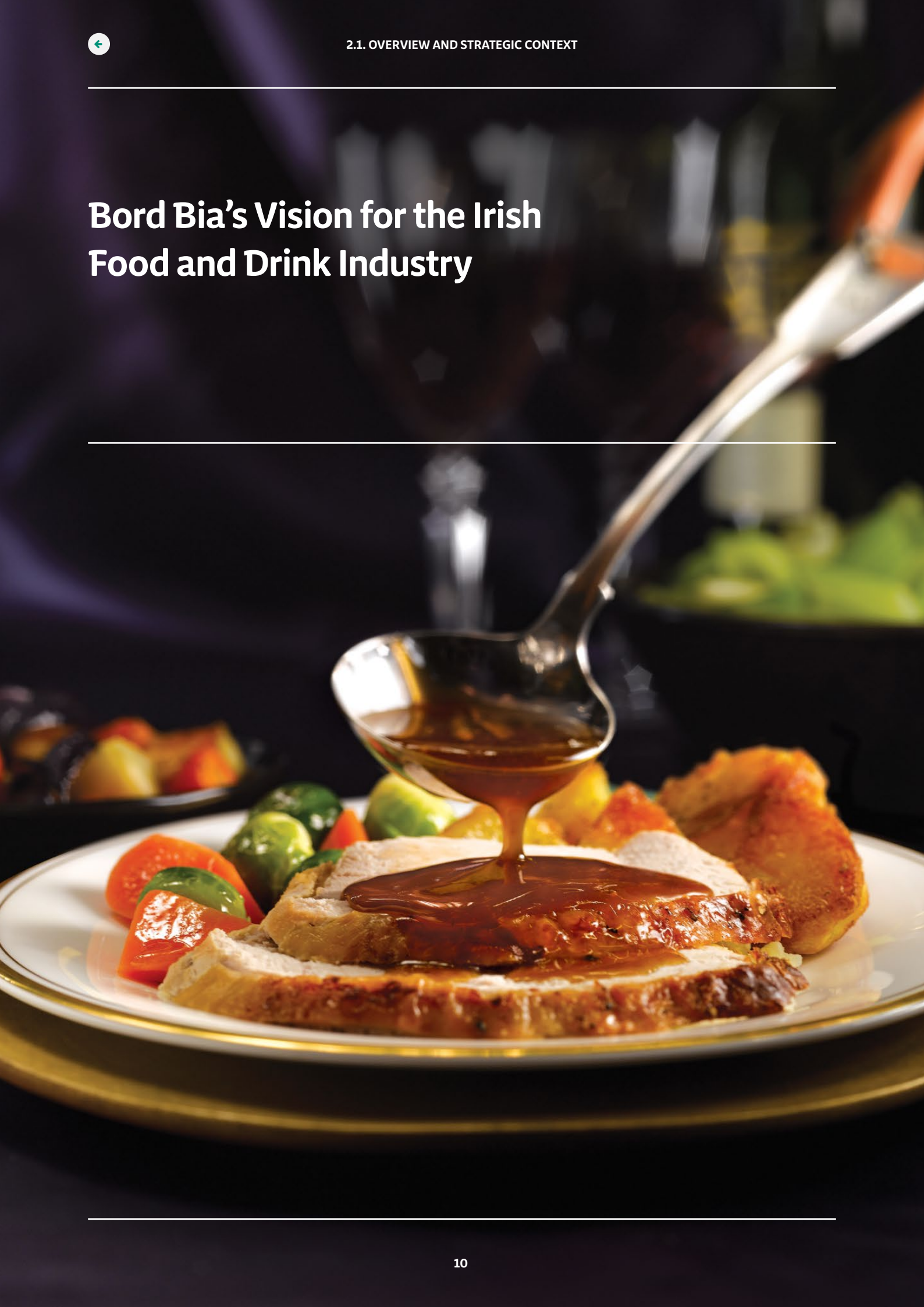
Supporting Industry for Success

Food Vision 2030, the 10 year strategy for the agri-food sector adopted by Government sets out four high-level missions to fulfil this ambition:

- A climate-smart, environmentally sustainable agri-food sector.
- Viable and resilient primary producers, with enhanced wellbeing.
- Food that is safe, nutritious and appealing, trusted and valued at home and abroad
- An innovative, competitive and resilient sector, driven by technology and talent.

The specific actions assigned to Bord Bia for each of those missions will be delivered as part of Bord Bia's 10 year vision, those actions being aligned with Ireland's ambition for the environmental, social and economic sustainability of the sector, and its Climate Action and related commitments.

Bord Bia's Vision for the Irish Food and Drink Industry



To have a consistent vision is to keep a steady course. Bord Bia's vision (outlined below) remains unchanged and articulates our intention to lead and support the production and marketing of world-class food and drink from Ireland, substantiated by Origin Green which itself is a world-class beacon of sustainability. This vision acts as a rallying cry of clarity and purpose, and the macro-trends point to serving it well.

Customers around the globe recognise that Irish food and drink is world-class: that it is high-quality, distinctive, and made by a diverse range of creative producers from a unique and fortuitous island location.

And our producers set the global standard in sustainable production - meeting the responsibility we all have to the planet, to society, and to future generations.

We have everything we need for a better, more sustainable food system. There has never been a better time to act, and set the example for the world.

BORD BIA'S PURPOSE

Bord Bia's purpose (right), helps to bring priority, focus and inspiration to the unique reason why Bord Bia exists. Our role is to play a significant part in the sustained success of Irish food, drink and horticulture while Bord Bia carries a huge sense of pride in Ireland's produce, its people, its place and its progress. Our focus is on supporting and enabling our producers, growers, fishers and farmers so that they can be at their best, bringing Ireland's outstanding food, drink and horticulture produce to the world.

Bord Bia sees our purpose as the guiding star for us, our reason for being to help clients achieve their goals.

