

# Ireland's Developing Organic Sector

## A Holistic Approach To Support Ireland's Growth Ambitions

**BORD BIA**  
IRISH FOOD BOARD

Emmet Doyle  
Organic Sector Manager





# Presentation Overview

1. Irish Agriculture Overview and Ireland's Focus on Exports
2. Irish Organic Sector Ambitions
3. Bord Bia Organic Activities
4. Q&A

**BORD BIA**  
IRISH FOOD BOARD



# Irish Agriculture Overview

**BORD BIA**  
IRISH FOOD BOARD

# Ireland's Grass Advantage:

Mild Temperature Climate

Annual rainfall 800-1200mm

## Grassland Area

Ireland	80%
Europe	40%

## Production (tDM/Ha)

Ireland	15
Europe	11



# Importance of Irish Agriculture

Ireland has 5 million people yet produces enough food to feed 35 million people each year

Irish Agri-food sector is Ireland's largest indigenous sector employing 10% of Ireland's working population

There are over 120,000 small family farms in Ireland



# €16.3 Billion

worth of Irish agri -food  
and drink exports in  
2023

65% of exports are  
meat & dairy



180 countries



€45 million  
a day

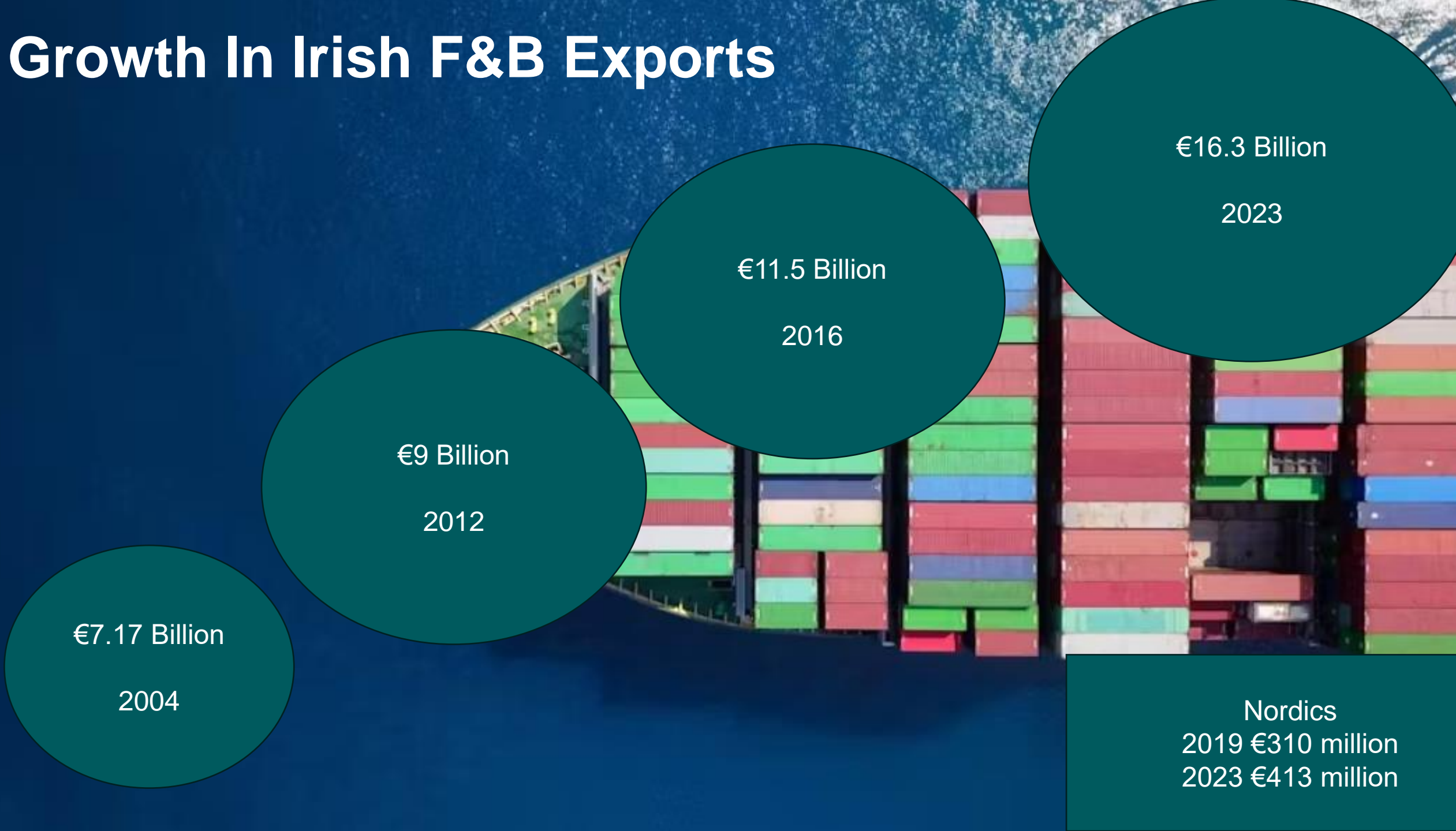


**Export 90%**  
Ireland exports about  
90% of its food and drink  
production.



**Exports are more  
than a quarter  
ahead of pre-  
pandemic levels**

# Growth In Irish F&B Exports



€7.17 Billion

2004

€9 Billion

2012

€11.5 Billion

2016

€16.3 Billion

2023

Nordics

2019 €310 million

2023 €413 million

# Bord Bia's Strategy



**Insights**

**Trade  
Network**

**Marketing  
& Promotion**

**Sustainability**

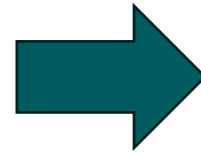


# Irish Organic Sector Ambitions

**BORD BIA**  
IRISH FOOD BOARD



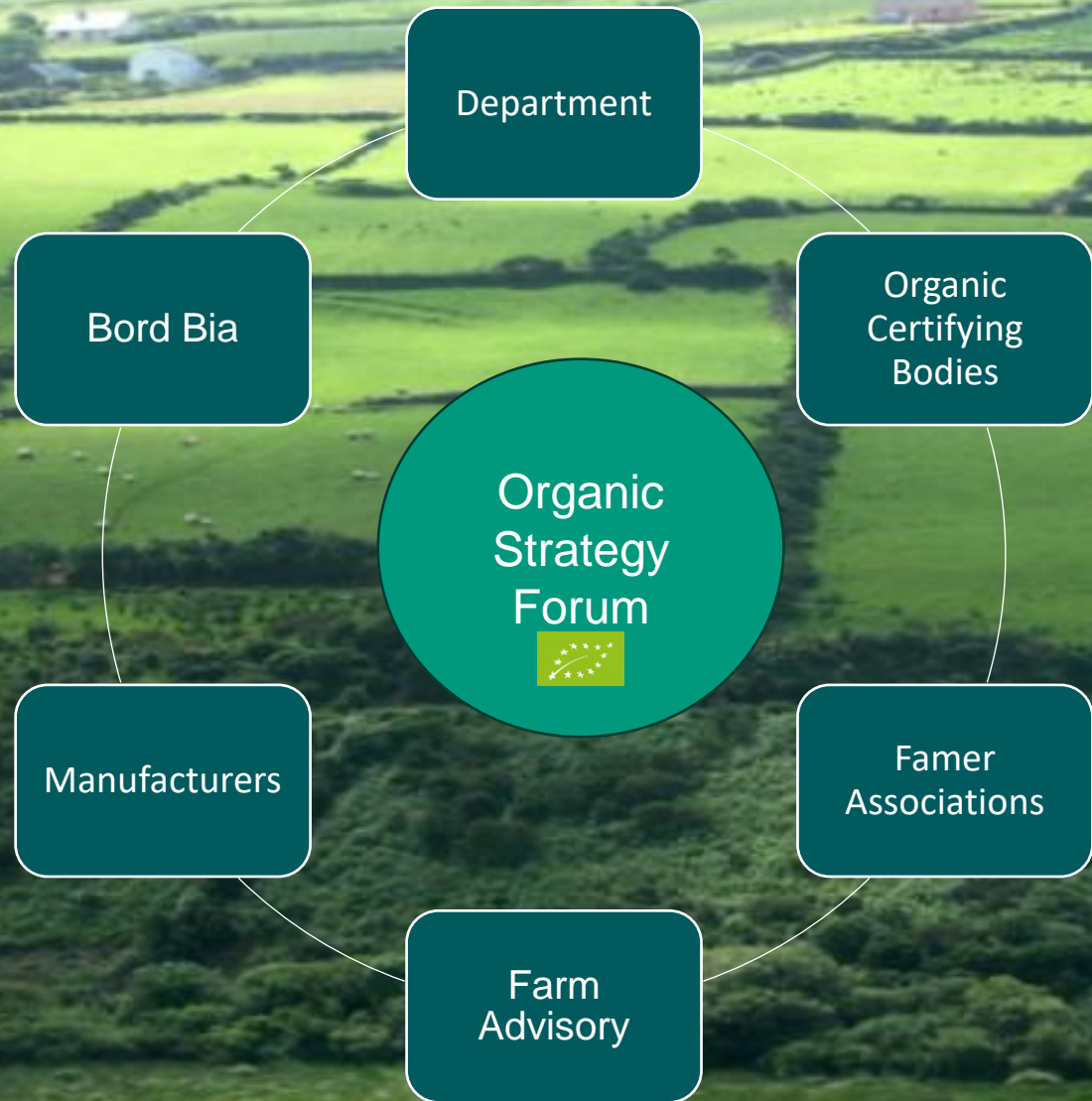
# Organic Momentum in Ireland



## 7.5% Target of Irish agriculture land to be farmed organically



# Organic Strategy Forum



**Tackle Sector Challenges**

**Encourage Collaboration**

**Bring a Strategic Focus to the Sector**



Rialtas na hÉireann  
Government of Ireland

## **CLIMATE ACTION PLAN 2023** **CAP23**

Changing Ireland for the Better

### **Increased Organic Funding & Focus**

€256m allocated to the Organic Sector in CAP 2023-2027

This is a five-fold, or 500%, increase compared to the budget for the previous scheme.

€57 million budget in 2024 (double previous 2023)

Approx 50% increase in CAP payment for the farmer

# 10%

**Target of Irish  
agriculture land to  
be farmed  
organically by 2030**





# Increase in Advisory Resources For Organic Farmers







# Organic Agricultural Land Use In Ireland

**2021**

**1.6%**

**2024**

**5%\***

**2030**

**10%**

\* Converted & in conversion



# Growth in Irish Organic Sector

**Irish Examiner**

## Over 2,000 new farmers confirmed for Organic Farming Scheme this year

This week they will receive their approval providing them with a five-year contract commencing on January 1, 2023.



Reaching 10% of all land farmed organically by 2030 is "hugely ambitious", but there is "real; progress" being made already, Ms Hackett said.

**Irish Independent**

## Over 1,000 farmers apply for Organic Farming Scheme in latest round



Minister of State Pippa Hackett.

## 2024 Organic Sector Snapshot

- 90% of new farmers are from livestock sector
- 5,000 farmers in the Organic Farming Scheme
- 2,750 organic beef farmers
- 1,750 organic sheep farmers

Organic Beef Production to Increase three fold  
Organic Lamb Production to increase five fold

85% of organic meat production to be exported

2023

2024



The image is a collage of food-related photographs. On the left, there's a wooden board with various cheeses, including a wedge of blue cheese and a large block of yellow cheese. In the top left, a bunch of dark grapes is visible. In the top right, there are several square crackers. On the right side, there's a close-up of a piece of salmon with a small white and purple flower garnish. At the bottom right, there's a close-up of a pile of golden-brown oat flakes.

