

BORD BIA

Leading the Future of Food
INTB7

Executive Summary

Strengthening Bord Bia's Global Position through Market Expansion & Sustainability

Bord Bia is strategically positioning itself to drive sustainable growth and expand into high potential global markets. With shifting consumer demands and emerging opportunities, our strategy unlocks new avenues for growth while reinforcing Bord Bia's commitment to sustainability. Through in-depth analysis and industry insights, these identified key interventions, will future-proof its success.

Our approach is centered on two core initiatives:

Halal Market Transnational Expansion

- Establishing certification partnerships with key UAE regulatory bodies (ESMA, IFI, HIA).
- Differentiating Irish Halal food through quality, sustainability, and traceability.
- Partnering with UAE-based retailers & distributors to drive market penetration such as Waitrose and Carrefour.
- AI-driven market intelligence & consumer insights to optimize strategy.
- Long-term Plan: Expanding into Southeast Asia post-UAE market establishment.

Sustainability Innovation

- Enhancing Origin Green with expanded carbon reduction initiatives.
- Investing in alternative proteins & regenerative agriculture for sustainability such as investing in research institutions and initiatives such as seaweed farming.
- Blockchain traceability to improve transparency in the supply chain whilst promoting safe practices and Halal standards for certain products.
- Strengthening sustainability-linked training & incentives for Irish farmers and promoting global adoption of knowledge base through collaboration with GFSI.

Orientation

- Define Bord Bia's mission & goals.
- Analyzing internal positioning via SWOT.
- Establish reasoning for market positioning in the UAE.
- Identify sustainability priorities & competitive advantages.
- Outline strategic focus areas (Halal certification, quality, traceability).

Diagnostic

- Analyze the firm and market opportunities through PESTLE, Porter's Five Forces, and industry insights.
- Assess competitor landscape and outline demand for sustainable Halal products.
- Identify market barriers & opportunities in Halal food expansion. (UAE food regulators)
- Explore marketing opportunities with cultural sensitivity and AI-insights
- Evaluate Bord Bia's supply chain, compliance requirements, and consumer trends.

Intervention

- Identify plan to execute Halal market expansion strategy (certifications, partnerships).
- Launch AI-driven branding & digital outreach for UAE consumers by streamlining current marketing efforts and introducing personalized marketing.
- Implement sustainability innovation projects (carbon tracking, alternative proteins).
- Strengthen Bord Bia's UAE distribution & retail partnerships with HORECA, Carrefour and Waitrose.

Evaluation

- Track KPIs and checkpoints such as Halal sales growth, AI-driven consumer engagement, sustainability compliance.
- Gather stakeholder feedback from UAE partners & consumers.
- Conduct quarterly performance reviews & competitive benchmarking for continuous growth.
- Adjust strategy based on market trends & regulatory updates that may occur.

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Stage 1 - Orientation



Scope of Project

Our aim is to assess Bord Bia's Strategy and Managerial choices in relation to Sustainability and Market Expansion. By taking on the role of consultants we identify possible points of improvement particularly considering their Statement of Strategy.

Key Focus Areas

- **Halal Market Entry** – Expanding Ireland's food exports into the UAE, focusing on Halal-certified beef.
- **Market Research & Consumer Insights** – Analyzing UAE consumer preferences, key distribution channels, and pricing strategies.
- **Regulatory Compliance & Certification** – Ensuring all Irish beef exports meet UAE's halal certification and import regulations.
- **B2B Partnerships & Distribution Strategy** – Establishing connections with retailers, hotels, restaurants, and distributors.
- **Branding & Market Positioning** – Creating a premium Irish halal beef brand with quality assurance, sustainability, and origin transparency.
- **Financial Feasibility & ROI** – Assessing the break-even point, investment needs, and profit margins.