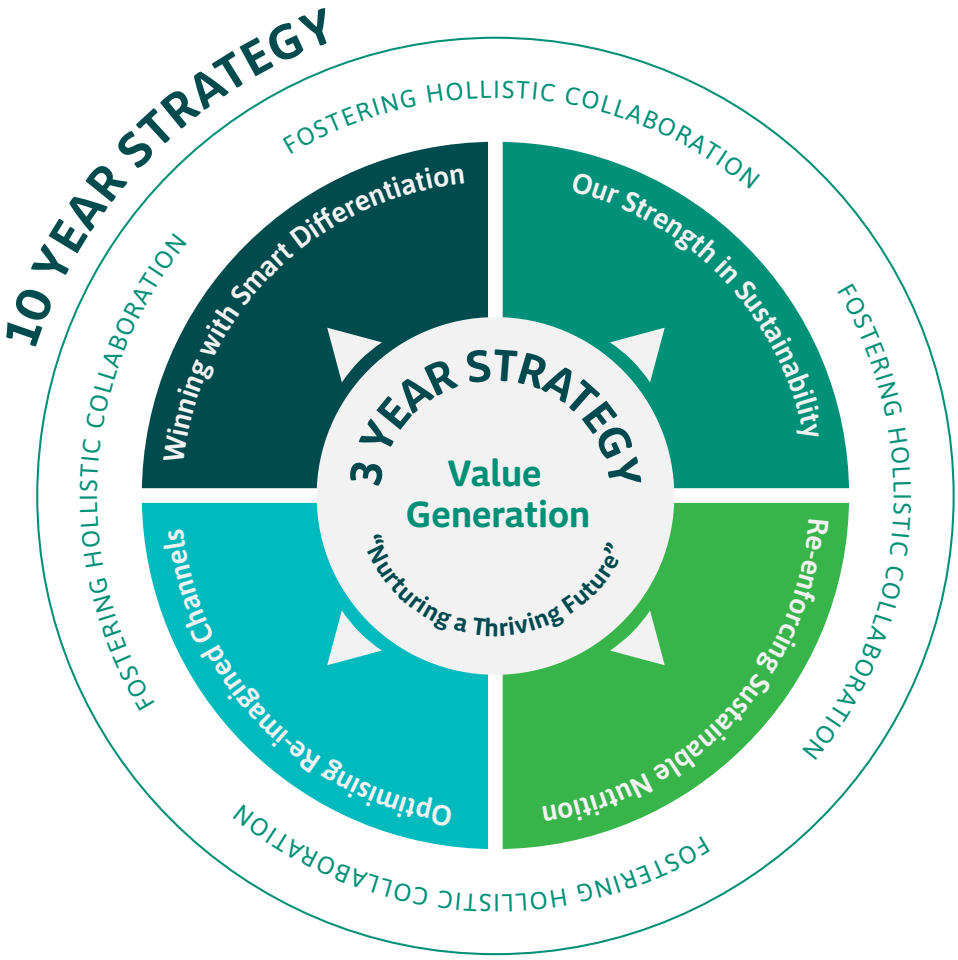
"To bring Ireland's outstanding food, drink and horticulture produce to the world, thus enabling the growth and sustainability of producers."

Value Capture and Creation



Over the next ten and three years our focus will be on value capture and creation. Every activity Bord Bia engages in as an organisation is designed to increase the value our client companies capture in the marketplace. Food Brand Ireland will drive **smart differentiation** and continue to help premiumise Irish food, drink and horticulture through a long-term equity build, by building on our **strength in sustainability.** Our insight-innovation and brand development work will help create value through a real focus on **sustainable nutrition**. And around the world Bord Bia will continue to capture value through access to **re-imagined channels**. Delivery of these actions being in line with our commitments to aligned Government strategies.

These themes will hold fast for the next ten years and will translate into integrated activity plans for the next three years.



The strategy will harness the accelerating power of sustainability, digitisation, and people; always striving to deliver on Bord Bia's proposition of 'Nurturing a Thriving Future'.

2.2. Winning with Smart Differentiation

2021–2031 is the decade of **expertise and specialism**, rather than generalists. Over the next ten years manufacturers and producers will have to tailor their offer to ever more demanding consumer cohorts. The era of mass-marketing is ending, targeted solutions for often very polarised groups will be the order of the day.

This will see the emergence of more and more groups of consumers who define themselves by their **differences** from each other; the flexitarian, the nutrition-focussed, the local climatarians, the functionally focused are just some of the emerging groups.

This plays to Ireland's strengths, as an **agile** food producer on the global stage – as it is an opportunity to lean into what makes our food, drink and horticulture special, different and relevant to discrete groups of global consumers.

As a small open-economy Bord Bia will continue to nurture **trade** relationships with customers in new and established markets. More than any other sector, food, drink and horticulture customer needs are shaped by the demands of the end-consumer. The opportunity for our industry is to differentiate ourselves with customers through world-class business to business marketing.

Responding to new and emerging needs is at the centre of **smart differentiation**; the opportunity for food producers is not to compete on price alone, but rather to anticipate new sources of added value to consumers.

Articulating Irish differentiation is critical – and this answer is rooted in the core truth of **naturalness**: That we are an island of natural food specialists; that we are an island of naturally engaged and imaginative people; that our island on the rocky outskirts of Europe is blessed with a naturally temperate and verdant climate; that the excellence of our produce comes directly from nature and that nature is protected over the long-term through our commitment to sustainability.

At a functional level Irish food delivers natural nutrition, responsibly. At an emotional level we deliver natural enjoyment, through taste. These are the building blocks of **Food Brand Ireland** powered by Origin Green.

Digital is disrupting traditional business models and will continue to do so over the next ten years. **In our smart differentiation, Bord Bia leads the move to digitisation.** Bord Bia will support the industry to adapt for success through omni-channel customer engagement, changing supplier platforms and shortened innovation cycles.

Bord Bia is encouraged by the innovation opportunity which may arise from Ireland being the European hub of big tech presence, which suggests opportunity for us to work with our influential global neighbours.

ACTIONS

1. **Continue to deliver world class digitised marketing to drive differentiation in prioritised markets.**
2. **Invest more in scalable marketing in targeted priority markets.**
3. **Build on and digitise our Food Brand Ireland assets through the supply chain.**
4. **Leverage 'big data' to better effect to inform more targeted marketing.**
5. **Ensure specialised skills in digitisation are at the centre of the Irish industry.**
6. **Equip clients through leading-edge supports, for example innovation, brand, insight and talent.**
7. **Inspire stakeholders to innovate against Food Brand Ireland powered by Origin Green.**

2.3.