## Export Focused Sectors

Organic Dairy, Seafood,  
Oats and Prepared Foods

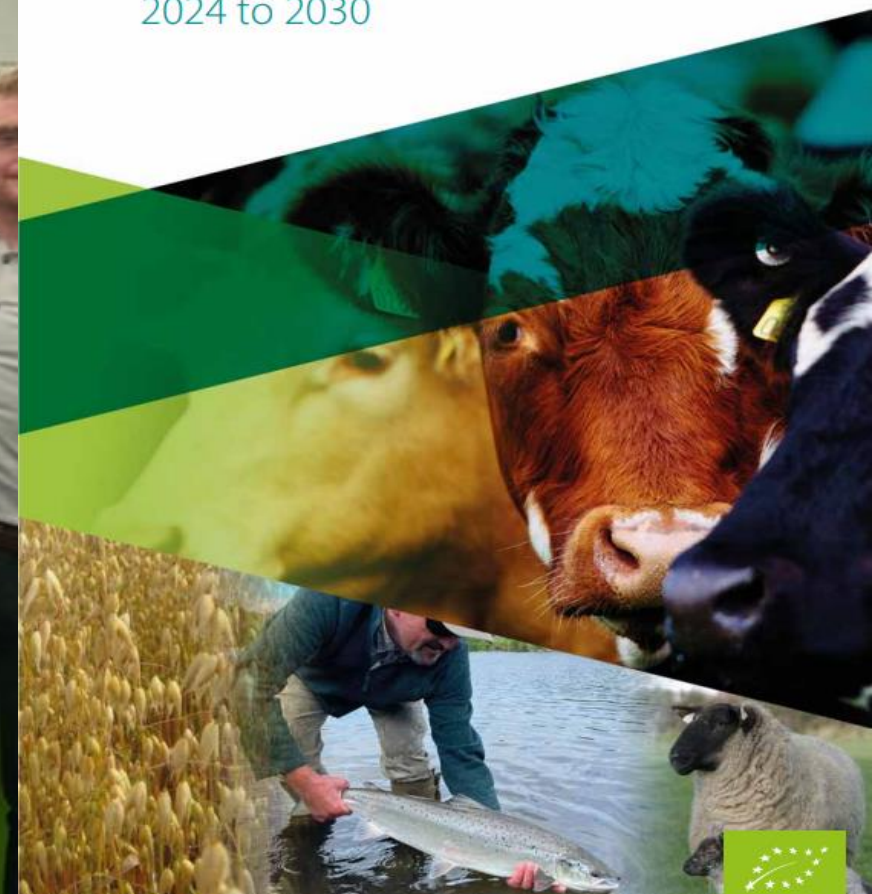
---





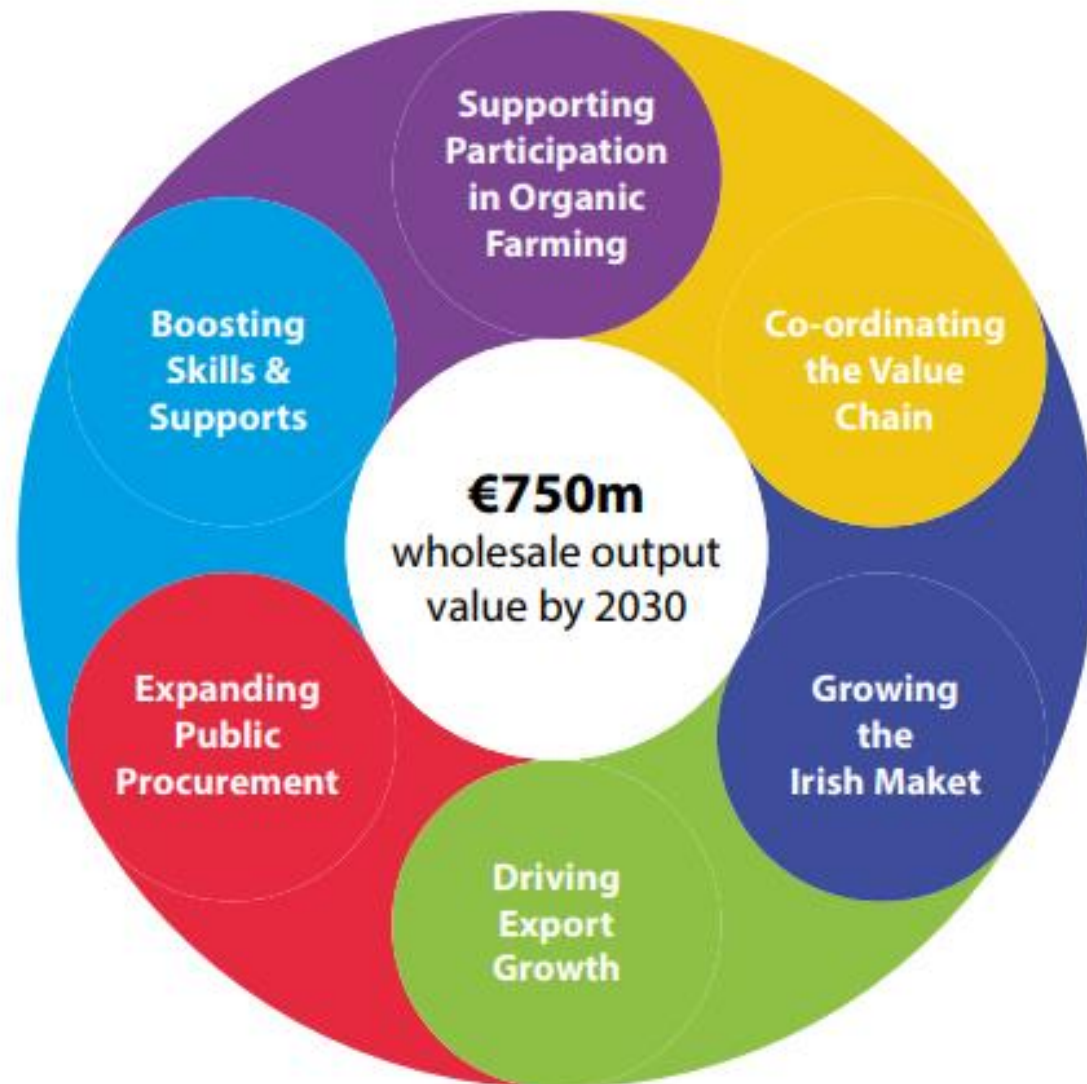
An Roinn Talmhaíochta,  
Bia agus Mara  
Department of Agriculture,  
Food and the Marine

## NATIONAL IRISH ORGANIC STRATEGY 2024 to 2030



# National Organic Strategy 2024-2030

# National Organic Strategy 2024-2030



## 1. Supporting Organic Farming Participation:

- Provide financial and technical assistance to encourage participation in organic farming.
- Facilitate access to land and resources for aspiring organic farmers.
- Implement initiatives to attract young farmers into the organic sector.



## 2. Coordinating the Value Chain:

- Strengthen connections between farmers and processors to streamline operations.
- Expand processing networks to accommodate the growing organic sector.
- Shorten supply chains to optimise efficiency.
- Increase distribution capacity to meet rising demand.



## 3. Growing the Domestic Market:

- Conduct market research to understand consumer preferences and needs.
- Clarify the benefits of organic food to consumers through targeted campaigns.
- Raise awareness and preference for Irish organic products among the domestic population.



## 4. Driving Export Growth:

- Gain insights into market trends to capitalise on export opportunities.
- Promote Irish organic food in international markets, leveraging its reputation for quality and safety.
- Highlight the environmental credentials of Irish organic food to appeal to eco-conscious consumers abroad.
