



Strategic Developments Within the Irish Egg and Poultry Sector

Peter Duggan

6th November



Growing the success of Irish food & horticulture

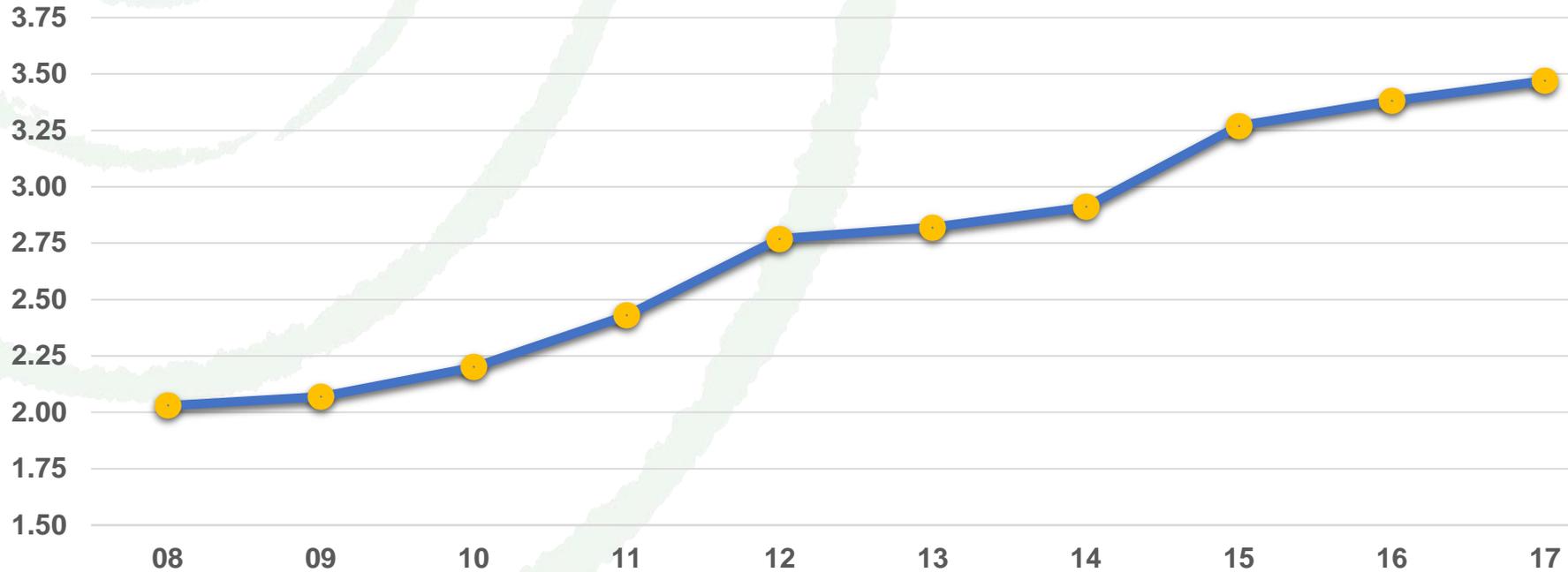
Bord Bia
Irish Food Board

Agenda

- Egg
 - Production
 - Consumption
 - Marketing Initiatives
 - SEAS
- Poultry
 - Production
 - Consumption
 - New Marketing Campaign
 - SPpAS
 - Strategy