Building Bord Bia's Strength In Sustainability

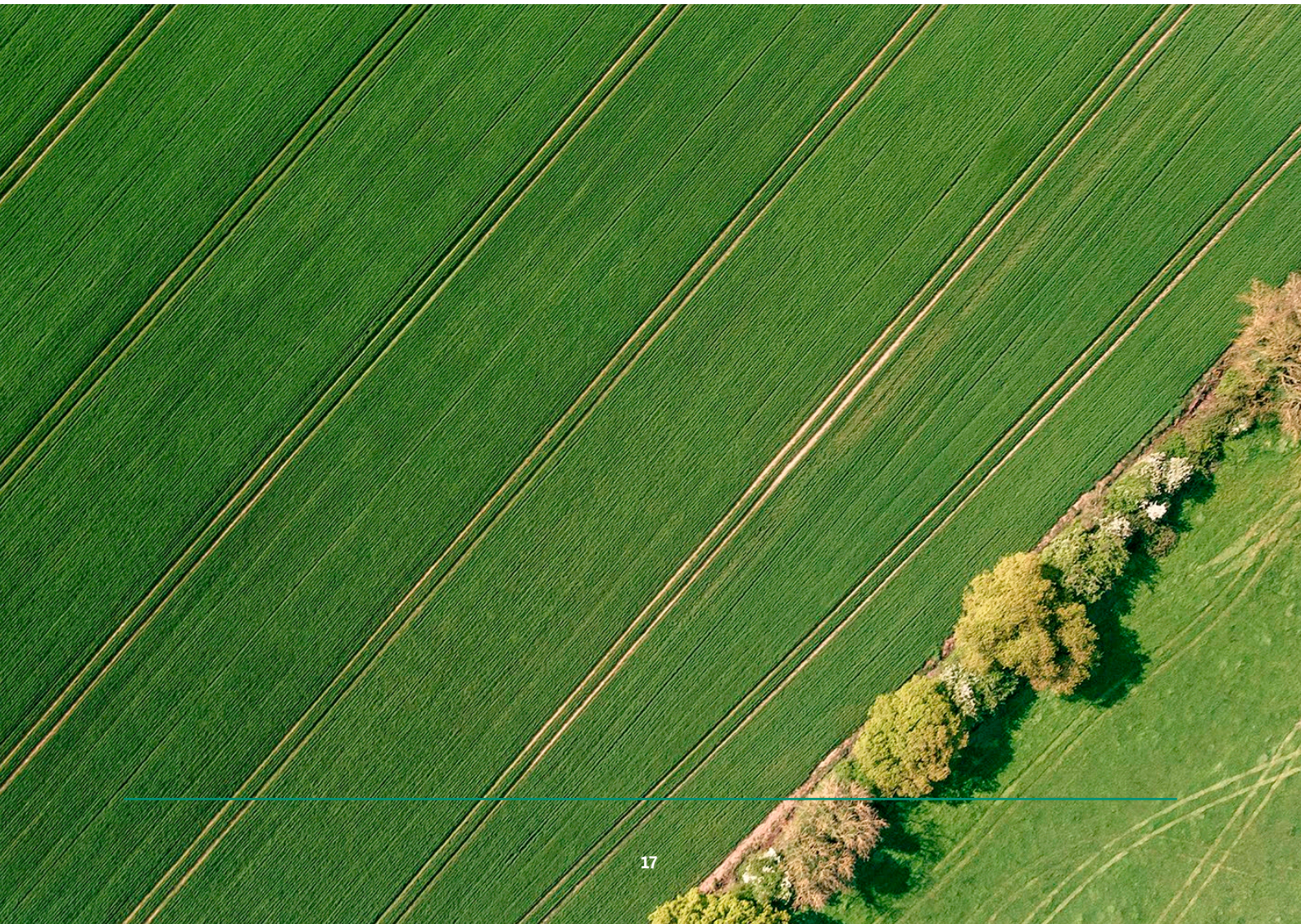
We enter a decade in which sustainability will become the defining issue from an ethical, economic and social viewpoint. What is right for the earth is right for its consumers, because healthy and resilient societies must give space to nature.

Aligned to the Department of Agriculture Food and the Marine's (DAFM) stakeholder-led Food Vision 2030 Strategy, Bord Bia has adopted a food systems approach which involves not just consideration of the issues affecting the sector but also the connections of the food system to people (nutrition and wellbeing) and the environment.

It is profitable throughout (economic sustainability);

It has broad-based benefits for society (social sustainability);

It has a positive or neutral impact on the natural environment (environmental sustainability).



Bord Bia sees sustainability as the defining theme within all Bord Bia will do during 2021-2031, underpinning Bord Bia's thinking, redefining how food is produced and how value is created.

Sustainably produced food and drink has its origins in the groundswell response to climate crisis – a journey which now demands that all actors in the value-chain meet and work together, including government, farmer, producer, manufacturer, trader, investor, retailer and consumer.

A sustainable system is composed of many layers which are fully inter-connected: health; economy; agriculture; societal systems, the organic food movement – all participating in a simple vision which asserts that less resources are used more fairly, and to better effect.

Ireland, by reputation, begins this new decade with a distinct advantage given our natural credentials, small population and geographic position on the northwest Atlantic. That Ireland is a sustainable food producer makes considerable intuitive and emotional sense to consumers around the world. Origin Green ensures that this perception is closely matched by the systemic reality of sustainability actions for credibility in world markets.

This decade will be a period of producing results. For Bord Bia, this means moving from a values-inspired, target-driven approach to sustainability in Origin Green, to a new conception of Origin Green (2.0) which delivers proof points, demonstrable change and becomes part of Ireland's leadership in sustainable food production on the world stage.

Such a stance implies collaborative, holistic thinking which is both challenging and imaginative across all activities.

The move to delivering demonstrable progress in delivery of this goal on sustainability is founded in four step-changes:

1. **A commitment to bolster biodiversity and nature-based solutions across the Irish landscape in order to conserve, enhance and restore habitats and practices that promote carbon and nutrient-rich healthy soils.**
2. **A specific, demonstrable pathway to Net Zero by 2050, which implies systemic changes in how we produce food across the supply chain over the coming decade to balanced baskets and sustainable nutrition for consumers - an end to end system.**
3. **Greater harnessing of the opportunities created through circular sustainability across the entire value-chain, for example, food waste and packaging footprint through collaboration with customers and industry partners.**
4. **A commitment to responsible and transparent supply chains, providing assurances to customers and consumers on provenance and practices.**
5. **An increased focus on the opportunity for organic food.**

Bord Bia sees its role as champion and as progress-maker, influencing Government and engaging all actors in the value-chain in the importance of sustainable change.

Farming and producers lie at the centre of this strategy, as we seek to achieve the most balanced yield from our landscape. This holistic, balanced and fair approach will inform our leadership in providing a wide range of foods to consumers.

Under Food Vision 2030, the recommendations in the "Review of Organic Food Sector and Strategy for its Development 2019-2025" should continue to be implemented and reviewed, including taking on board the new EU Organic Action Plan and its three axes of boosting consumption, increasing production, and improving the sustainability of the sector.

The role of horticulture is significant in the coming decade, in the context of the expanding plant protein movement which offers new dietary choices and has a justifiable, long-term role to play in addressing the sustainability agenda.

The coming decade will see Generation Z arrive into adulthood – the new producers and consumers of a new world steeped in awareness regarding the circularity of the earth's resources and the part that food, and they themselves, play in its destiny. Bord Bia will engage this fresh generation more wholly, more scientifically and more emotionally on the journey of sustainability. This is a unique educational opportunity of the coming decade, and one that Bord Bia will champion.