- Support exporters in accessing new markets through trade agreements and initiatives.
- Explore the opportunities around labelling to maximise the visibility and credibility of Irish organic products in foreign markets.



## 5. Expanding Public Procurement:

- Support the new clear guidelines for green public procurement to prioritise organic products.
- Promote the availability and appeal of Irish organic produce in public institutions and facilities.



## 6. Boosting Skills and Support:

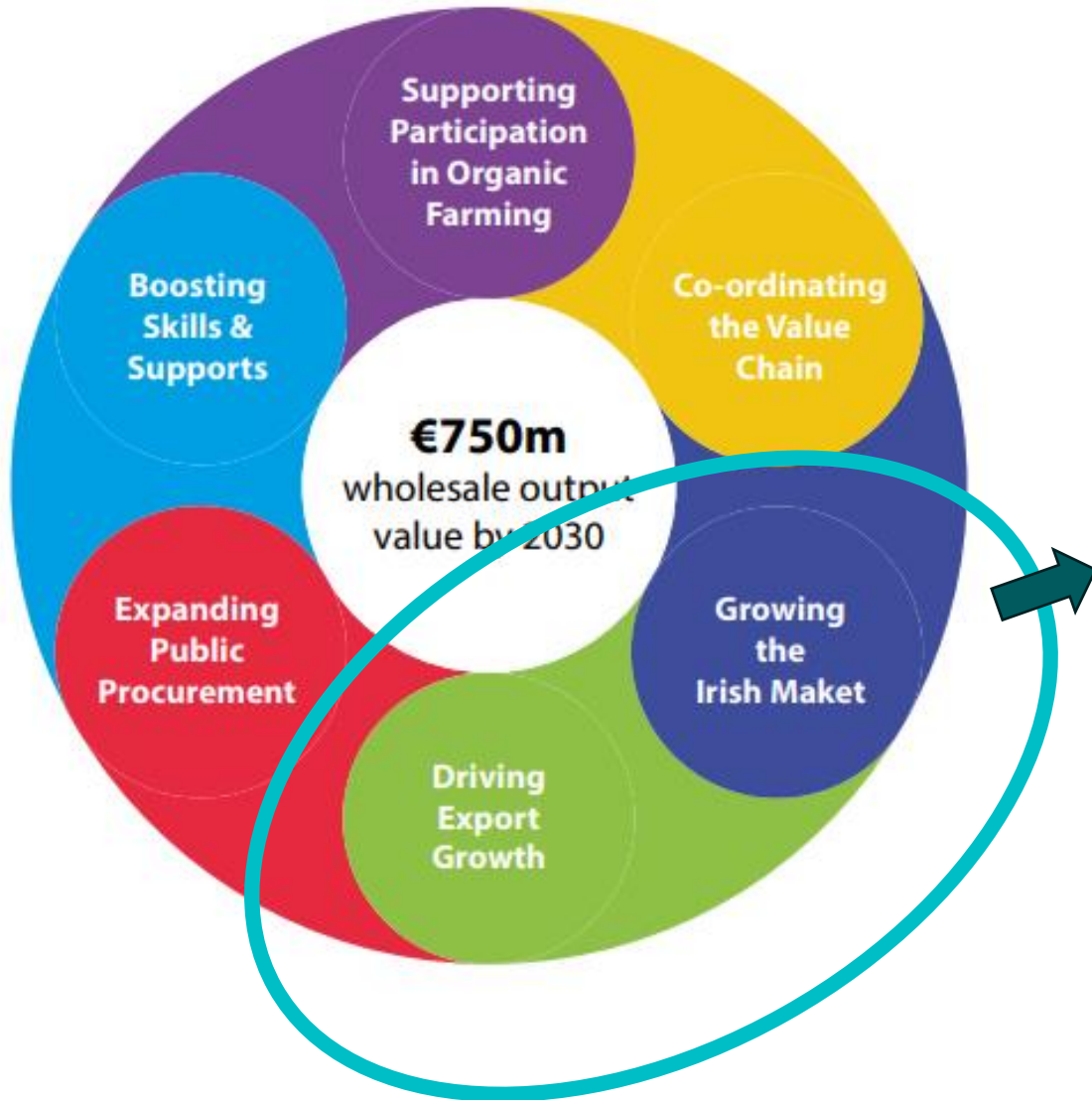
- Facilitate knowledge exchange among organic farmers to share best practices and innovations.
- Implement education and training programs to enhance skills and expertise in organic farming.
- Encourage research and development initiatives to drive innovation and sustainability in the organic sector.
- Foster collaboration among industry stakeholders to address common challenges and opportunities.
- Strengthen networking platforms to facilitate communication and cooperation within the organic sector.
- Enhance the business capability of the organic sector through capacity-building initiatives and support services.



# Bord Bia Organic Activities

**BORD BIA**  
IRISH FOOD BOARD





### 3. Growing the Domestic Market:

- Conduct market research to understand consumer preferences and needs.
- Clarify the benefits of organic food to consumers through targeted campaigns.
- Raise awareness and preference for Irish organic products among the domestic population.



