



Irish Food in SE Asia

Ciaran Gallagher
Bord Bia SE Asia Director

Growing the success of Irish food & horticulture



Bord Bia
Irish Food Board

Bord Bia / Irish Food Board

...Irish Semi-State organization

Our Mission:

To drive, through market insight, and, in partnership with industry, the commercial success of a world-class food, drink and horticulture industry.



Our Purpose

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

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**STRATEGIC
PRIORITIES**

DIFFERENTIATED SUSTAINABLE GROWTH

Driving Success & Growth in the Market

*Laser focus on expert sector and channel management
which is a beacon for partners*

Insight to Power Growth

*Using insight to optimise a smart
decision-ready environment*

Leading through People

*Fostering an entrepreneurial culture
and skills*

Building Reputation for Growth

*Driving differentiation of food
brand Ireland*

€12.6bn

Irish food and drink exports are valued at €12.6bn, an increase of 13%



Growth of c. 60% since 2010 or €4.7bn

60% growth



€4bn

Export performance driven by a surge in dairy sales to over €4bn – comprising one third of all food and drink exports

32%

International markets account for 32% or €4bn

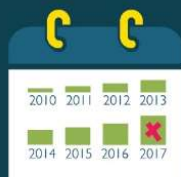
35%

35% of Irish food and drink exports are destined for the UK – down from 37% – to a value of €4.5bn



33%

Other EU markets account for 33% of exports or €4.1bn



8th

The 8th consecutive year of export growth in 2017



↑€4bn

Shipments of Irish food and drink to international markets grew by some 17% to €4bn



180

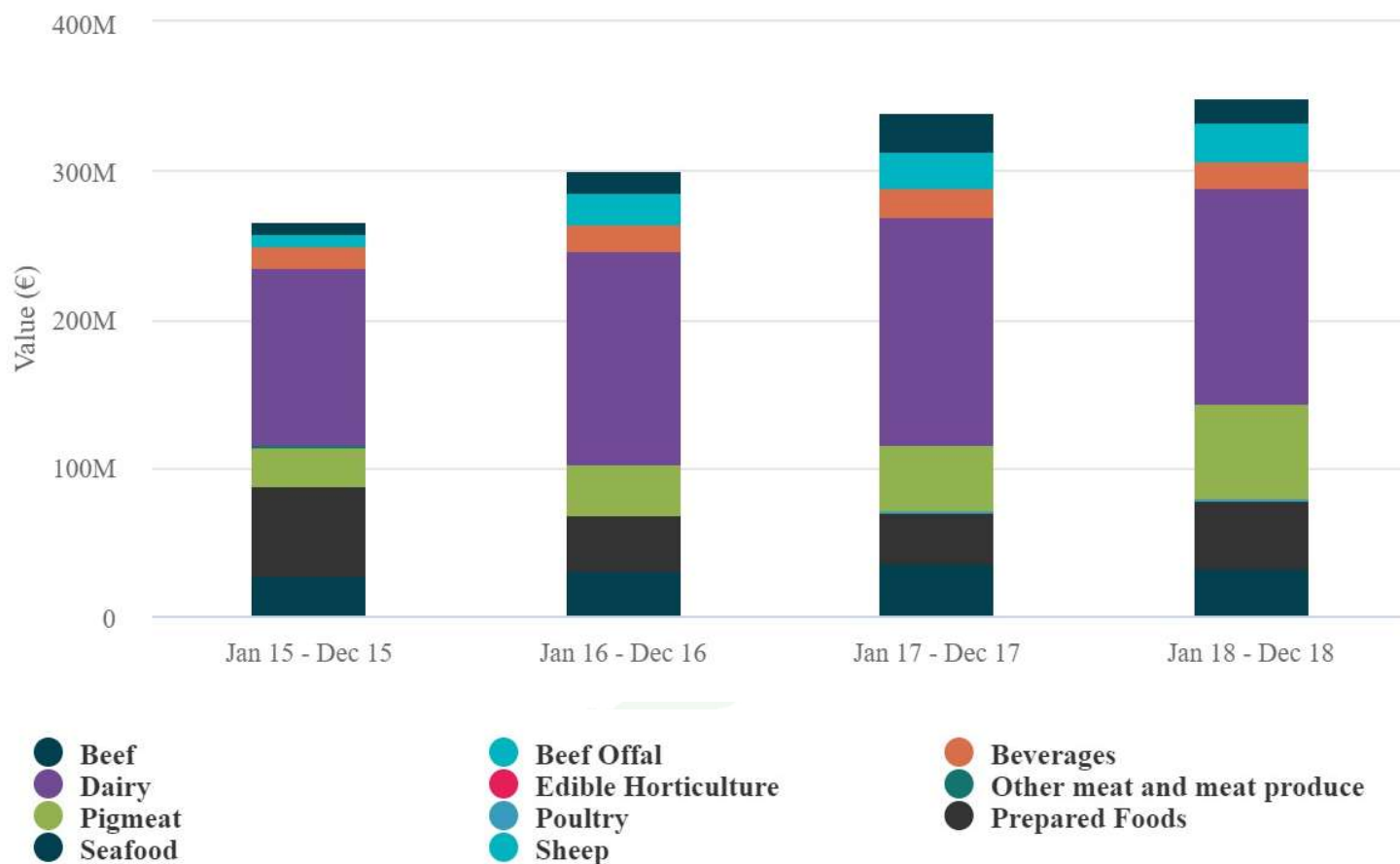
Irish food and drink is sold in 180 markets worldwide