ACTIONS

1. **Continue to deliver new impacts and value creation from Origin Green for our stakeholders.**
2. **Build on data-capture and analytics infrastructure of Origin Green to support smart differentiation.**
3. **Continue to create customer and supplier partnerships driving preference for Origin Green verified exports.**
4. **Deliver new world-leading standards or proof points for Origin Green to secure our current position and capture value in the market through evidence based claims.**
5. **Further develop the infrastructure of Origin Green for future-proofing the industry for changing market or policy demands.**
6. **Drive scalable, sustainable innovation building on transparency across all our supply chains and agri-food marketing and promotion activities for all sectors to reflect Ireland's response to protection of biodiversity and the environment and a sustainable food system.**

2.4. Reinforcing Sustainable Nutrition

This decade is one of joined-up thinking in food production, where the primal benefits of food to people is recognised and acted upon.

The world's population demands affordable, nutritious food. Yet, nutrition has often been divorced from food for too long.

This core issue runs deep, rooted in a systemic approach to food which historically focused on product (the what) and less on benefit (the why). 2022 – 2032 will change the narrative, and Bord Bia will take an active role in that transformation.

At the heart of the journey to 're-find' nutrition within food is to acknowledge that all nutrients come from nature, derived from the interaction with fertile soil. Over time, food has sometimes become a bulk carrier of calories, divorced from its 'nutrients' which could be layered on artificially after-the-fact. This decade signals a return to the naturalness of nutrition in food, in a belief that the nutrition burden should be intrinsic and located in the soil.

Ireland is well positioned to bring leadership and focus to the meaning of nutrition in food, and its natural credentials are well-established. The next step is to substantiate and elucidate the meaning of nutrition in consumers' food by working with the relevant stakeholders to information on-pack is presented and explained, by moving the conversation to the meaning of food as it works for the body. Best practice is to enhance internal expertise and collaborate with independent nutrition specialists – shaping a new conversation together. This is what Bord Bia intends to do.

Nutrition is contextual, not absolute. Understanding how nutrients arrive into any individual body and become nutrition is an opportunity area that Bord Bia will explore with our collaborating partners.

One's nutritional needs change, for example, depending on age, gender, geography, lifestyle. Indeed, nutrition is ultimately highly personal. Technology is advancing to bring transparency and traceability from food right through to individual consumers. In this coming decade, data will be used to more perfectly match a consumer's nutritional needs and the food that they consume. This is a game-changing re-imagination of how food, drink and horticulture can actively bring functional benefits to people, and a source of value.

Nutrition is inter-related with the wider Bord Bia agenda which thinks both of person and planet. Bord Bia will reinforce the importance of trusted food sources, and the role of sustainability in making these choices.

ACTIONS

1. **Develop our organisational and industry expertise in sustainable nutrition.**
2. **Build on our partnerships with trade customers' and Irish suppliers on sustainable baskets initiatives to generate value.**
3. **Champion the nutrient density of Ireland's primary produce through innovation and education.**
4. **Collaborate with other nations to address the reputational and knowledge challenges our industry is facing.**

2.5. Optimising Re-Imagined Channels

The next decade will see a sea-change in how consumers meet with their food. By dint of Covid-19, many channels are already re-shaping, with blurred lines in an increasingly omni-channel environment. The structure of channels will become more complex with multiple layers which will make identifying decision makers more challenging.

Technology will be at the heart of future success as consumers adopt ordering, payment and delivery methods that are frictionless across retail and foodservice.

Our customers' business models will evolve to support that. Digitisation will accelerate the growth of the online channel providing opportunities for wider reach, while presenting challenges for companies and brands to stand out in a crowded space. Bord Bia will expand focus to channels other than traditional retail, with an emphasis on innovation to customers and their consumers.

These combined forces will create a requirement for a skills shift among food, drink and horticulture producers to confidently supply customers and position themselves as solution providers across channels. Bord Bia will and must be to the forefront in anticipating that new environment and enabling clients to thrive.

In retail, Bord Bia will pursue and optimise the opportunities that re-imagined retail offers through an increased emphasis on experiential, sensorial and theatrical, and utilise the channel as a complement to online for the industry. For Bord Bia the opportunity is to win in both of these domains by asserting a leadership role (using Ireland's signature imagination) in demonstrating what the new best in class looks like.

In foodservice, Bord Bia will equip client companies to cater for an increasingly health conscious consumer, looking to be excited through newness and convenience through off and on-premise offerings. As our customers' business models evolve to support a more complex multi-layered channel, Bord Bia will be at the forefront in providing partnership opportunities to maximise value capture, with technology at the core.

In manufacturing, Bord Bia will position our clients as solution providers to customers, providing a complete solution rather than selling commodity ingredients to the market. Bord Bia will explore niche areas that play to the unique strengths of Irish food drink and horticulture producers and build our differentiated proof points.

ACTIONS

1. **Future-proof our industry to thrive in an omni-channel world through foresight, insight and talent.**
2. **Build capability with clients to become leading sustainable partners across foodservice, manufacturing and retailing.**
3. **Transform our B2B strategy to further build lasting relationships with customers in priority markets.**
4. **Partner with priority customers on their channel and market innovation.**
5. **Build our differentiated proof points to protect value in an increasingly commoditised global marketplace.**
6. **Develop targeted B2B interventions through laser sharp focus on customer accounts.**



2.6. Fostering Holistic Collaboration

People lie at the heart of success supported by process, to deliver great products for world markets. A powerful play for Ireland is to build its strong food business relationships around the world collaborating with all the actors in the chain, from farm to fork, in a new way. It is a powerful idea.

Collaboration is an expression of a connected and holistic approach which is the signature of the coming decade. It starts with foresight and insight – as Bord Bia seeks to gain deeper understanding of people's needs and the role food plays in their lives. Foresight and insight collaborate with consumers themselves, and Bord Bia brings leading-edge expertise to listen more carefully and hear more expansively (functionally and emotionally) to their emerging needs.

The ultimate collaboration among people is expressed though culture itself – the manner and mode in which people around the world interact and live with each other, which sets up the codes and 'rules' for constructing meaning. This is the groundwork for the creation of value – from produce and brands. These collaborative techniques (sometimes called 'cultural insight' or 'semiotics') are a key way to collaborate in a non-linear, imaginative manner to build value.

Disruption and uncertainty necessitates collaboration in the market, and in our holistic approach, Bord Bia will seek to partner more with existing and new partners. Bord Bia will position Irish industry as solution providers, facilitating full value-chain traceability and transparency. Bord Bia will use our reputation and talents for bringing ideas, expertise and cultures together in new manners to advance our premium food, drink and horticulture agenda. Bord Bia will see beyond the typical value-chain, to new actors such as up-cyclers and recyclers; acknowledging the core role of farmers and producers as empowered innovators, and not price-takers.