### 4. Driving Export Growth:

- Gain insights into market trends to capitalise on export opportunities.
- Promote Irish organic food in international markets, leveraging its reputation for quality and safety.
- Highlight the environmental credentials of Irish organic food to appeal to eco-conscious consumers abroad.
- Support exporters in accessing new markets through trade agreements and initiatives.
- Explore the opportunities around labelling to maximise the visibility and credibility of Irish organic products in foreign markets.



**BORD BIA**  
IRISH FOOD BOARD



# Bord Bia Organic Department

Help deliver the future growth opportunities for Irish organic food and drink in both the domestic market and export markets



Champion Insight Led  
Innovation & Brand  
Development



Global Business  
Development Team



Dynamic Marketing &  
Promotion



Differentiation through  
Sustainability Proof Points

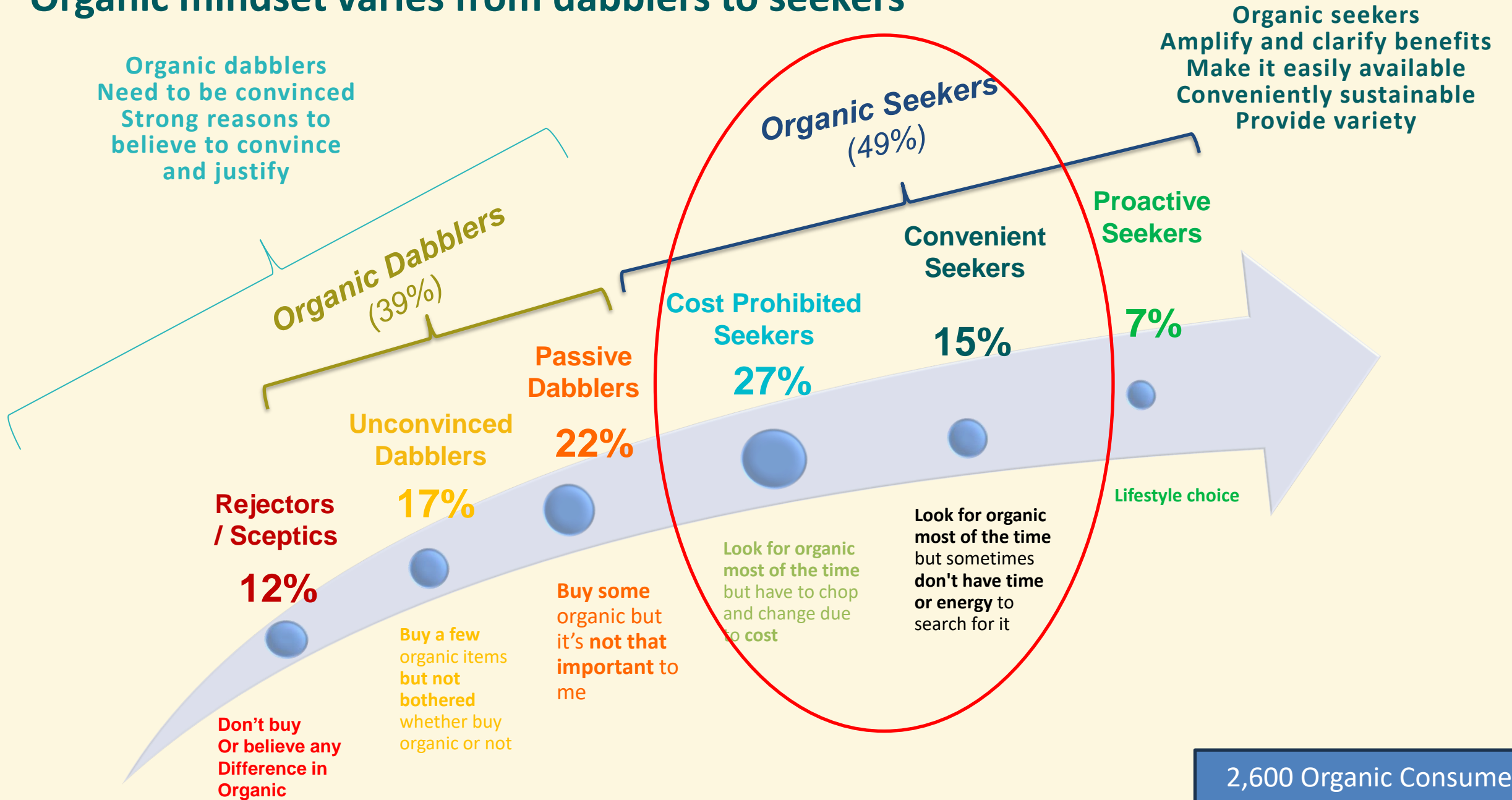


# Irish Market Consumer Campaign

**BORD BIA**  
IRISH FOOD BOARD



# Organic mindset varies from dabblers to seekers



# Behavioural change required for campaign success



THINK  
NOW

ORGANIC FOOD AND DRINK IS  
BETTER BUT SEEMS VERY  
EXPENSIVE.

THINK  
FUTURE

I UNDERSTAND WHY ORGANIC  
IRISH FOOD AND DRINK IS  
WORTH PAYING MORE FOR.

DO  
NOW

IN THE MAIN I STICK TO  
CONVENTIONAL FOOD AND  
DRINK.

DO  
FUTURE

I AM BUYING MORE OF IT,  
MORE OFTEN.

Clear endorsed  
facts or reasons to  
believe

That link back to  
the key consumer  
benefits

Justify the  
premium for  
organic



# Make your meals a little *more-ganic*

Certified Organic Food and Drink from Ireland. A Natural Choice.



**BORD BIA**  
IRISH FOOD BOARD



Learn more at [bordbia.ie/organic](http://bordbia.ie/organic)



Consciously reared.  
Carefully seared.



Make your meals a little *more-ganic*

**BORD BIA**  
IRISH FOOD BOARD

 Certified Organic Food  
Organic Irish Beef. A Natural Choice.  
Learn more at [bordbia.ie/organic](http://bordbia.ie/organic) 

Good for the soil.  
Good for the soul.



Make your meals  
a little *more-ganic*

**BORD BIA**  
IRISH FOOD BOARD

Certified Organic Food  
Organic Irish Fruit and Veg. A Natural Choice.  
Learn more at [bordbia.ie/organic](http://bordbia.ie/organic) 

Tenderly raised.  
Tenderly braised.



Make your meals a little *more-ganic*

**BORD BIA**  
IRISH FOOD BOARD

 Certified Organic Food  
Organic Irish Lamb. A Natural Choice.  
Learn more at [bordbia.ie/organic](http://bordbia.ie/organic) 





# New Dedicated Irish Organic Site on Bord Bia Website

## Certified Organic Food And Drink

[ABOUT THE CAMPAIGN](#)   [FAQ](#)   [CAMPAIGN CONTENT](#)



## Organic Food & Drink from Ireland

Certified Irish organic food and drink is renowned for its delicious taste and quality. Whether it is Irish organic beef burgers or an organic lamb leg, organic milk, yogurt, oats or eggs you can trust in the quality of Irish organic food and drink with the EU Organic logo.

[Learn more about organic](#)



**Good for the soil, Good for the soul**  
Make your meals a little more-ganic.



## Good for the Soil

Organic farming is based on taking care and nourishing the soil with only natural methods such as composts, manures and regular crop rotations. Healthy soils are the foundation of organic food production.