Source: Bord Bia

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Bord Bia
Irish Food Board

Irish Food & Drink Exports to SE Asia, Japan & Korea



- 2018: €349.4 million

- Jan-Aug 2019: €269.4 million
 - 19% YoY increase

Key sectors:

- #1 sector: Dairy (42%, or 55% including Prepared Foods)
- #2 sector: Meat (28%)
- #3 sector: Seafood (10%)
- #4 sector: Beverages (5%)

Bord Bia in South East Asia, Japan & Korea



Ciaran Gallagher

Director, SE Asia,
Japan and Korea



Malcolm Leoi

Market Specialist
for Indonesia, Malaysia, Philippines,
Singapore, Thailand and Vietnam



Joe Moore

Market Specialist
for Japan and Korea

Bord Bia Marketing Fellowships *MSc degree programmes in collaboration with UCD Smurfit and Irish industry. In-market placement until Dec 2020*



Mairead Victory

Based in Singapore
on dairy, poultry, seafood
and beverages client
projects



Nghia Mai Thi

Based in HCMC on dairy,
meat and beverages client
projects and a Bord
Bia seafood project



Fintan Ryan

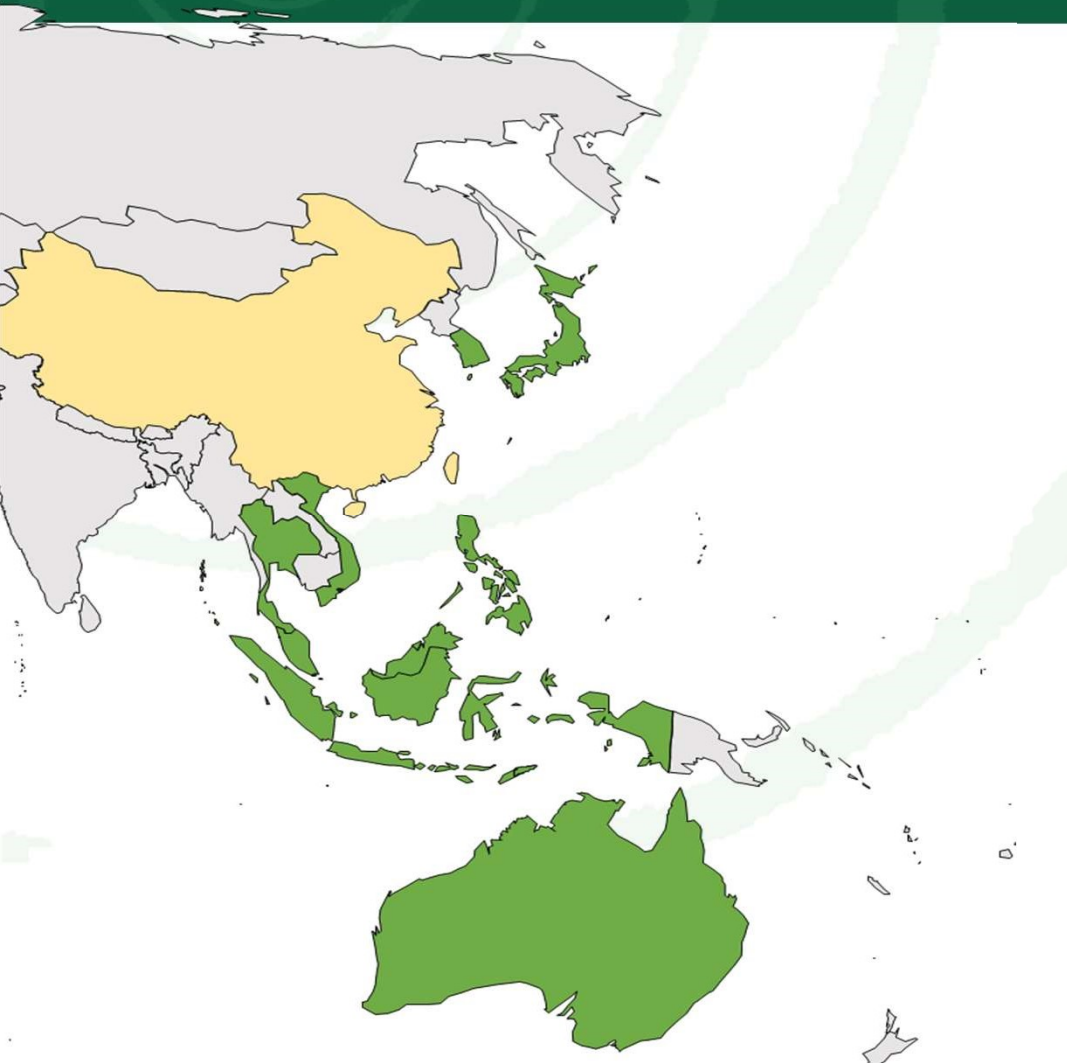
Based in Seoul on
dairy and meat client
projects and a Bord Bia
beverages project