ACTIONS

1. **Continue to shape industry through foresight and leadership.**
2. **Inspire all stakeholders to contribute and co-deliver our reputation of Ireland on a world stage.**
3. **Bord Bia staff positioned as experts in cultural understanding to translate marketing opportunity to more effective value creation.**
4. **Create expertise in the organisation across the ten years to make us relevant in areas of commercialising sustainability, insight and foresight, and digitised marketing.**
5. **Define and formalise strategic partnerships and deeper relationships to holistically collaborate with our customers and other agencies.**
6. **Continue to work closely with our partner agency, Teagasc, on the Department of Agriculture Food and the Marine's (DAFM) response to climate change.**
7. **Continue to leverage the opportunities that EU promotional campaigns deliver.**

3 Year Strategy

BORD BIA
IRISH FOOD BOARD

3.1 Overview and Strategic Framework

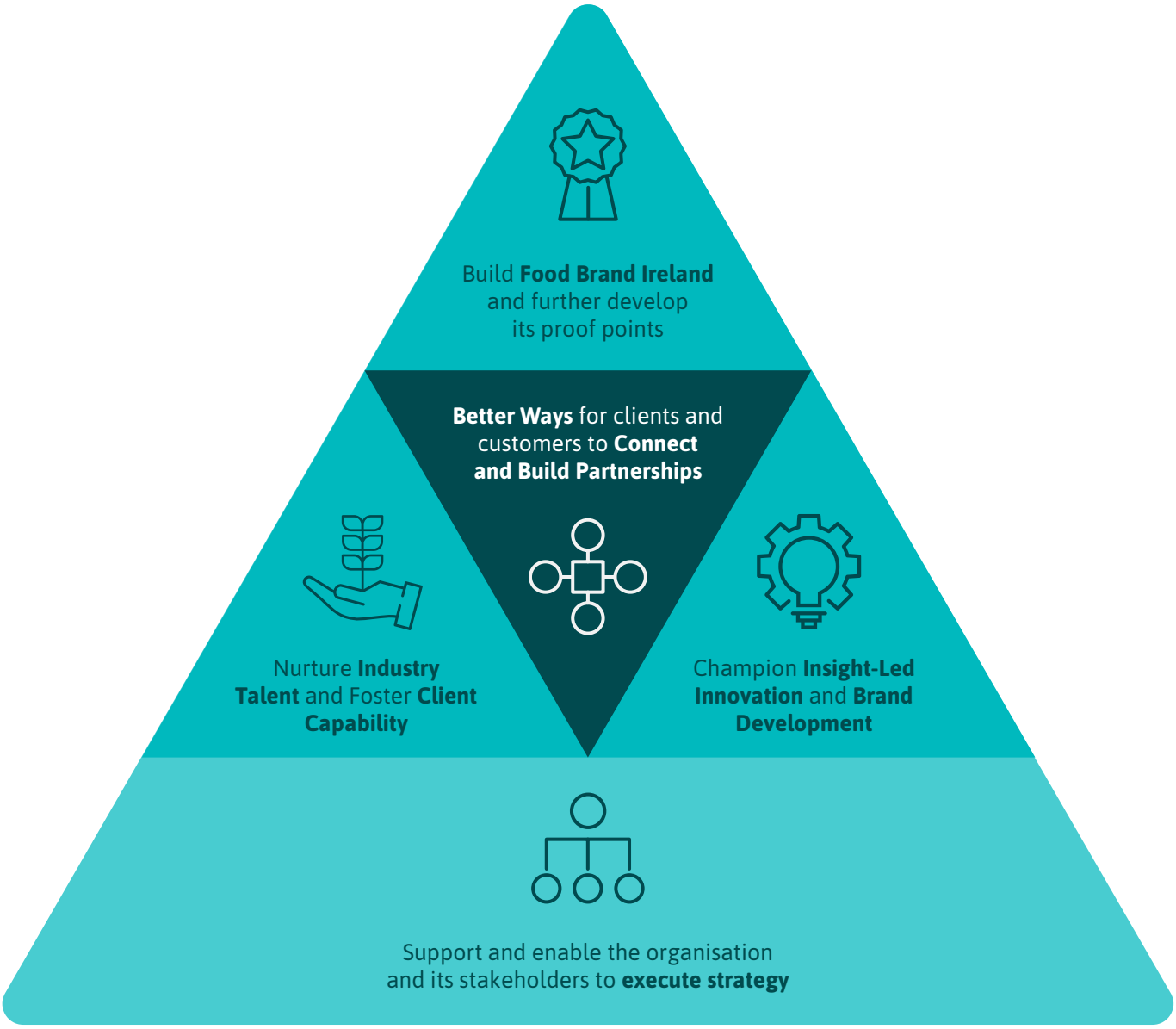
Our 10 year strategy outlines the key forces that Bord Bia will navigate in the years ahead. These forces are not insignificant, whether it be our ambition to build on our **strength in sustainability**, **reinforcing sustainable nutrition**, **fostering holistic collaboration**, **winning with smart differentiation** or the challenge of **optimising re-imagined channels**.

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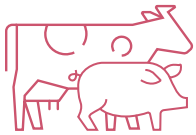
To achieve these ambitions Bord Bia has set-out over the next three years to achieve a number of 'jobs to be done'. Bord Bia calls these our "We Must Dos", five key ambitions for Bord Bia to deliver against in the medium term:



3.2. Bord Bia's Business Objectives 2022 — 2025

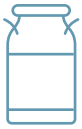
Meat and Livestock

To help defend and grow the value of the meat and livestock sector on the domestic and UK markets by €375 million or 11% by 2025.



Dairy

To help grow Irish dairy's value share of the Irish market by 2025 and help grow the value of Irish dairy exports by 10.5% or €508 million to a value of €5.6 billion through investment in market development in Africa, Asia, Europe, Middle East, North America and the UK.



Seafood

To help grow added value in and defend the seafood sector on the domestic market and grow the value of seafood exports by €44 million by 2025.



As value capture and creation is core to our strategy, developing business objectives for those growth ambitions in each sector is the starting point. Each sector faces a unique set of challenges that shape our thinking and the scale of our ambitions.

New trade deals in our biggest market, the UK, will undoubtedly influence the capacity for our meat and livestock sector to grow in that market. Declining birth-rates in China and an increased focus on plant alternatives in western markets shapes our thinking in dairy.

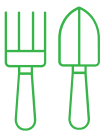
Our seafood sector will face a unique set of challenges around supply, while our horticulture sector may well see a dividend from consumers demanding more plant-based diets.

Our Prepared Consumer Foods (PCF) sector has the opportunity to grow value in European markets as the impact of Brexit takes hold. And our drinks sector will, hopefully, see a sea-change in its fortunes since the Covid-19 lockdowns stalled growth.

Our three-year strategy sets out our value growth ambitions in each sector as business objectives. These business objectives form the basis of our strategic plans for 2022–2025.