# Campaign Results – Marketing



15 Million Reach



1.2 Million Audio Listens



3.2 Million completed video views



400+ Billboards



# Increased Positive Perception of Irish Organic Food

	Total	Aware of campaign
Organic Irish food and drinks are better for our health than non-organic food and drinks	82%	88%
Organic Irish food and drinks always taste better than normal food and drink	74%	86%
Organic Irish food and drinks are better for environment than non-organic food and drinks	83%	89%
Organic Irish food and drinks have no pesticides or chemicals	83%	89%
Organic Irish food and drinks are better for animal welfare than non-organic food and drinks	81%	89%
Organic Irish food and drinks are better for the soil than non-organic food and drinks	83%	90%
Organic Irish vegetables are good for the soil	75%	84%

# Consumer Behaviour Impact



84% of shoppers would pay more for Irish organic food (+14%)

63% of shoppers actively looking for Irish organic food following seeing the campaign (+14%)

4 out of 10 shoppers claimed they bought more Irish organic food following seeing the campaign



# Export Markets

**BORD BIA**  
IRISH FOOD BOARD

# Export Market Focus



Identifying Export  
Market  
Opportunities

Build Trade  
Awareness &  
Lead Generation

Supporting  
Current  
International  
Customers

Exports will become more important for the Irish organic sector  
80%+ for organic meat; 90% for organic cheese & 50% organic oats



# Bord Bia Global Development Team



# Export Insights

**BORD BIA**  
IRISH FOOD BOARD



# Pan European Research



## Ph 1: EU Situation Analysis

Stakeholder  
Depths

**3**  
Topic Expert  
In-depths

Online  
Listening

**500 Million**  
Online Data  
Points Searched  
Daily

## Ph 2: B2B Customer Perspective

Customer + Expert In-depths

**20** Relevant buyers across  
multiples, discounters, Organic  
Specialist retailers and Foodservice  
Covering 7+markets.

## Ph 3: Consumers Perspective

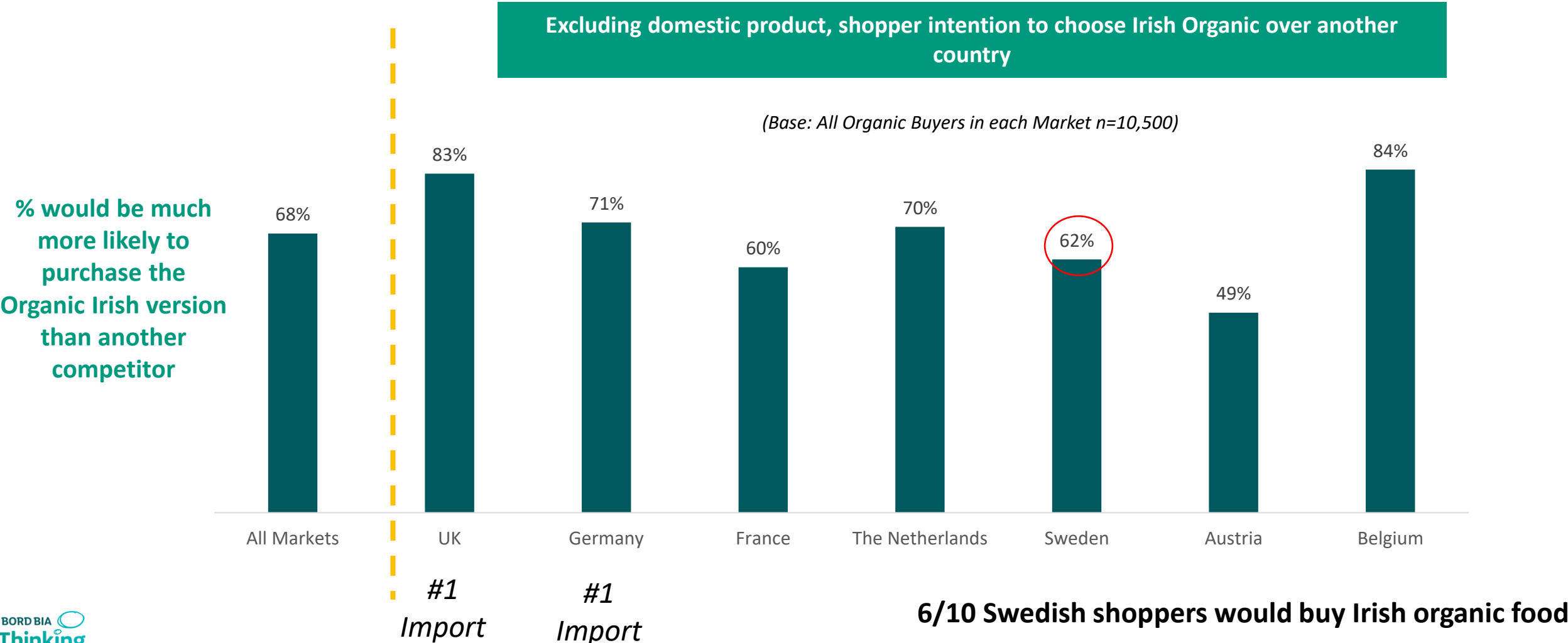
Consumer U&A  
Survey

**10,500**  
consumers  
across 7  
markets

Mobile  
Ethnography

**27** weeklong  
ethnography  
study across 3  
markets

# Very Strong Shopper Openness to Irish organic food and drink vs other importers





# Attitude towards Organic Purchasing – Segments

Largest segment amongst SE buyers is Cost Prohibited Seekers



## Pro – Active Seekers

23%

Organic is their Lifestyle choice

## Convenience Seekers

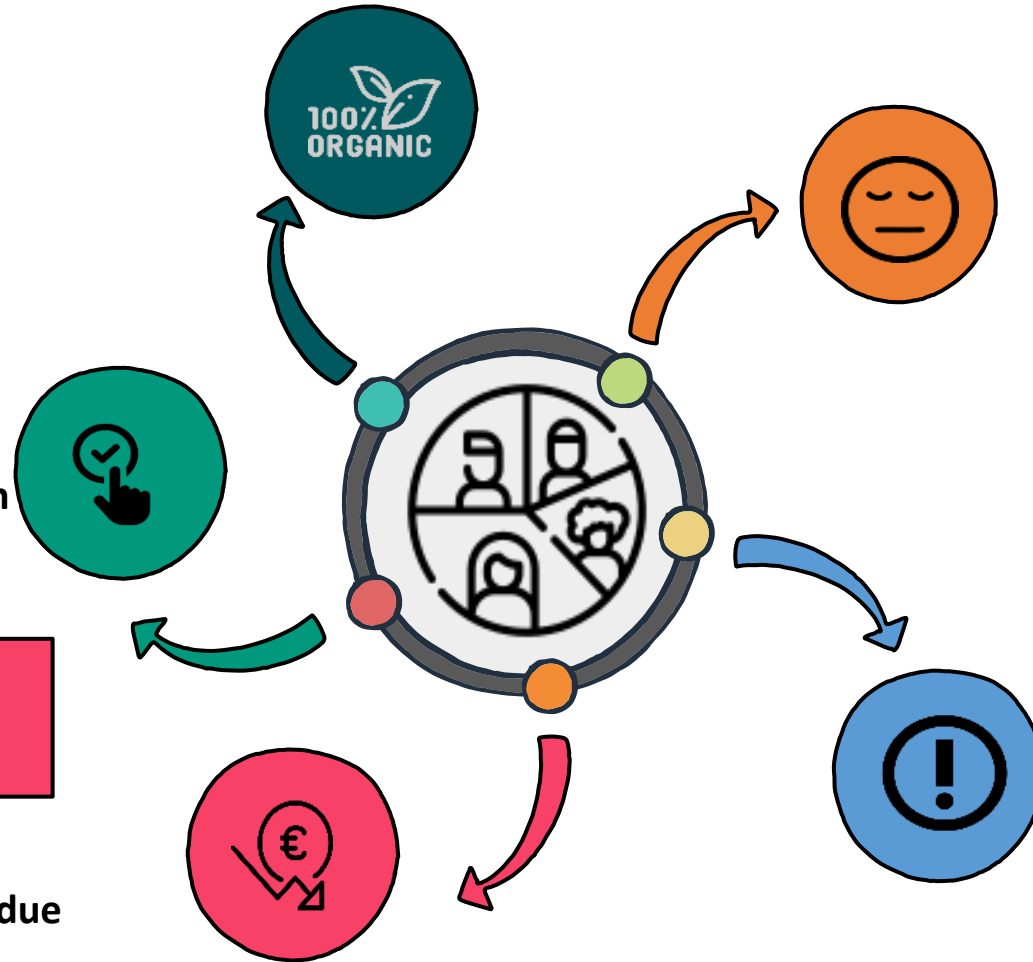
27%

Look for organic most of the time but sometimes don't have time or energy to search for it