Emmett Duffy

Based in Tokyo on dairy
and meat client projects
and a Bord Bia beverages
project

Bord Bia in South East Asia, Japan & Korea



Japan

South Korea

Singapore

Malaysia

Indonesia

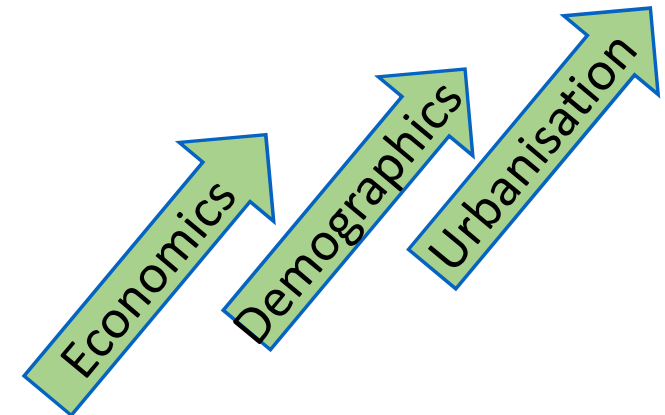
Philippines

Thailand

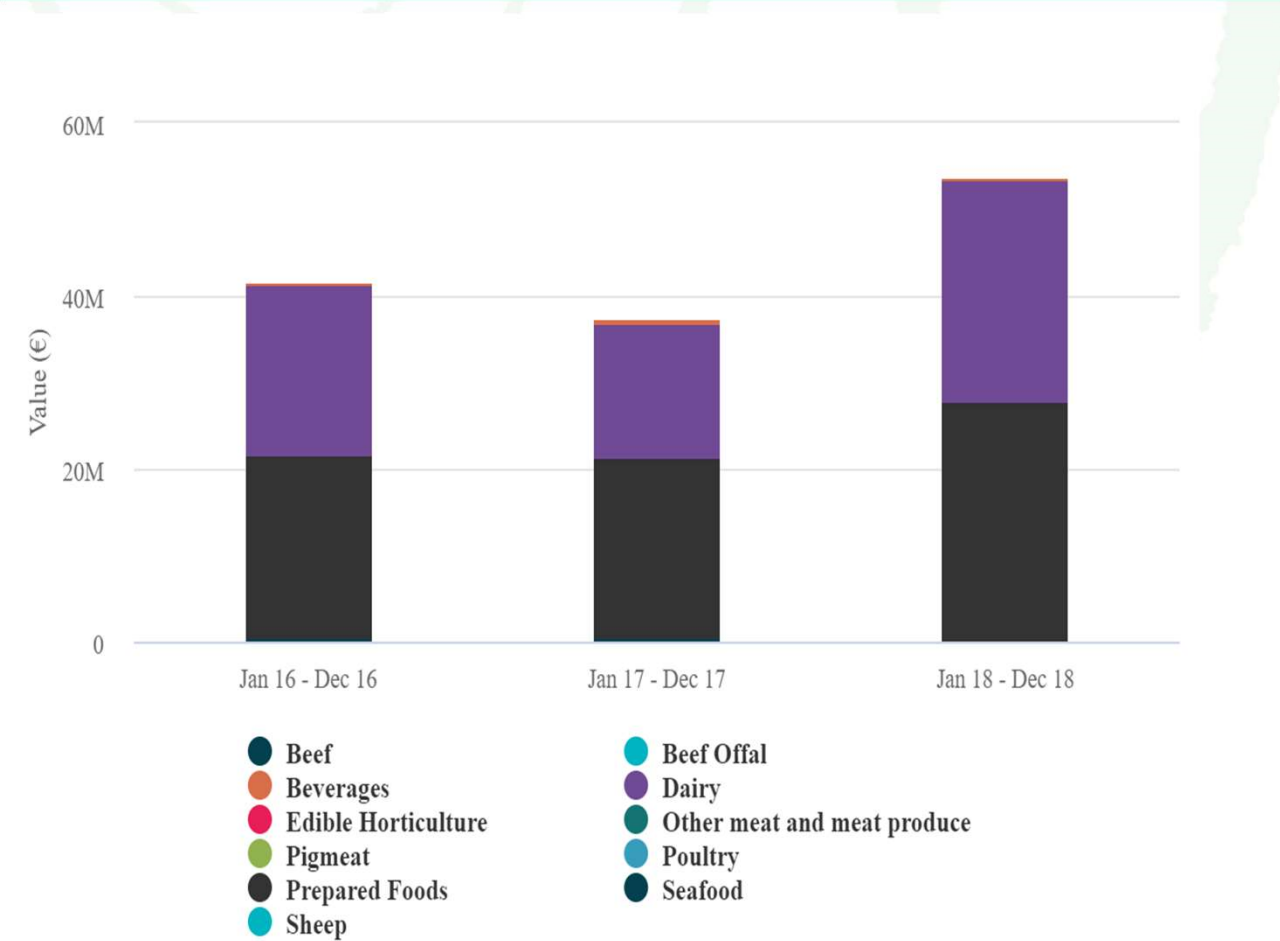
Vietnam

Australia

- 750 million people
- 10% world's population

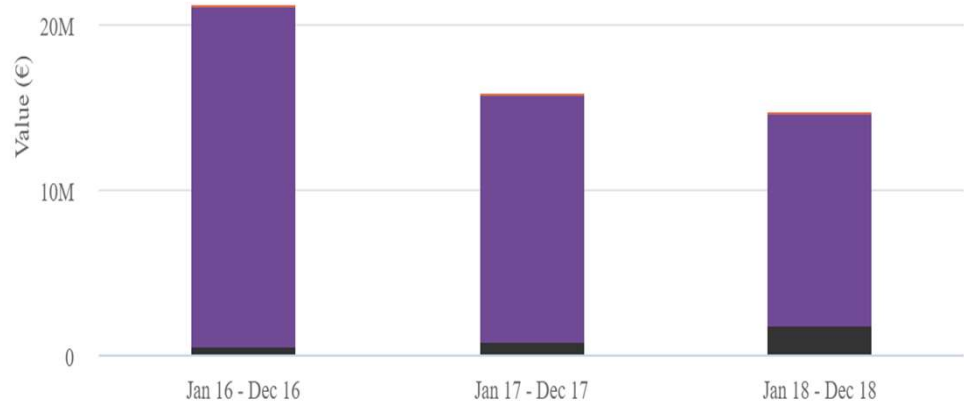