Layer numbers have increased by 85% over ten years

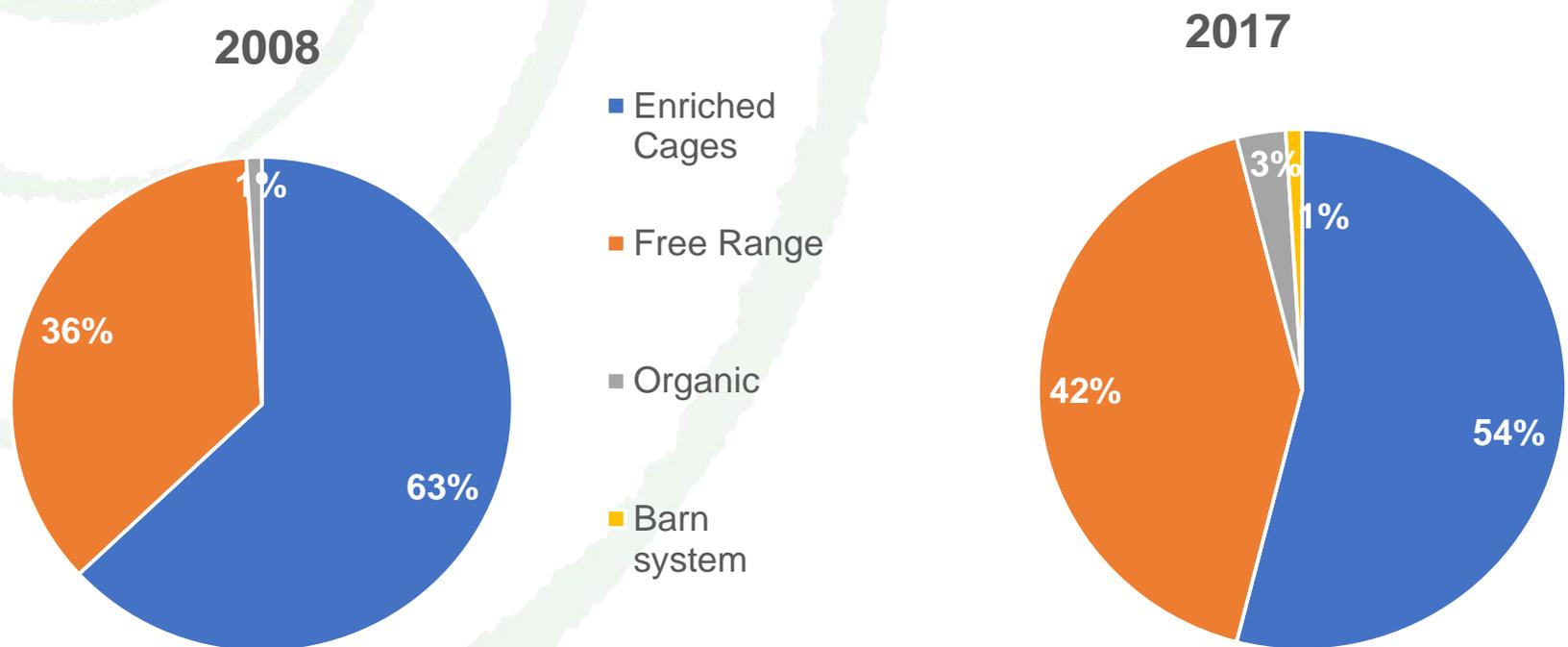
Million Layers



Source: DAFM

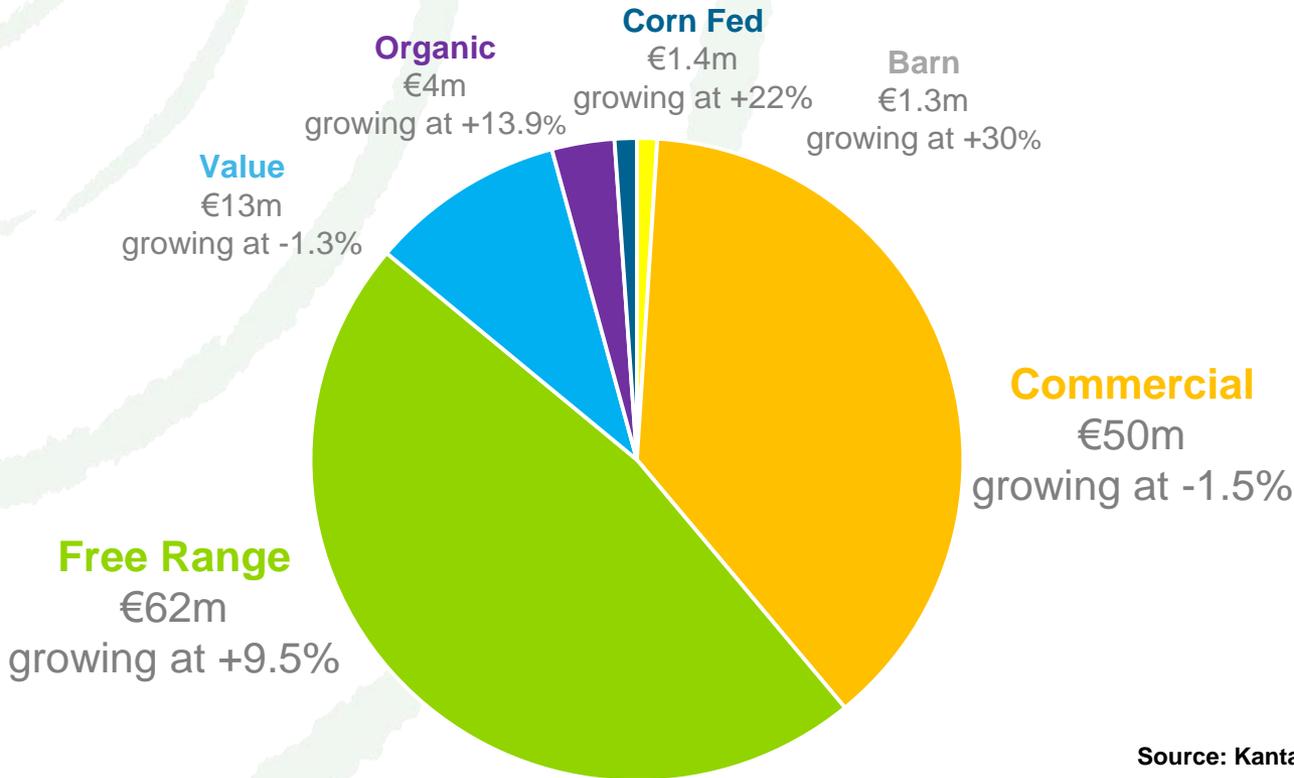
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A gradual movement towards free range production