## Cost-Prohibited Seekers

32%

Look for organic most of the time but have to chop and change due to cost



## Passive Dabblers

12%

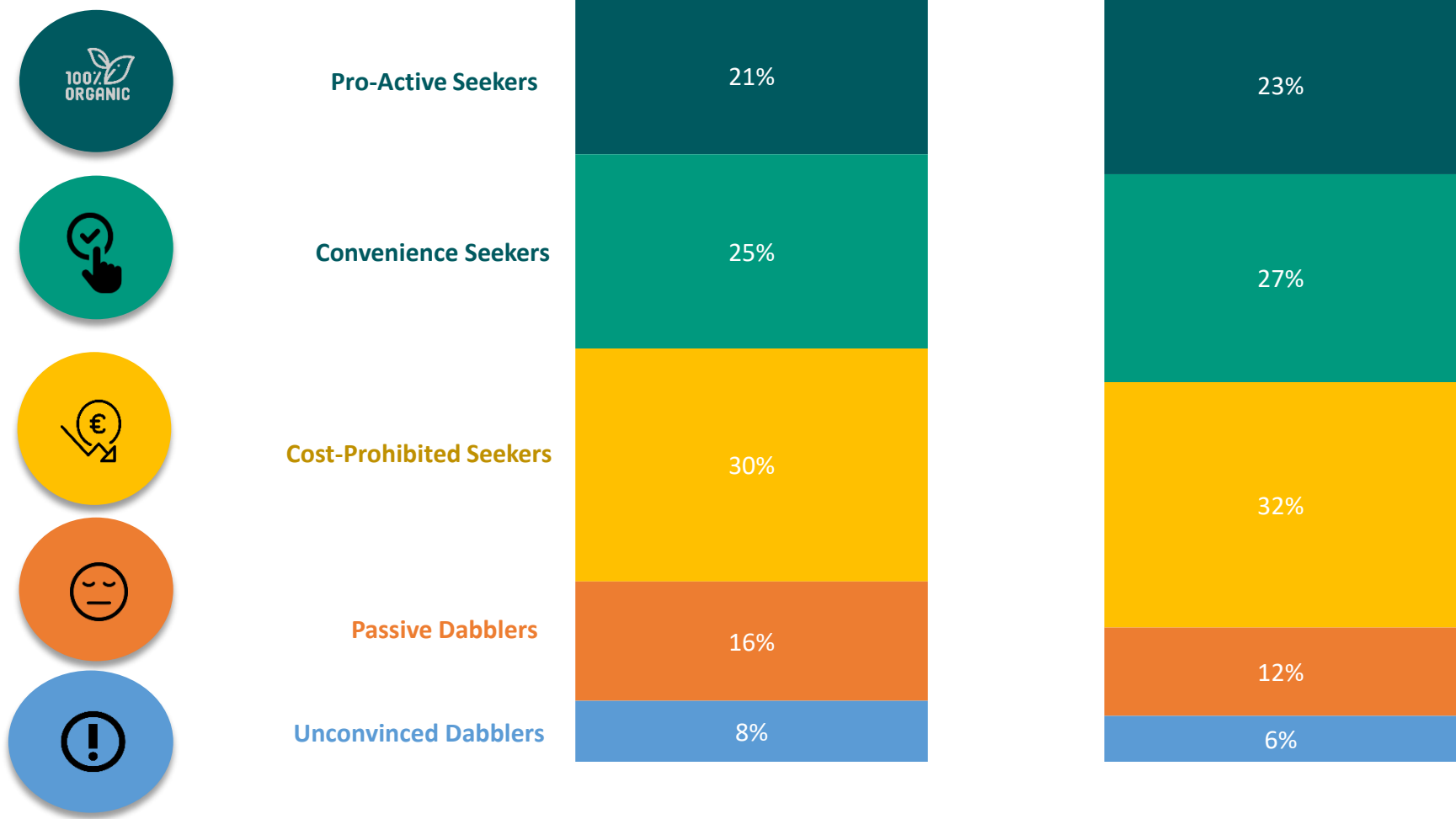
Buy some organic but it's not that important to me

## Unconvinced Dabblers

6%

Buy a few organic items but not bothered whether buy organic or not

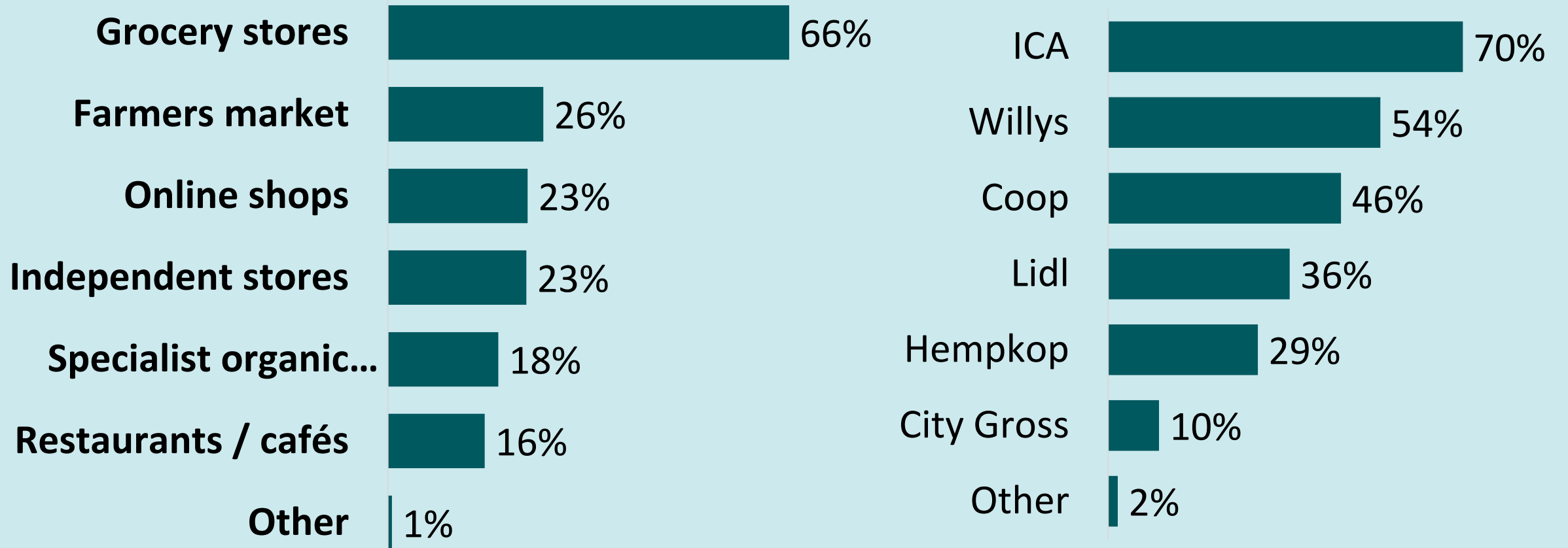
# Sweden over-index on Organic Active Seekers



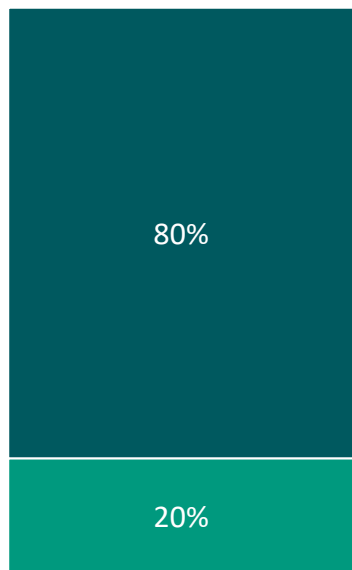
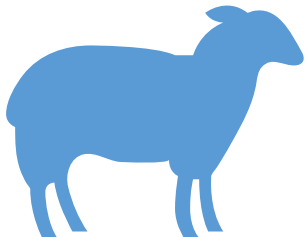