Irish Food & Drink Exports to Malaysia



- 2018 exports: €54m
- Jan-Aug 2019 exports were €39.3 million
 - 22% increase vs. the same period in 2018

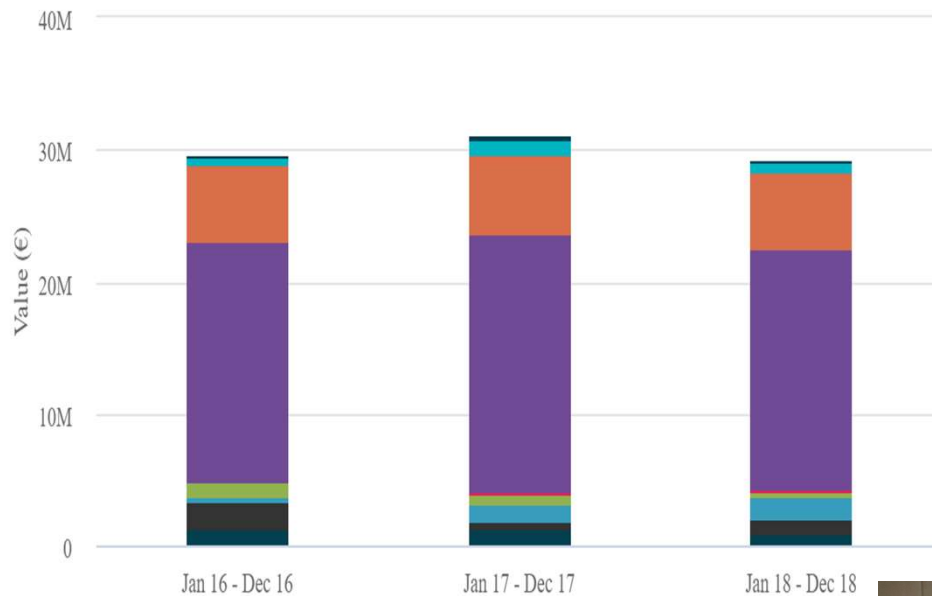
Irish Food & Drink Exports to Indonesia



- 2018 exports were €14.8 million
- Jan – Aug 2019 exports were €16.9 million
 - 83% increase vs. the same period in 2018
 - Increases largely attributable to SMP, casein and cheese