Source: DAFM

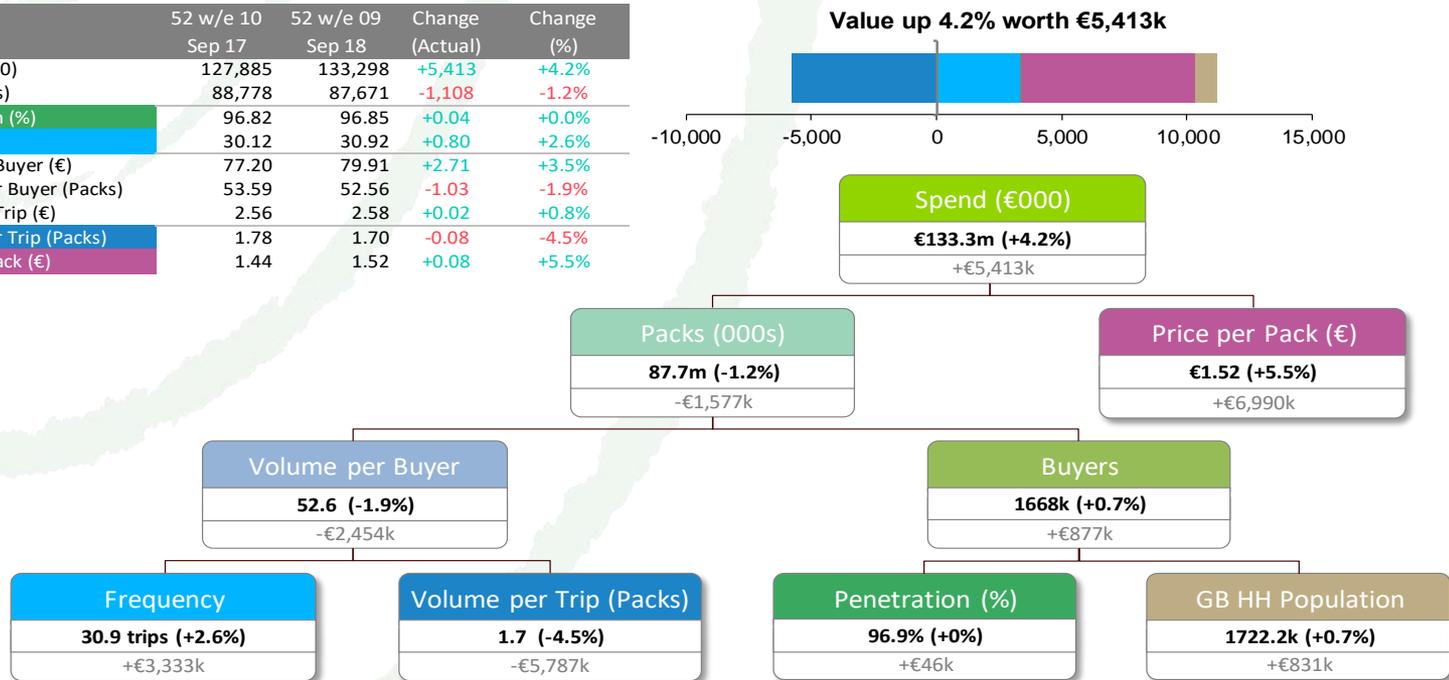
Smaller segments such as Organic, Corn Fed and Barn combined with Free Range are driving value into the market



Source: Kantar Worldpanel

The value of the egg market has increased 4% YoY

Measure	52 w/e 10 Sep 17	52 w/e 09 Sep 18	Change (Actual)	Change (%)
Spend (€000)	127,885	133,298	+5,413	+4.2%
Packs (000s)	88,778	87,671	-1,108	-1.2%
Penetration (%)	96.82	96.85	+0.04	+0.0%
Frequency	30.12	30.92	+0.80	+2.6%
Spend per Buyer (€)	77.20	79.91	+2.71	+3.5%
Volume per Buyer (Packs)	53.59	52.56	-1.03	-1.9%
Spend per Trip (€)	2.56	2.58	+0.02	+0.8%
Volume per Trip (Packs)	1.78	1.70	-0.08	-4.5%
Price per Pack (€)	1.44	1.52	+0.08	+5.5%



Source: Kantar

TV Adverts- May 21st - June 10th & October 1st - 21st



➤ 4 x 10 sec TV adverts

➤ Key messages

1. Ease of cooking.
2. Versatility.
3. Providing meal inspiration.

❑ The TV Ads are performing well with a 41% recall amongst all adults.

After viewing the TV Ad, 1.7 million adults claim they are more likely to purchase more eggs with the Bord Bia Quality Mark in the future.