Horticulture

To grow the value of the horticulture sector (at farm gate) by €51 million to €521 million by 2025 with €43 million contributed from the Ireland market and €8 million from exports.



Drinks

To help grow added value in and defend the drinks sector on the domestic market and grow the value of drinks exports by €420 million by 2025.



Prepared Consumer Foods

To help grow added value in and defend the PCF sector on the domestic and UK market and grow the value of PCF exports by 14% to the value of €2.8 billion by 2025 in priority markets of EU, US and Middle East.



Organic

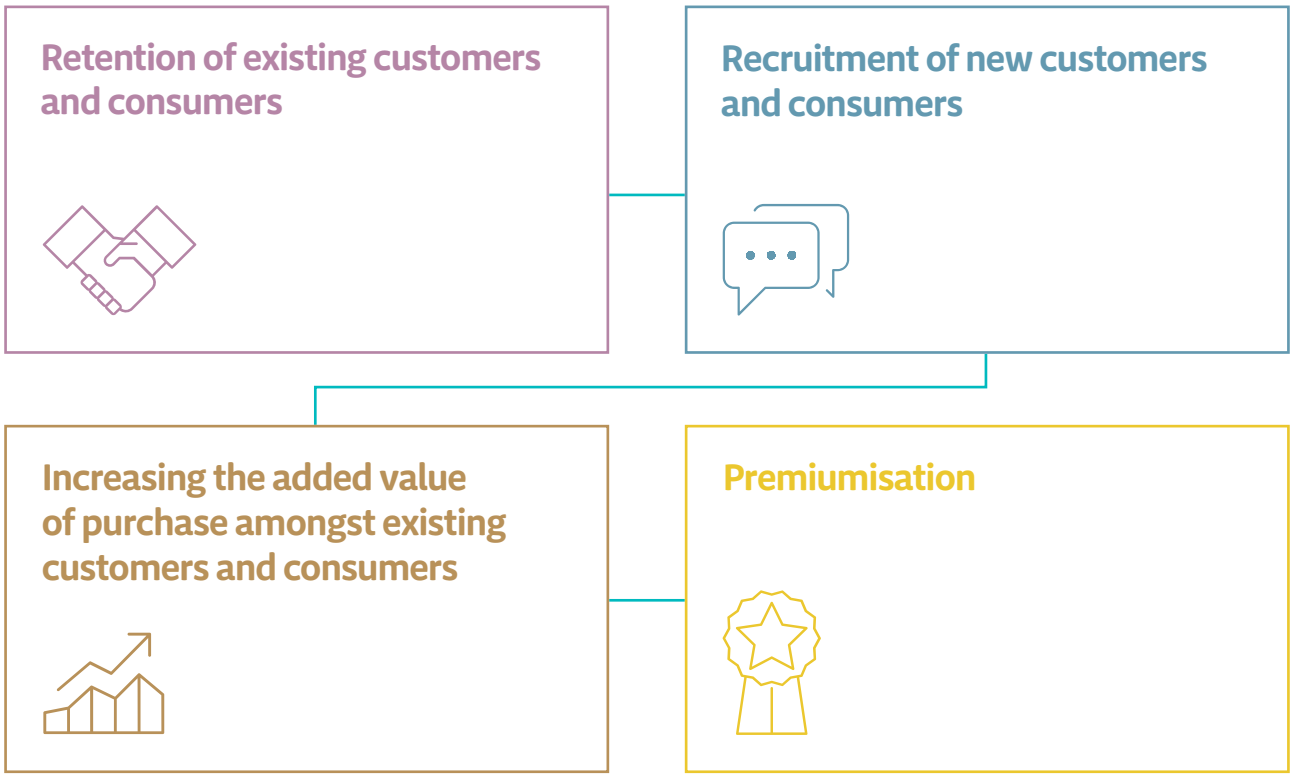
To help grow the value of the organic food sector by targeting specific opportunities for organic products on domestic and international markets, to support the Government's commitment to increase the utilisable agricultural area under organic production in Ireland to 7.5%.



3.3. Bord Bia's Core Strategic Questions 2022 — 2025



To deliver our objectives Bord Bia has set out a number of core strategic questions that Bord Bia will answer over the next three years. Bord Bia's thinking here is built around four potential levers of strategy that Bord Bia can influence, they are:



Bord Bia makes a significant distinction in our three-year strategy between consumers (the end user of a product) and customers (a potential trade purchaser). Our sector specific core strategic questions are detailed below.



Meat and Livestock

BORD BIA'S CORE STRATEGIC QUESTIONS 2022-2025

How will Bord Bia help **retain** €1.4 billion of business with trade customers across all meat in the UK and beef in France, Iberia and the Netherlands and help drive incremental growth to the value of €60 million through existing relationships?

How will Bord Bia **retain** sales of Irish meat to consumers in the domestic retail market and drive incremental growth of €35 million by 2025?

How will Bord Bia help **increase the value of purchase** from foodservice customers for Irish meat in the domestic market to the value of €25 million?

How will Bord Bia help **premiumise** Irish beef amongst consumers in the UK, Germany and Italy to deliver an increase of €50 million in beef exports by 2025?

How will Bord Bia help **increase the value of purchase** of Irish beef by existing customers in Europe (Italy, Netherlands, Central and Eastern European (CEE) foodservice, Germany, Nordics retail), Asia and North America to increase the value of exports by €80 million?

How will Bord Bia help **recruit** new trade customers of Irish beef and lamb in Asia (Japan, China) and North America, and Irish lamb in priority customers to increase the value of exports by €95 million?

How will Bord Bia help **increase the value of purchase** of Irish sheep meat with existing trade customers in the EU (France, Nordics, Belgium, Germany) and Switzerland, to the value of €20 million by 2025?

How will Bord Bia help **recruit** new customers for Irish pigmeat and poultry in Asia (China, Philippines, Vietnam, South Korea, Japan) and Mexico to the value of €28 million?

How will Bord Bia help **increase the value of purchase** of pigmeat and poultry with existing trade customers in China, Japan, the US, Australia and South Africa (poultry) to the value of €45 million?

How will Bord Bia help clients **recruit** new customers of live exports in the UK, Spain, Italy, North Africa, Middle East and Russia for older cattle and grow the value of exports to these regions and help retain €156 million in existing business?

Dairy

BORD BIA'S CORE STRATEGIC QUESTIONS 2022-2025

How will Bord Bia help **retain** €4.1 billion of existing business with trade customers in priority markets: Europe (Germany, Netherlands, UK), US, China, Japan and grow potential markets in West Africa, the Middle East (UAE, KSA) and deliver incremental value of €160 million?

How will Bord Bia **premiumise** Irish dairy ingredients to the value of €110 million by 2025 in China and South East Asia?