# Breakdown of Organic Sales in Sweden



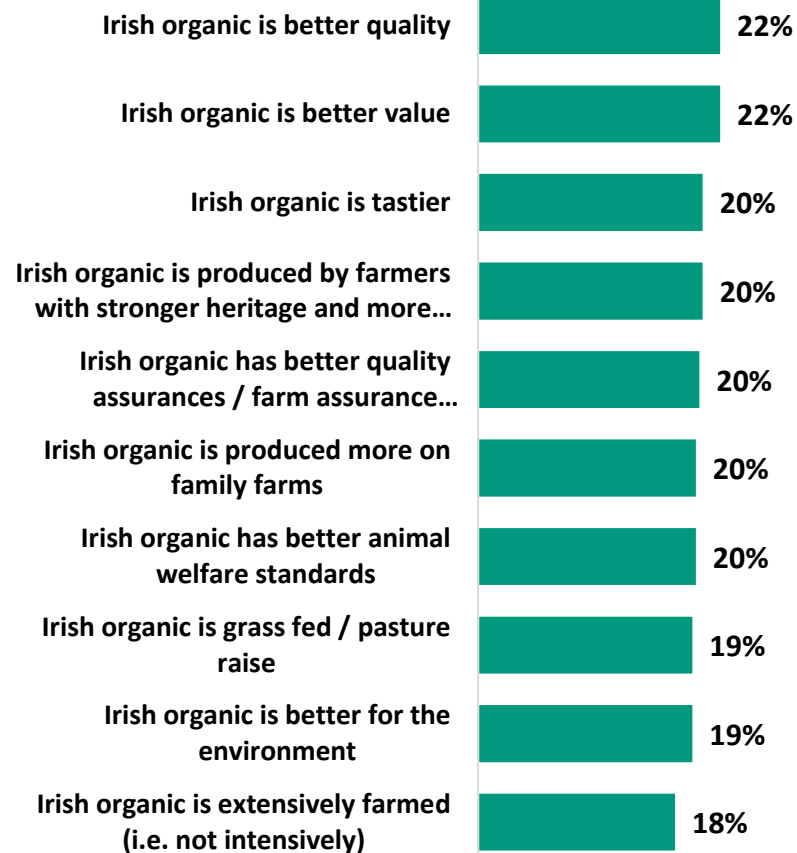
# Overview of Buying Behaviours



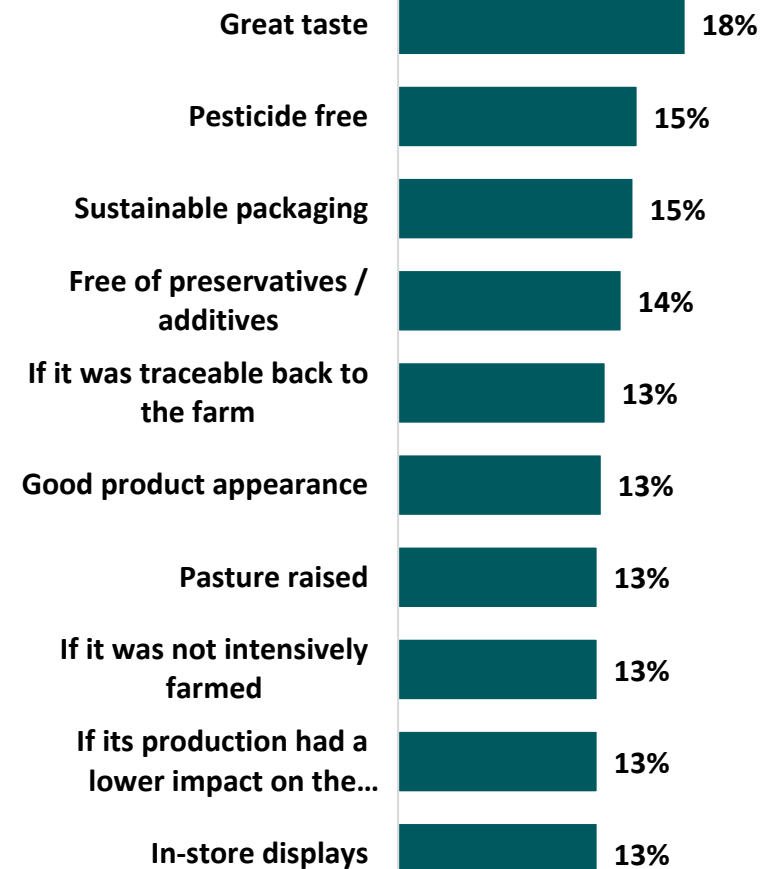
■ I would be much more likely to purchase a version from another country instead of an Irish version

■ I would be much more likely to purchase the Irish version

## Reasons for Purchasing Irish Versions of Organic Food & Drinks



## Key Features & Communications to drive Organic Irish Purchase in key Categories



# Export Marketing

**BORD BIA**  
IRISH FOOD BOARD



ENJOY  
IT'S FROM  
EUROPE



# EU ORGANIC BEEF & LAMB

PASTURE RAISED IN IRELAND 



Kofinanziert von der  
Europäischen Union

**BORD BIA**  
IRISH FOOD BOARD





# EU ORGANIC BEEF & LAMB

## PASTURE RAISED IN IRELAND



**3 Year Information & Education Trade Campaign**

**Meat Academy**

16 x In Market Events

*Education & Inspiration*

**Trade Shows**

Rolling Pin  
Bio Austria  
Nordics Organic Fair  
Natexpo

**Inward Visits**

12 x Inward Study Visits

*Seeing is Believing*

**B2B Marketing**

B2B Advertorials  
B2B Content  
New Website

# EU Organic Beef & Lamb Website



**EU ORGANIC  
BEEF & LAMB**  
PASTURE RAISED IN IRELAND

Ekologiskt nötkött ▾ Ekologiskt lamm ▾ Varför ekologiskt? ▾ Irland ▾

Publikationer ▾







Staff Training Academies



Inward Study Trips



Media Events







**Realities of an Inward Study Visit**





## Nordic Organic Food Fair



# RUNDSCHAU FÜR DEN LEBENSMITTELHANDEL



Von Mirko Jeschke | Fotos: Bord Bia/ Dublin

Der Start der von Bord Bia – der irischen Lebensmittelbehörde – kofinanzierten EU-Kampagne zur Förderung von Bio-Rind- und Lammfleisch in Deutschland ist erfolgreich verlaufen. Das Angebot zufolge fand die

**BIOLOGISCH RUNDVLEES UIT IERLAND**

Ons kwaliteitsrundvlees uit Ierland bevat het Beter Leven Keurmerk drie sterren, hiermee kies je bewust voor biologisch rundvlees. En de prijzen zijn vergelijkbaar met die van regulier rundvlees van andere supermarkten. Dit hebben we kunnen realiseren door de kosten voor het bereiden en verpakken zo laag mogelijk te houden in onze eigen slagerij.

**UITGEBREID ASSORTIMENT**  
Stoven met biologische sukadelappen, een biologische gehaktbal bij de stampot of een biologische biefstuk in roomboter gebakken... Bij Vomar heb je een ruime keuze in biologisch Iers rundvlees, gemaakt in eigen slagerij. Kies uit meer dan 12 soorten!