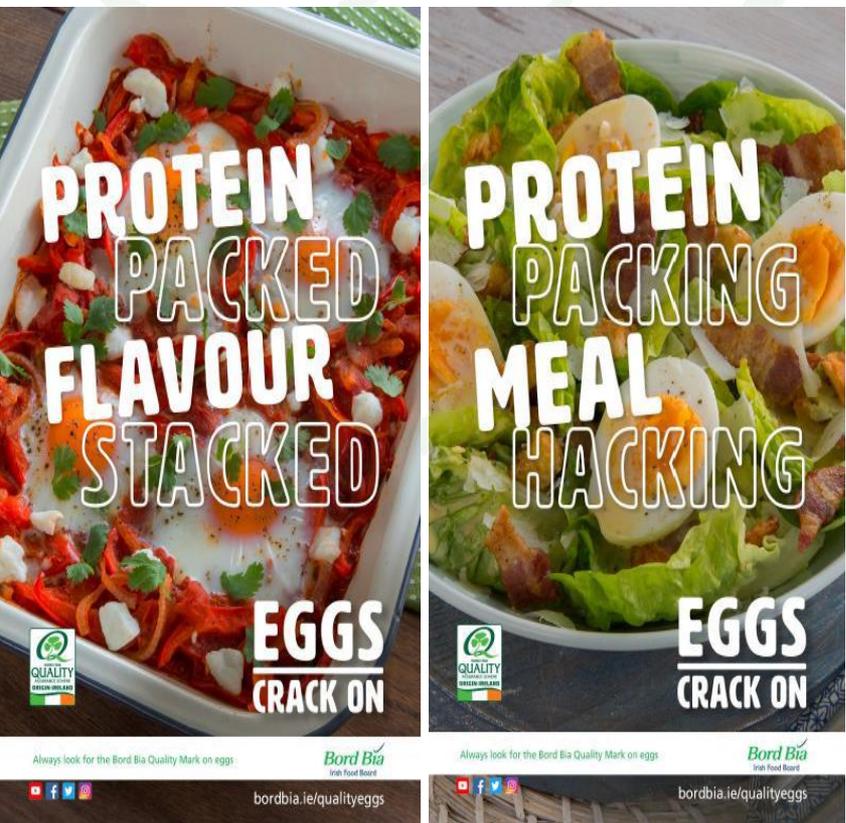






Outdoor Posters - May 28th – June 10th & October 8th – 22nd

340 nationwide sites

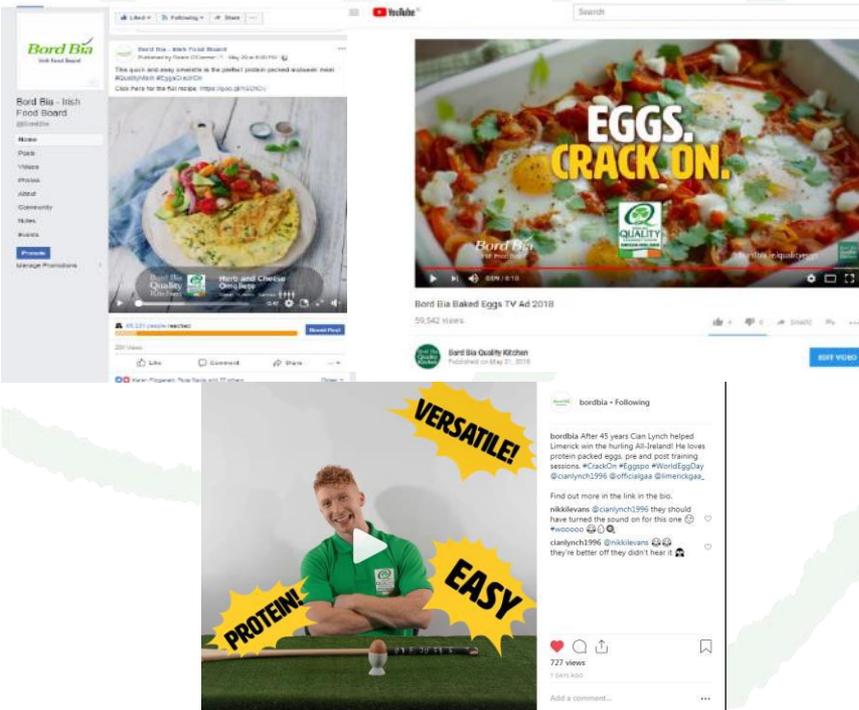


May Burst:

- ✓ **27% recall** of the ads – norm = 19%
- ✓ Highest recall amongst young family at 33%

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Digital Campaign - May 21st – June 10th & October 1st - 21st



- Facebook, Instagram, Google Search, Online players, YouTube.
- Reached over 500,000 individuals online.
- 700,000 combined views of the TV ads on online channels.

Eggs? | See Our Easy Recipes Here | BordBia.ie

www.bordbia.ie/Quick/Recipes (01) 668 5155

Create Quick & Healthy Meals with Our List of Delicious Recipes. Egg Recipes. Pancakes. Breakfast, Lunch & Dinner. Get Yourself a Six Pack. Quality Mark. Styles: Poached, Boiled, Fried, Scrambled.

[Eggs Benedict](#) · [How to Boil an Egg](#) · [How to Scramble Eggs](#) · [How to Poach an Egg](#)

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Popular Recipe Video



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PR Campaign - World Egg Day October 12th



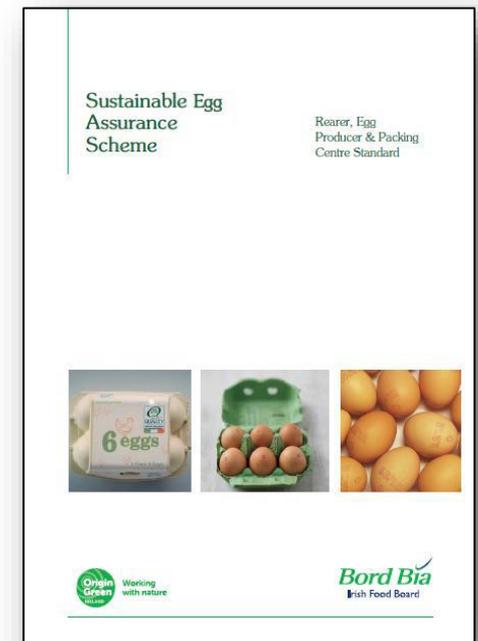
- 3 Egg ambassadors – Roz Purcell, Cian Lynch and Nikki Evans.
- Coverage across Print (The Irish Times, Irish Examiner, Irish Daily Mail), Online Coverage (The Journal.ie, Joe.ie, Off The Ball) and Social Channels.
- Total PR budget: €30,000
- Total PR coverage value: €454,257.



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Sustainable Egg Assurance Scheme (SEAS)

- Launched 1st November 2017. Over 250 houses audited & completed to date.
- SEAS participants are members of Origin Green
- In 2019 each individual production house will receive a performance report with their carbon emissions and other sustainability metrics.
- Packing Centres also required to collect sustainability data.
- The scheme is open to Pullet Rearers, Egg Producers & Egg Packing Centres.