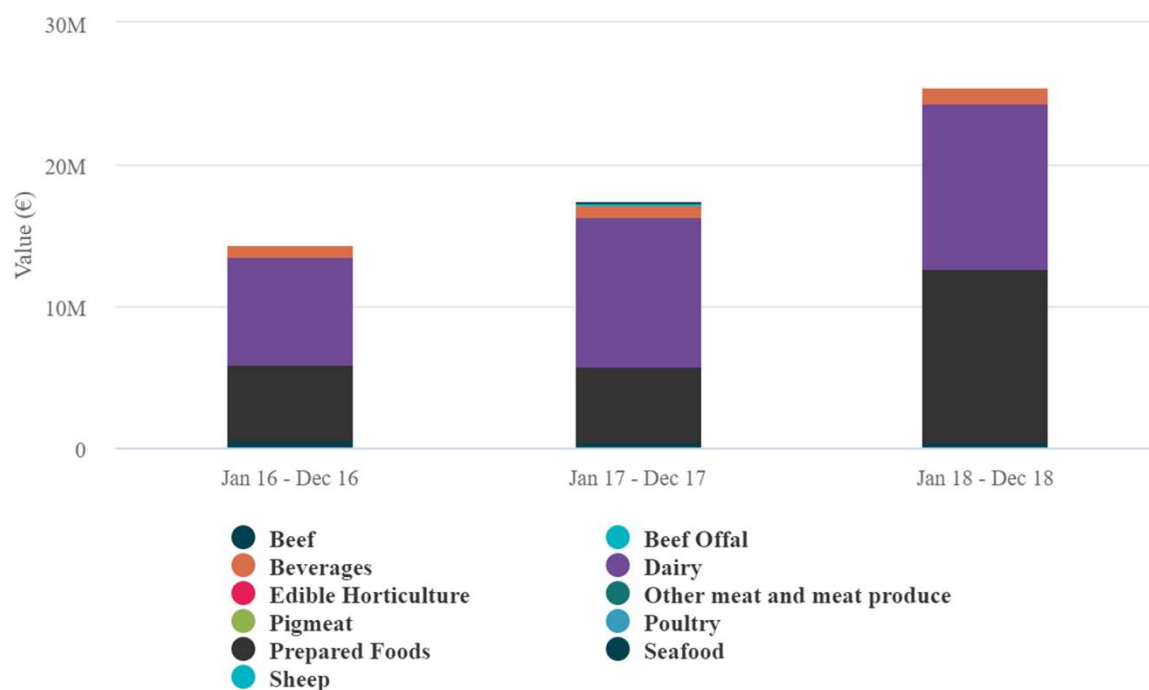
Irish Food & Drink Exports to Singapore



- 2018 exports were €29.3 million
- Jan-July 2019 exports were €14.7 million
 - 31% decline vs. the same period in 2018
 - Decreases largely attributable to declining volumes of dairy ingredients