How will Bord Bia help **recruit** trade customers of Irish dairy ingredients in China, Vietnam, Thailand, Philippines, Singapore, Malaysia and India by the incremental value of €107 million by 2025?

How will Bord Bia help **increase the value of purchase** for Irish dairy amongst existing trade customers to the incremental value of €131 million in North Africa and Japan by 2025?

How will Bord Bia help Irish dairy clients to **recruit** new consumers in the Irish market to grow their share by 5% by 2025?





Seafood

BORE BIA'S CORE STRATEGIC QUESTIONS 2022-2025

How will Bord Bia increase the value of purchase of Irish seafood amongst trade customers in France, Spain and China, to the value of €5 million by 2025?

How will Bord Bia premiumise organic Irish salmon and shellfish amongst consumers in France and Germany contributing €6 million by 2025?

How will Bord Bia recruit new customers for Irish seafood in China, Japan, Vietnam, Singapore, Slovakia, and Thailand to the value of €33 million?

How will Bord Bia increase the value of purchase amongst consumers in the domestic market, particularly under-utilised species (white-fish, crab) to the value of €7 million in retail by 2025?

Horticulture

BORD BIA'S CORE STRATEGIC QUESTIONS 2022-2025

How will Bord Bia **increase the value of purchase** of Irish fresh produce across consumers and customers in multiple channels on the domestic market that will create an additional value of €33 million at the farm gate by 2025?

How will Bord Bia **increase the value of purchase** of Irish grown plants amongst consumers and customers across multiple channels on the domestic market, that will create an additional value of €10 million at the farm gate by 2025?

How will Bord Bia **increase the value of purchase** of Irish fresh produce across customers and consumers in multiple channels in the UK market that will create an additional value of €6 million at the farm gate by 2025?

How will Bord Bia **recruit** new buyers in the UK markets for Irish amenity products that will deliver a farm gate value capture of €2 million by 2025?





Drinks

BORD BIA'S CORE STRATEGIC QUESTIONS 2022-2025

How will Bord Bia **increase the value of purchase** of Irish drinks amongst customers in the US, Canada and EU (Germany, CEE) and Russia by €350 million by 2025?

How will Bord Bia **recruit** new customers of Irish drinks in the US, Canada and the EU (Germany, CEE) and Russia to the value of €70 million by 2025?

How will Bord Bia **retain and recruit** customers for Irish craft beer and cider on the domestic market?

Prepared Consumer Foods

BORD BIA'S CORE STRATEGIC QUESTIONS 2022-2025

How will Bord Bia help PCF clients to **recruit** trade customers to deliver their multi-channel commercial ambitions in France, Germany, Netherlands, Switzerland, Spain and US to the value of €180 million by 2025?

How will Bord Bia help PCF clients to **retain** their current trade customers and business value (€1.7 billion) in the UK market?

How will Bord Bia help PCF clients to **recruit** trade customers to deliver their multi-channel commercial ambitions in the UK to the value of €170 million by 2025?

How will Bord Bia **increase the value of purchase** of Irish PCF by €100 million across all channels in the domestic market by 2025?















Organic

While the sectors and aligned ambition mentioned above include organic production within those sectors, given the ambition in the Programme for Government to align Ireland's organic land area with that of the current EU average and the commitment to focus on developing domestic and international organic markets, Bord Bia will

Deliver our actions under the Review of Organic Food Sector and Strategy for its Development 2019-2025 including the following for Market Identification and Activation:

- Creating a multi-annual marketing strategy plan to target specific opportunities for organic products on domestic and international markets.
- Promotion activities to increase consumer understanding of organic products, awareness of organic product availability and seasonality.

We Must Do 1

3.4. Build Food Brand Ireland and further develop its proof points

What is the Big Idea?

Bord Bia will deliver our Food Brand Ireland message at-scale through more unified cross-sectoral ‘umbrella’ campaigns.

Bord Bia must continue to build Food Brand Ireland – our reputation in the market, with customers and consumers alike – to deliver real smart differentiation for Ireland in our key markets.

Origin Green will be at the heart of this activity where Bord Bia continues to build our strengths in sustainability and develop new proof points to ensure differentiation in the marketplace.

Building trust through the Bord Bia Quality Mark and Sustainable Quality Assurance Schemes will continue to be a focus. But the next three-years will require Bord Bia to amplify the work that has been done on the Bord Bia Verified Grass Fed standard.

And, to ensure Bord Bia captures value and the premium our producers deserve, Bord Bia will continue to push Origin Green further with new proof points for our brand around sustainable nutrition, animal welfare and ethical production. Farmer and producer engagement will be critical to the delivery of this ambition and Bord Bia will work closely with our farming community to help navigate the challenges ahead.

Bord Bia's strategic ambition for the next 10 years is to capture value in the market through **Smart Differentiation**. Articulating Irish differentiation is critical – and this answer should be rooted in the core truth of **naturalness**. Food Brand Ireland is our vehicle to build the equity of Ireland's reputation in a coherent and connected way across sectors and markets. That equity must **Build On Our Strength In Sustainability** and begin to develop our **Sustainable Nutrition** benefits.

DELIVERABLES:

1. **Bord Bia will build a brand (Food Brand Ireland) that resonates with customers and create a set of market-led benefits that clients are actively using to generate greater value in 2022, 2023 and 2024.**
2. **Bord Bia will ensure that Origin Green supports the development of Ireland's sustainable food systems in line with market needs in 2022, 2023 and 2024.**
3. **Bord Bia will build farmer advocacy, in partnership with industry, for sustainable food systems in 2022, 2023 and 2024 by demonstrating and communicating how this work adds value.**

We Must Do 2

3.5. Better ways for Bord Bia's clients and customers to Connect and Build Partnerships

What is the Big Idea?

World class relationship marketing from Bord Bia will connect clients and customers better than ever before.

Covid-19 pandemic has accelerated change in the way Bord Bia's clients connect with their customers.

Bord Bia's 10-year strategy calls out our ambition in **optimising re-imagined channels** over the course of the next 10 years. Routes to market will change, our ability to reach customers in established and emerging markets has never been more important to our clients, particularly as face-to-face time with customers becomes increasingly limited.

As our clients seek to engage effectively with customers they will face even greater competition than ever before. New communications platforms, beyond the traditional trade shows or buyer meetings, open up opportunities for competitors to engage with customers in ways that we may not have imagined prior to March 2020. Bord Bia will deliver on **smart differentiation** for our clients by building Food Brand Ireland through even **better ways of connecting**.

The ultimate ambition for some customers-client connections may be a **strategic partnership**. However, Bord Bia can deliver most **value** through a truly planful approach to relationship marketing that will truly differentiate our industry from our competitors.