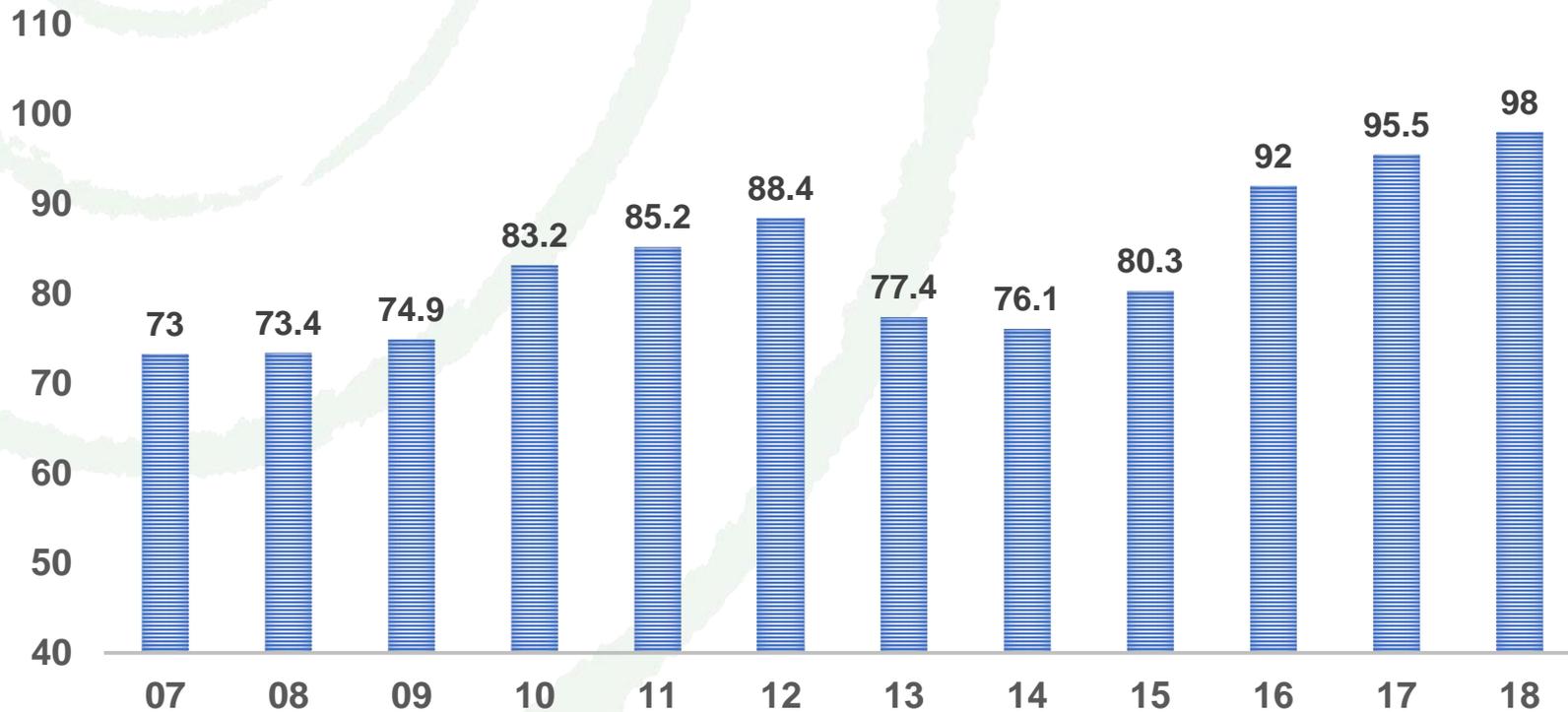
Poultry Sector

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Bord Bia
Irish Food Board

Irish poultry supplies at record high

Million head

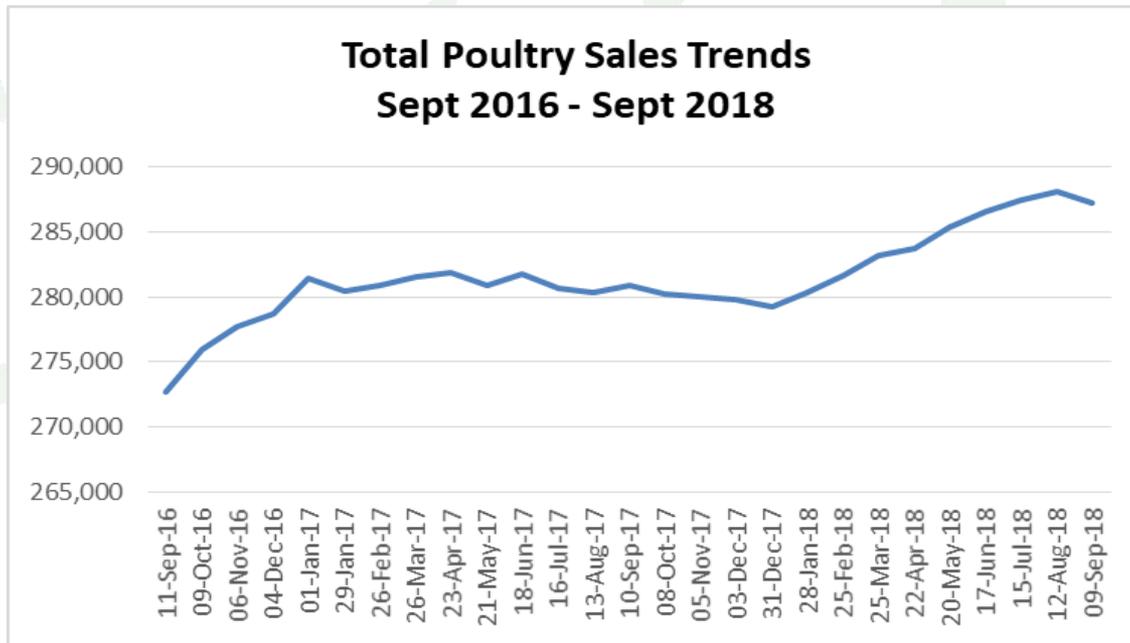


Source: DAFM

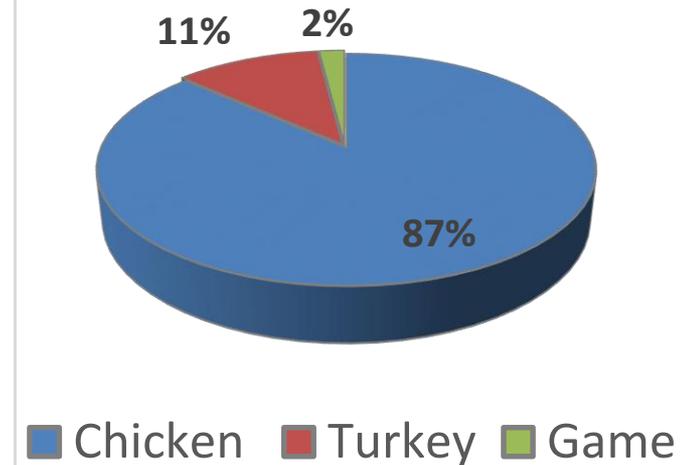
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Poultry Sales Trends (excluding Duck)