Bord Bia – Ireland's Food and Drink Authority

Championing Irish food, drink, and horticulture globally through sustainability, quality, and innovation

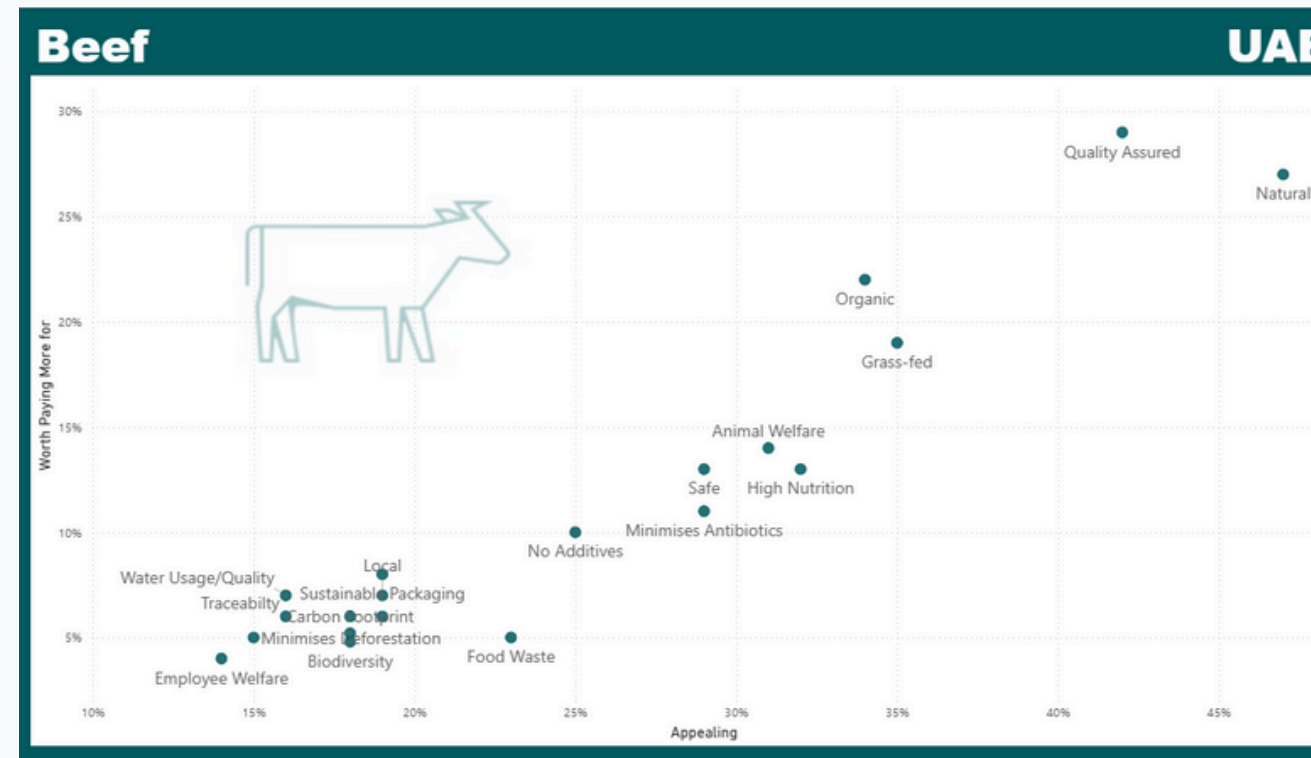


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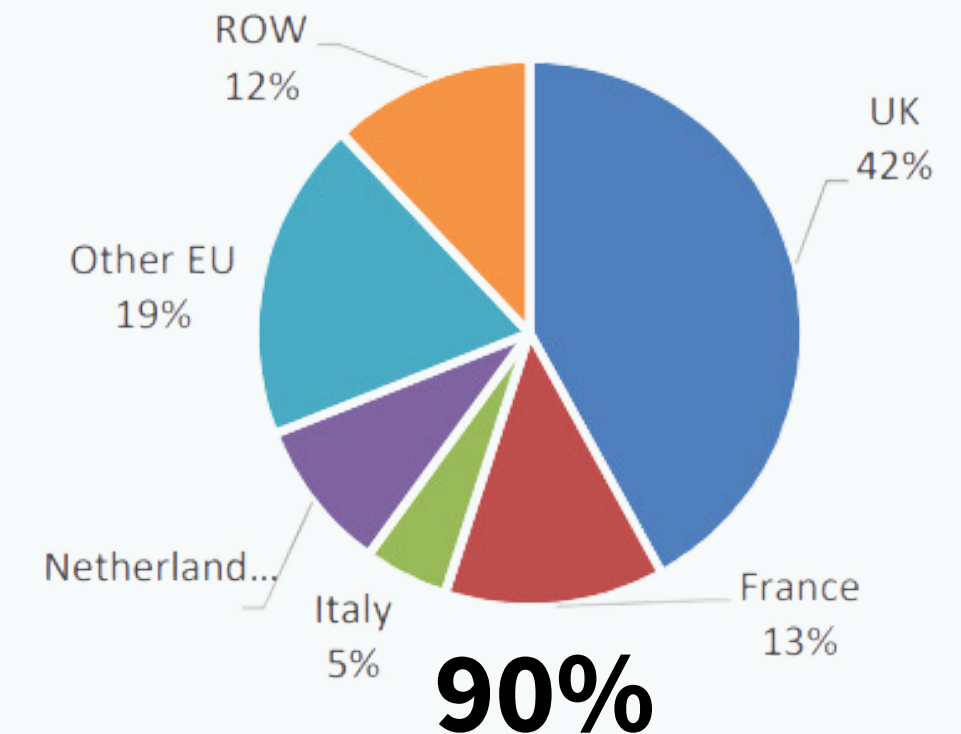
Of UAE beef consumers are willing to pay a premium for quality assured beef, ahead of all other attributes

Current Position of Bord Bia

- Global Reach: Offices in Europe, Asia, North America & the Middle East
- Export Value: €17 billion in Irish food & drink exports (2023)
- Sustainability Leader: Over 71,000 farms & 300+ companies in Origin Green. **The Origin Green programme** aligns with 15 of the 17 UN SDGs.
- Halal Market Entry: New focus on UAE Halal-certified food exports.



Sustainability attributes Consumers find most Appealing.



Of beef produced in Ireland is exported worldwide

Strengths

- Strong Sustainability Leadership, (71,000 farms in Origin Green)
- Government Support for Policy Backing and Funding
- High Quality Reputation
- Experience Team of Professionals
- Innovation Driven

Weaknesses

- Carbon Footprint Challenges
- Limited Market Diversification
- Brand Inconsistencies
- Digital Marketing Gaps
- Emerging Market Barriers



Opportunities

- Sustainability Trends
- Global Market Expansion
- Digital Transformation
- Health and Ethical Food Demand
- Industry Collaborations

Threats

- Regulatory Uncertainty with sustainability laws
- Intense Global Competition
- Economic Instability
- Shifting Consumer Preferences
- Rising Production Costs



Competitor	Competitive Advantage	Bord Bia's Advantage
European Agencies:		
Business France	Strong Presence in High-End Restaurants & Hotels	Irish dairy, beef, and seafood can compete in both premium and mass-market segments , unlike French luxury products.