Irish Food & Drink Exports to Thailand



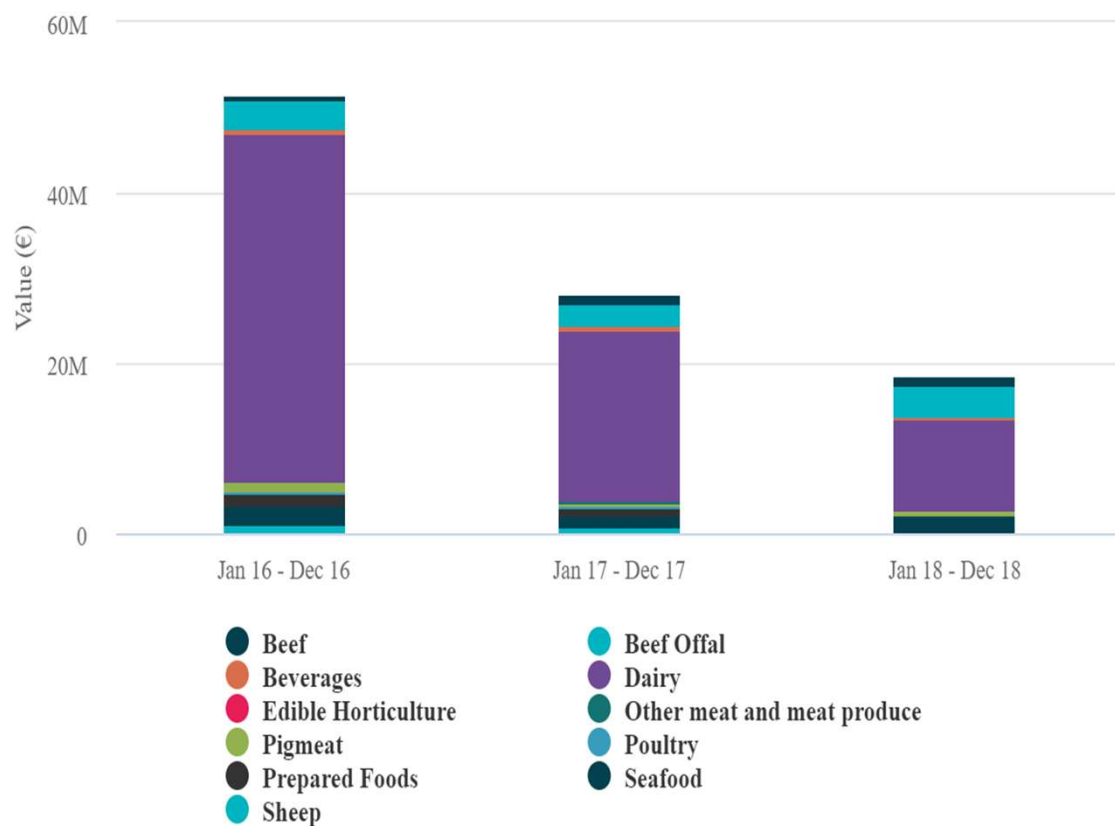
Source: www.bordbiaperformanceandprospects.com

- 2018 exports were €25.4 million
- Jan-Aug 2019 exports were €15.9 million
 - 16% decline vs. the same period in 2018
 - Decreases largely attributable to declining volumes of whole milk powder



Growing the success of Irish food & horticulture

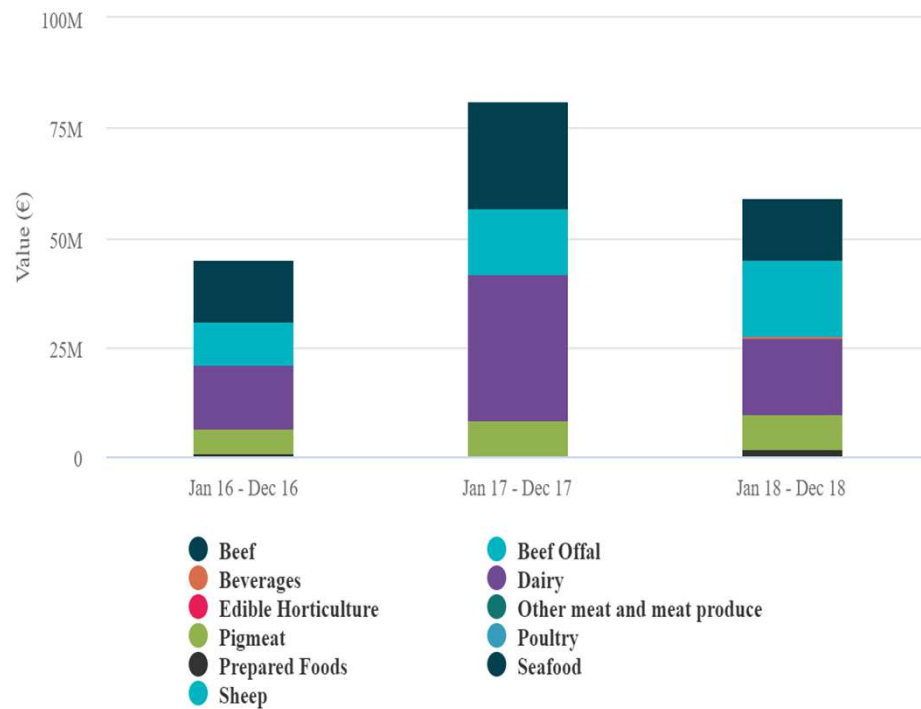
Irish Food & Drink Exports to Vietnam



- 2018 exports were €18.6 million
- This has rebounded in 2019, with exports Jan-Aug 2019 reaching €23.6 million
- 116% increase vs. the same period in 2018
- Increases largely attributable to infant formula and skim milk powder