Total Poultry sales worth €287m by December 2017

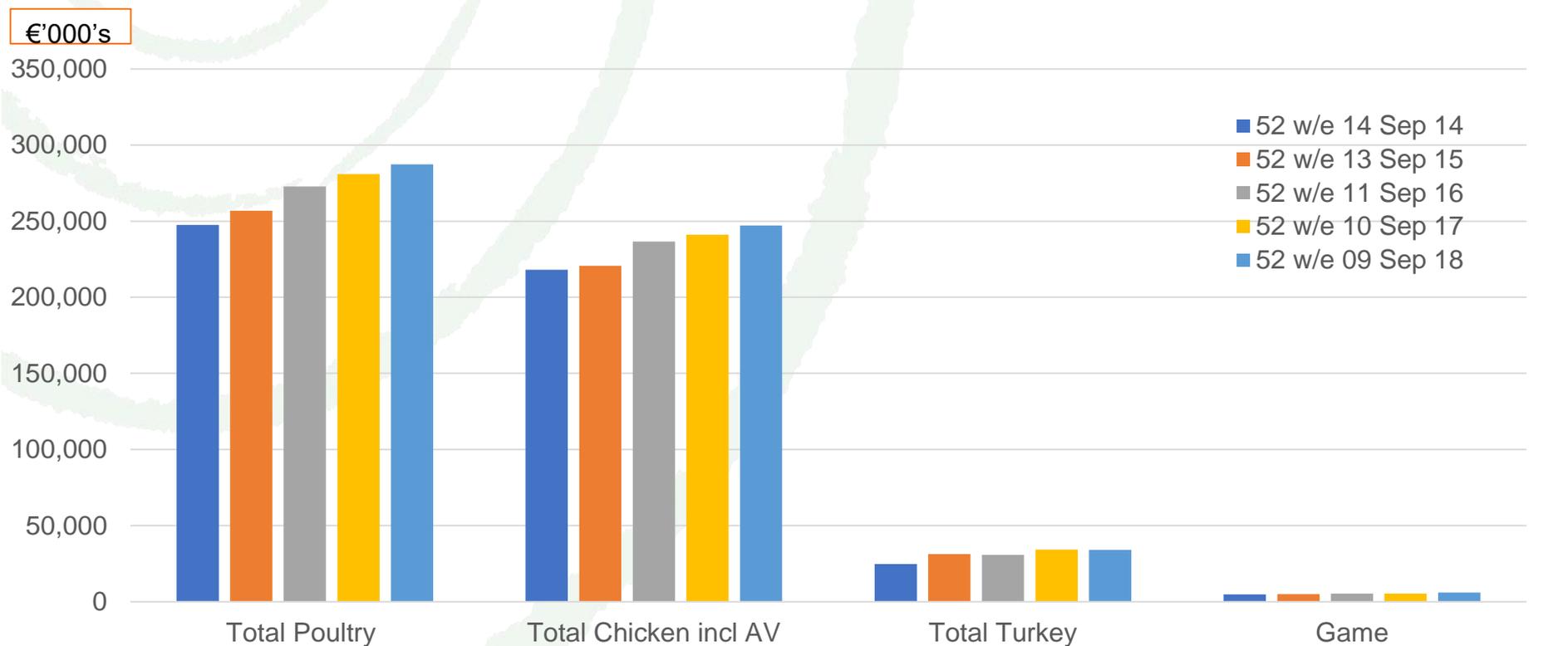


Poultry Split by Segment



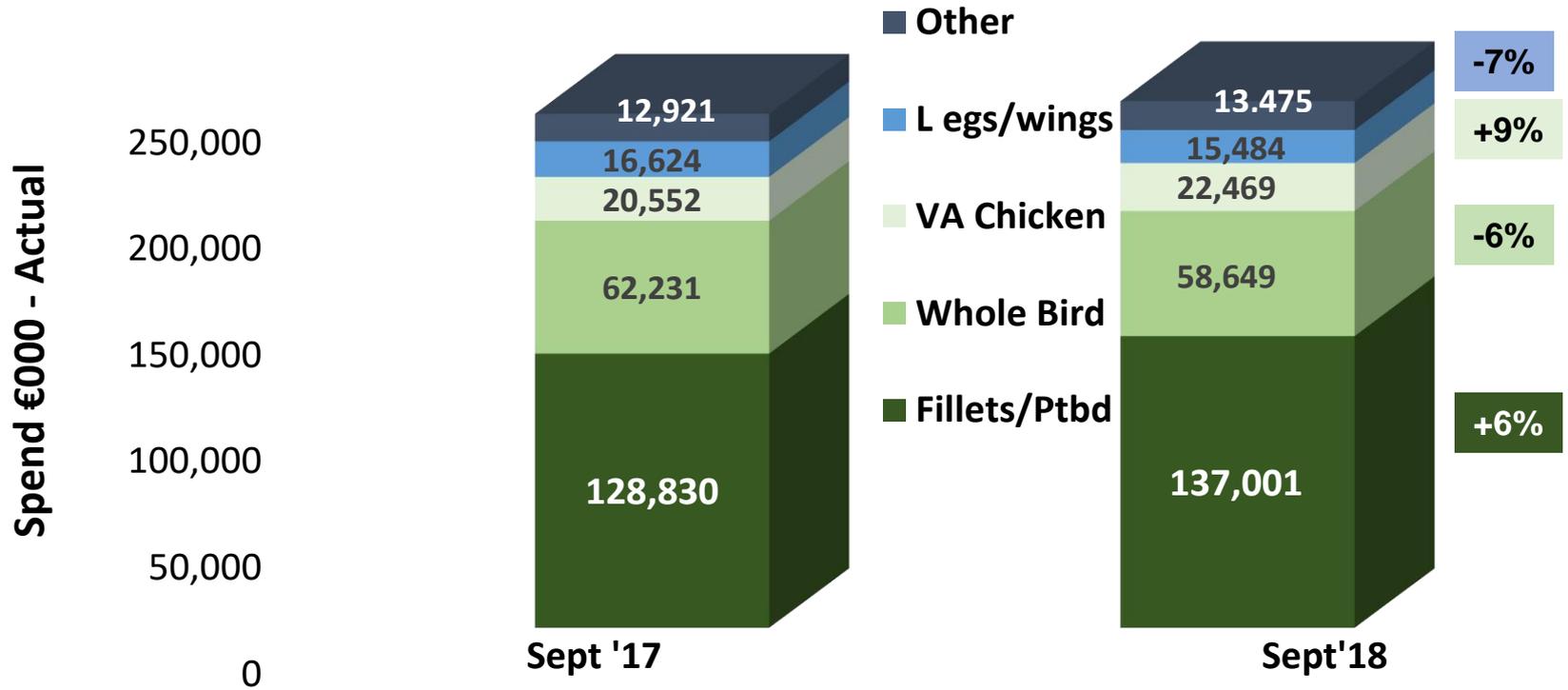
Source: Kantar

Poultry in value terms has grown strongly over the last 5 years



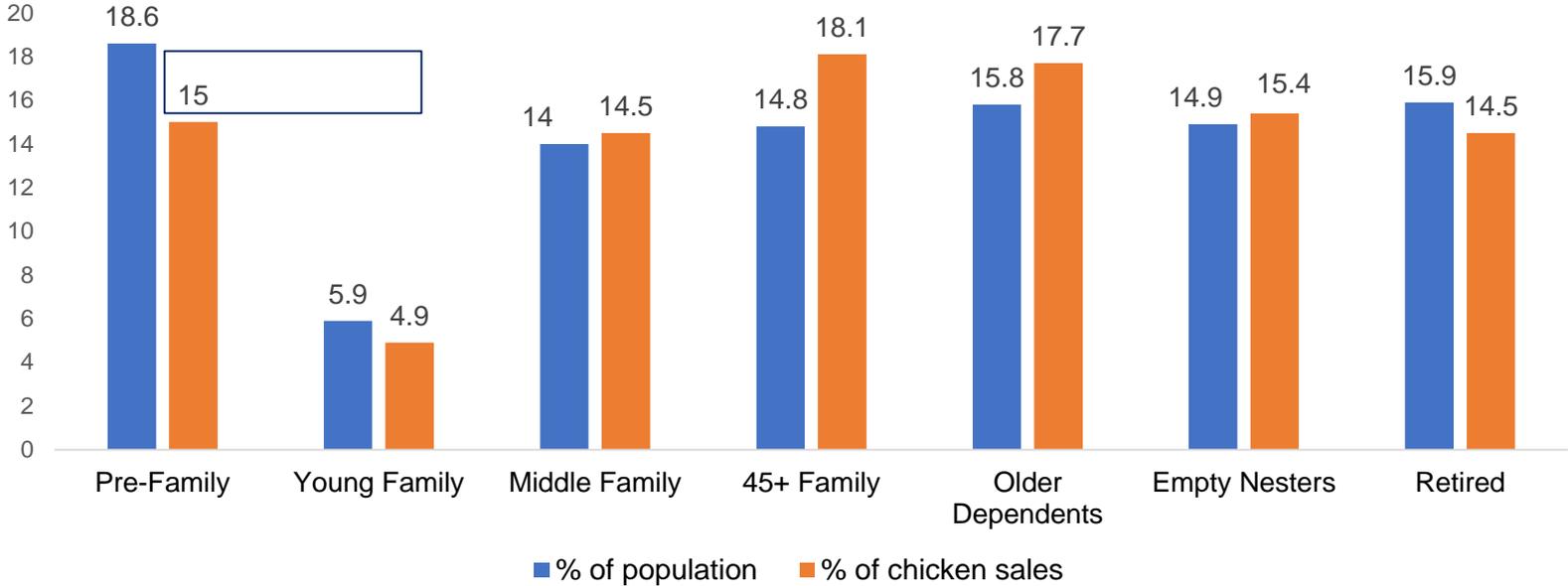
Source: Kantar

Chicken category 2% higher at €247m YoY



Source: Kantar

Pre and Young Families under index in the chicken category



Source: Kantar

New Marketing Strategy for Chicken

- **Business Objectives:**

- Grow the sales volume of Quality Assured chicken by increasing frequency of purchase within the fillet and wholebird category

- **Communication Objective:**

- Create a distinctive campaign that will inspire consumers to take another look at chicken.
- Increase awareness amongst our target audience of the versatility of chicken and drive frequency of purchase through meal inspiration.