**Beter Leven 3 sterren**  
**QUALITY ASSURED SCOTLAND ORIGIN-IRELAND**  
AL ONS BIOLOGISCH RUNDVLEES KOMT UIT IERLAND EN BEVAT HET BETER LEVEN KEURMERK 3 STERREN

**BORD BIA IRISH FOOD BOARD**

**JOUW SUPERVOORDEELMARKT**

**Proef de buitengewone smaak van ons biologische rundvlees**

Ons biologische rundvlees komt van boerderijen waar veel liefde en aandacht voor de runderen is. Ze leven een koeienleven zoals de natuur het bedoeld heeft: ze lopen gemiddeld 220 dagen per jaar buiten heerlijk gras te grazen op uitgestrekte weides. Dit zorgt voor buitengewoon lekker rundvlees van hoge kwaliteit dat in harmonie met de natuur en volgens de hoogste biologische norm wordt geproduceerd. Zo proef je écht de smaak van de natuur. Ontdek ons verhaal op [IrishBeef.nl](http://IrishBeef.nl)

**BORD BIA IRISH FOOD BOARD**

[f](https://www.facebook.com/IrishBeef) [i](https://www.instagram.com/IrishBeef) [IrishBeef.nl](http://IrishBeef.nl)

**WIN A WEEKEND BREAK TO IRELAND**

BUY ANY SELECTED PACK OF QUALITY ASSURED OCADO ORGANIC BEEF STEAK AND YOU AND A FRIEND COULD WIN FLIGHTS TO IRELAND WITH A 2 NIGHT STAY IN BROOKLEDGE & MACREDDIN VILLAGE

**BORD BIA QUALITY ASSURED ORIGIN-IRELAND**

TERMS AND CONDITIONS APPLY

Customer & B2B Marketing

# Origin Green

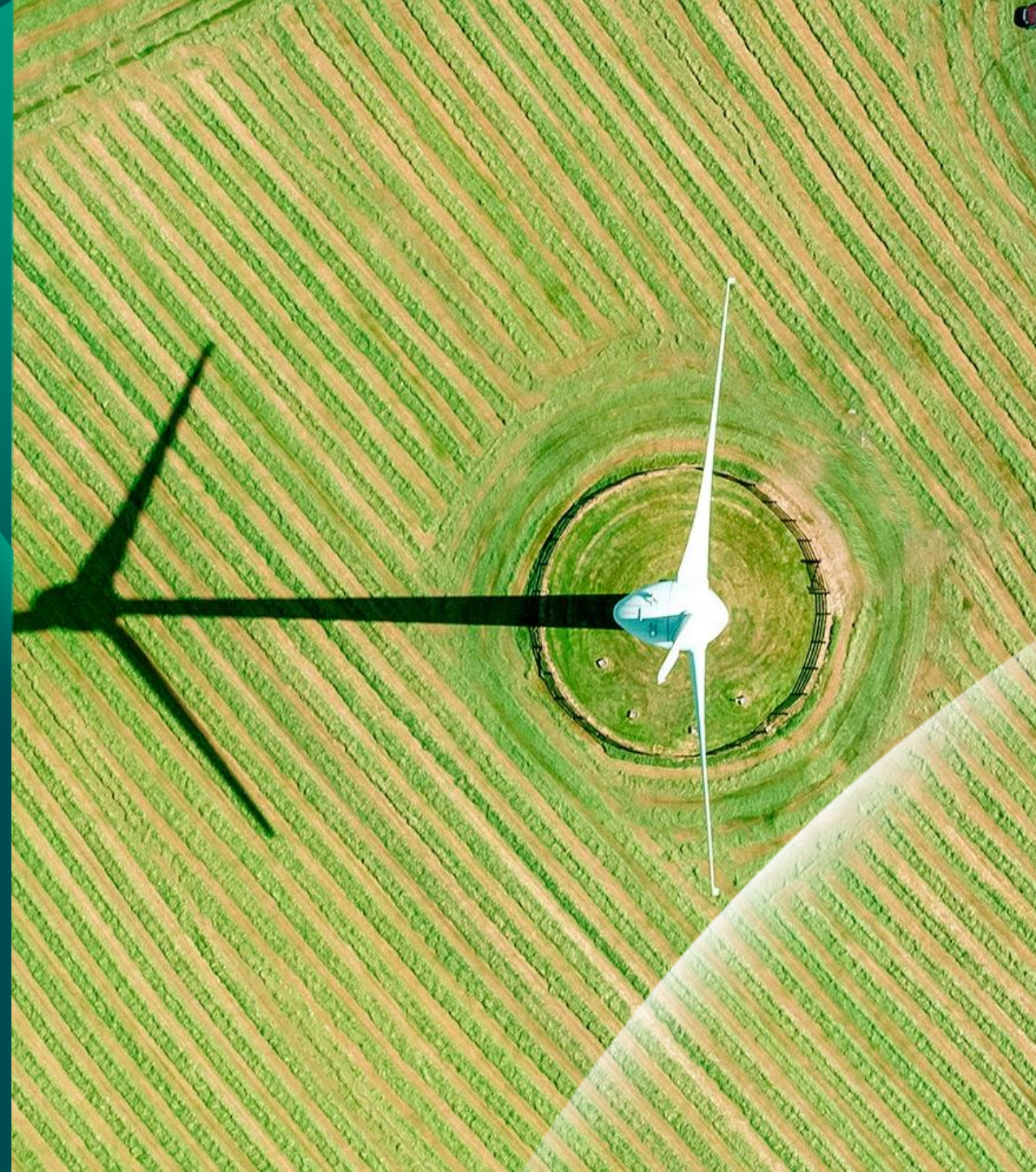
**BORD BIA**  
IRISH FOOD BOARD



# Origin Green



- Ireland's food and drink sustainability programme.
- The world's only national sustainability programme that spans the entire supply chain from farm to fork.
- Launched 2012
- Aligned to 15/17 UN SDGs
- Accredited to Carbon Trust







## SUPPLY CHAIN LEVEL



**FARM**



**MANUFACTURING**



**RETAIL & FOODSERVICE**

## METHODOLOGY

**ON FARM ASSESSMENTS**



**SUSTAINABILITY CHARTER**



**SUSTAINABILITY CHARTER**



## WHAT IS MEASURED?

- ENERGY
- EMISSIONS
- BIODIVERSITY
- WATER
- SOCIO-ECONOMIC
- TRACEABILITY
- WELFARE
- ANIMAL HEALTH
- FOOD SAFETY
- RAW MATERIAL SOURCING
- WASTE
- SOCIAL SUSTAINABILITY
- HEALTH & NUTRITION
- SUSTAINABLE SOURCING
- TRANSPORT



# Sustainable Assurance Schemes

Bord Bia's Sustainable Assurance Schemes for beef, lamb, dairy, horticulture and eggs. This infrastructure sees more than **100 auditors** undertake over **800 independent farm audits each week**.



# Origin Green Company Members



**Multi-Annual Sustainability Plan**



**Set 4-8 Sustainability Targets**



**Progress independently audited annually**

## Raw Material sourcing

- Supplier Certification
- Supplier Sustainability Initiatives
- Packaging

## Manufacturing

- Energy/ Emission
- Water
- Waste
- Biodiversity

## Social

- Community Initiatives
- Employee Wellbeing
- Health & Nutrition
- Diversity & Inclusion



# EU Certified Organic + Origin Green



<b>EU regulated organic standards</b>	✓
Launched in 2012, Origin Green is the <b><u>only national independently verified sustainability food program globally</u></b> by Mabbett, a leading inspection, testing, verification and certification body	✓
Origin Green is globally recognised through <b><u>ISO17065</u></b> international accreditation, The Carbon Trust and the UN Sustainable Development Goals	✓
Over 367,000 on farm <b><u>carbon foot printing</u></b> has been completed since 2012	✓
Origin Green provides a sustainability infrastructure to support customer's reporting of scope 3 emissions for organic beef, lamb and dairy sourced from Ireland. Carbon Footprint assessments are independently <b><u>accredited by the Carbon Trust</u></b> to its PAS 2050 Standard.	✓
Origin Green verified manufacturers have measurable and <b><u>tangible sustainability targets</u></b> through their Origin Green Charter for raw material sourcing and packaging, water and energy usage in processing, biodiversity and social sustainability initiatives (nutrition credentials, local community charities and diversity and inclusion)	✓

# Key Takeaways

Irish Organic  
Agriculture  
trebled since  
2021 - 2024

Export Markets  
will account for  
80%+ of organic  
meat, cheese &  
seafood  
production

EU Organic Beef  
& Lamb  
campaign will be  
leveraged to  
intensify export  
activities

Organic Strategy  
Forum & sector  
collaboration is  
key to growth

Market and  
consumer  
Insights critical to  
inform market  
opportunities &  
positioning

Origin Green  
sustainability  
programme is  
used to further  
differentiate Irish  
organic exports



# Thank You

**BORD BIA**  
IRISH FOOD BOARD

Emmet Doyle  
Organic Sector Manager