Irish Food & Drink Exports to the Philippines

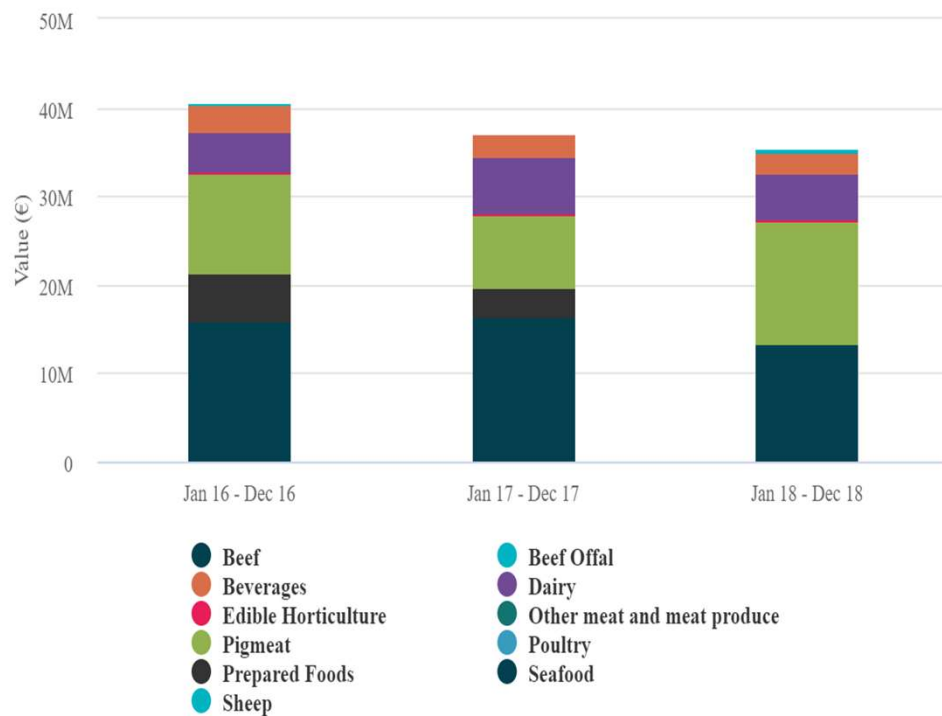


- 2018 exports were €60 million
- Jan-Aug 2019 exports were €48.9 million
 - 20% increase vs. the same period in 2018
 - Increases largely attributable to beef and dairy



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Irish Food & Drink Exports to South Korea

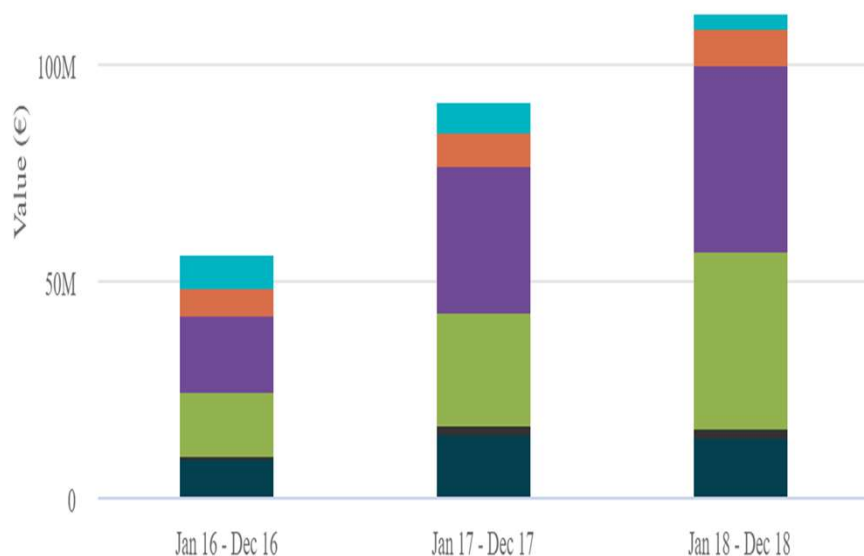


- 2018 exports were €35.6 million
- Jan-Aug 2019 exports were €23.2 million
 - 5% decline vs. the same period in 2018
 - Decreases largely attributable to pigmeat



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Irish Food & Drink Exports to Japan



- 2018 exports: €112.1 million
- Jan-July 2019 exports were €86.6 million
 - 29% YoY increase
- Increases largely attributable to seafood, dairy and pigmeat