- **Target Audience:**

- Pre-family, 25-44 year olds
- Young family, 25-44 year olds



Communication Strategy:

Lead with a new TV ad and supporting with a combination of out of home, digital & PR.

- **TV** Supported by video on demand & YouTube
- **Outdoor** Outdoor sites will be located at key purchasing points nation wide.
- **Digital** includes social media support, web site content & pay per click (ppc) search.

Campaign Messaging: There are no limits to where chicken can take you.

✓ Background:

- Chicken is in nearly every home in the country (95%). Its benefits from being versatile, easy to cook, lean and a great source of protein.
- However frequency of purchase is dropping, especially for our pre-family bullseye.

Insight:

- People crave exciting tasty food solutions and are avid hunters of recipe inspiration.
- Chicken is seen as the workhorse meat, not a meat that knows no bounds.

✓ Chicken Proof Points:

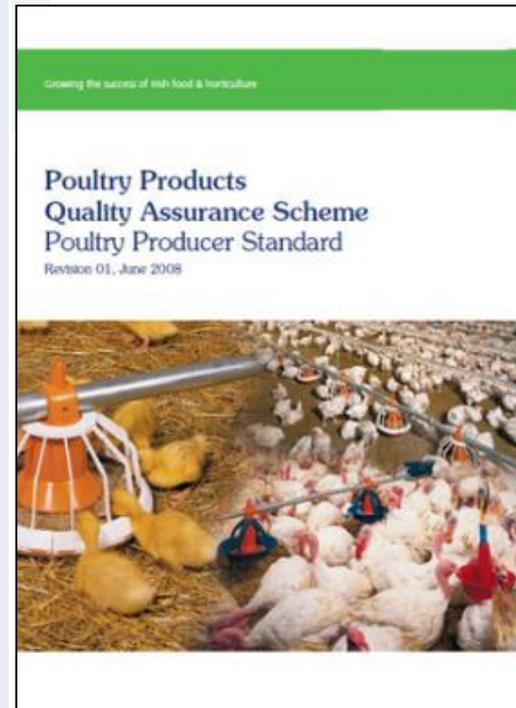
- Simple & easy carrier of any flavour – it's the solid foundation that any meal can be built from
- Chicken carrying the Quality Mark (QM) is a product you can trust –it's Ireland's only independent checked QM

Media Plan 2019: New Chicken Ad will be on air for 6 weeks in 2019



Sustainable Poultry products Assurance Scheme (SPpAS)

- ❏ Current Poultry Products Quality Assurance Scheme was launched in 2008
- ❏ Revision underway to convert into a Sustainable Assurance Scheme
- ❏ Scheme will be open to Breeder Rearers, Breeder Layers, Hatcheries & Broiler producers.
- ❏ Sustainability criteria will be included and all farmers to receive performance report including carbon emission calculation.
- ❏ Currently being reviewed by INAB.
- ❏ Will launch in early 2019.

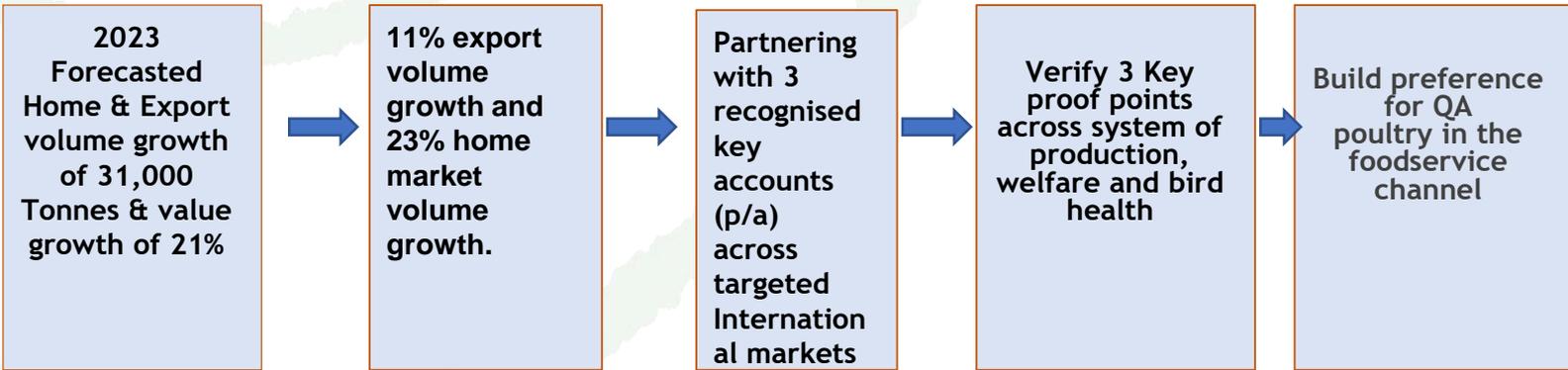


New Meat Strategy

- 5 year strategy

- Beef
- Chicken
- Pigmeat
- Sheepmeat

- 5 Goals for Chicken Strategy





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