DELIVERABLES:

1. **Develop, test and deliver a transformative relationship marketing plan across 2022, 2023 and 2024.**
2. **Develop and execute bigger and better opportunities through integrated client-customer plans by the end of 2022.**
3. **Develop and deliver an integrated content management plan by the end of 2022.**

We Must Do 3

3.6. Nurture and Attract Industry Talent and Drive Client Capability

What is the Big Idea?

Bord Bia will translate capability in sustainability into value creation for the industry.

Bord Bia's 10-year Strategy outlines our ambition to foster holistic collaboration between Bord Bia's clients, their customers and Bord Bia's wider stakeholders to ultimately create and capture more value.

Nurturing and attracting industry talent is central to this ambition and Bord Bia will continue to invest in talent programmes.

In recent years Bord Bia has also begun to invest in client capability with a focus on commercial skills to create and capture value. Building a stronger link between our talent pipeline and our client capability work is central to delivery of this ambition, particularly as Bord Bia seeks to build on our strength in sustainability.

DELIVERABLES:

1. **Deliver client capability services that are built on the needs of the Irish food, drink and horticulture industry and that connect with industry talent programmes in 2022, 2023 and 2024.**
2. **Deliver a suite of industry talent programmes aligned to our ten and three year strategy in 2022, 2023 and 2024.**
3. **Collaborate to establish an executive education programme to build client knowledge on climate change and food sustainability at senior management and board level in 2022, 2023 and 2024.**

We Must Do 4

3.7. Champion Insight-Led Innovation and Brand Development

What is the Big Idea?

Bord Bia will influence and shape innovation at a national level through powerful insight and thought leadership on sustainable innovation.

Mission four of the Food Vision 2030 strategy sets out the ambition to build an innovative, competitive and resilient agri-food sector.

Bord Bia's 10-year strategy aligns to this mission by **fostering holistic collaboration**. Bord Bia's unique contribution, as the voice of the marketplace, is through an insight-led approach that will drive **thought leadership** with Bord Bia's food science partners.

With **value** creation and capture across the supply chain at the heart of Bord Bia's strategy, innovation, new products and premiumistaion will continue to be key. **Building on our strength in sustainability** will be a focus here too, as Bord Bia seeks to translate the work of Origin Green into future fit benefits for people and the planet.

Moving through the strategy Bord Bia, in close collaboration with partner agencies (Teagasc and Enterprise Ireland), will champion **sustainable innovation** through a co-ordinated sectoral approach.

DELIVERABLES:

1. **To shape the future innovation agenda at a national level through thought leadership grounded in consumer and market insight in 2022, 2023 and 2024.**
2. **To develop three innovation partnerships with the food science community in 2022, 2023 and 2024, supported by our new engagement with targeted non-food partnerships.**
3. **To complete insight-led innovation and brand development projects, aligned to our sector strategies, with 85 client companies annually in 2022, 2023 and 2024.**

We Must Do 5

3.8. Support and enable the organisation and its stakeholders to execute strategy.

What is the Big Idea?

Bord Bia executes its strategy as One Bord Bia to deliver cross-sectoral impact that allows us to punch above our weight.

As part of our 10-year strategy, Bord Bia has identified fostering holistic collaboration as a value growth driver for the industry.

Collaboration between our staff through One Bord Bia is central to the successful delivery of our ambitions. And our focus, as a team, will be executing the strategy with excellence to deliver value back to our stakeholders. Bord Bia will support its staff on this journey.

DELIVERABLES:

1. **Attract and empower our people to execute strategy through performance development, transparent engagement and continuous learning and development in 2022, 2023 and 2024.**
2. **Our people will increasingly understand and uphold the One Bord Bia operating model and best practice corporate governance including budget management, finance, procurement procedures and adherence to State Aid rules in 2022, 2023 and 2024.**
3. **All of our people and stakeholders will be supported by best in class IT and infrastructure, in both physical and virtual work environments in 2022, 2023 and 2024, as measured through client and staff engagement surveys.**

Strategic Imperatives

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Bord Bia has identified two strategic imperatives that run across all five of the Bord Bia "We Must Dos". These are the unifying elements of the Bord Bia corporate strategy that will deliver on the One Bord Bia organisational transformation; digital transformation and Origin Green.

04

4.1. Digital Transformation Strategy

The Bord Bia "We Must Dos" demand that Bord Bia is the best, most agile, connected and learning organisation of its kind in the world of food, drink and horticulture. If Bord Bia is to realise the value Food Brand Ireland offers in smart differentiation, digital transformation is particularly essential. If Bord Bia is to generate more value in re-imagined channels, digital transformation is equally essential. Digitisation is a cornerstone for our ways of working and working lives, for how Bord Bia drives the reputation of Food Brand Ireland and how Bord Bia supports the food, drink and horticulture industry with expertise and services to facilitate added value.

Our ambitions require a strategic approach to digital transformation to deliver on our objectives. Over the next three years examples of transformative digitisation will come to the fore, including:

- Building a dynamic, personalised client journey
- Building new client-led products and services
- Building and embedding diverse digital capabilities to create organisational agility
- Unifying Bord Bia with seamless, standardised technology, for greater connectivity around data.

4.2. Origin Green Strategy

Each of our "We Must Dos" identify the pivotal role sustainability will play for Bord Bia in achieving our ambitions. If Bord Bia is to realise the value capture potential Food Brand Ireland can offer, building on the industry's strength in sustainability is essential. If Bord Bia is to capture value through insight-led innovation and brand development, reinforcing sustainable nutrition is essential.

Origin Green has been instrumental in monitoring and driving improvements in environmental sustainability and demonstrating this to trade customers and consumers both at home and abroad.

In line with Food Vision 2030, Origin Green now needs to require a higher level of ambition from participants to achieve 'stretch targets'. Ireland's agri-food sector will need to demonstrate validated performance around producing food with a low environmental footprint and Origin Green, with its 53,000 farms and 324 companies, has a critical role to play in this.

Vision

Origin Green is recognised as the world's leading national sustainability programme for supporting a climate neutral and nature positive food system that enhances wellbeing across the supply chain.

Purpose

To drive and monitor positive change across Ireland's food, drink and horticulture industry so we can continue to build and protect its global reputation for food sustainability.

Origin Green: Powered by Partnership

Taking the strategic direction of **fostering holistic collaboration,** the next phase in the evolution of Origin Green will reinforce a partnershipapproach.

On the production side our focus, in line with the move to sustainable food systems, will see Origin Green focus on delivering climate neutral and nature positive practices.

On the consumption side, a greater focus on unlocking value in **sustainable nutrition will be critical**; this focus will demand we continue to deliver superior food quality and better welfare standards. Bord Bia will continue to engage farmers with this work driving Ireland's credibility as a leader in food sustainability on the globalstage.



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