RUGBY
WORLD CUP™
JAPAN 日本 2019



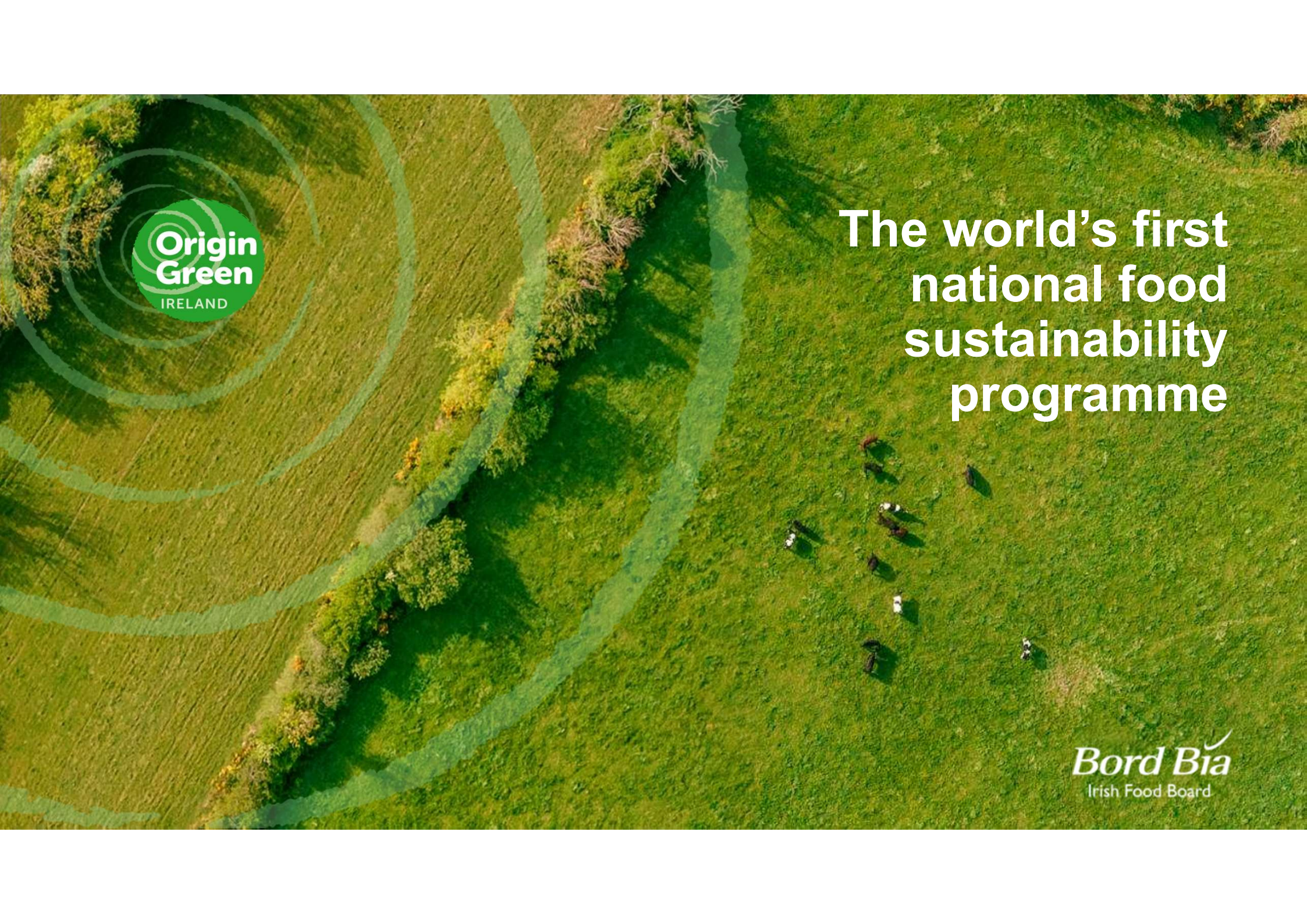
- Beef
- Beef Offal
- Beverages
- Dairy
- Edible Horticulture
- Other meat and meat produce
- Pigmeat
- Poultry
- Prepared Foods
- Seafood
- Sheep



Why Irish Food?



Growing the success of Irish food & horticulture

An aerial photograph of a lush green landscape. A river flows through the center, bordered by dense trees and vegetation. Several concentric green circles are overlaid on the left side of the image, centered around a small cluster of trees. In the bottom right, a small group of people is visible walking across the grass.

**Origin
Green**
IRELAND

The world's first national food sustainability programme

Bord Bia
Irish Food Board

Origin Green / A Full Supply Chain Programme

On 69,000 farms





10 retail and foodservice groups



344 food companies



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Video: Origin Green

Growing the success of Irish food & horticulture



Thank You

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