Italian Trade Agency (ITA)	Strong International Presence - Highly Recognisable Food Brands	Sustainability - Ireland's low-carbon, sustainable food production is a key selling point that ITA does not emphasise as strongly.
ICEX Spain Trade and Investment	Established Halal Certification Reputation - Spain has a well-established halal meat export sector, making it a strong player in the UAE	Quality - Ireland is a global leader in premium meat and dairy, while Spain focuses more on processed products.
North American Agencies:		
U.S. Foreign Agricultural Service (FAS)	Strong Marketing & Branding Power – American food brands have high visibility and strong consumer trust due to aggressive marketing and global influence.	Premium Quality Meat - U.S. beef is grain-fed and mass-produced, whereas Irish beef is 100% grass-fed, making it a premium product in the UAE market.
Cargill's Canada	Strong global presence, supplying Halal-certified beef to the UAE and the wider Middle East. Primarily a B2B bulk supplier.	UAE consumers favor eco-conscious brands. Irish beef perceived as more trustworthy & authentic. More appeal to high-end consumers & restaurants.



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Stage 2 - Diagnostic



PESTLE Analysis

Political

- Strong government sustainability policies
- Aligned with 15 of 17 UN SDG.
- **Strengthen engagement with EU Green Deal** policies to enhance compliance and funding opportunities.

Economic

- Increasing export opportunities
- **Inflation Risks/Currency fluctuations**
- Spending patterns of Consumers influence Market Demand
- Big contributor to Irish economy in food and drink exports - €17 billion last year
- Ethical investment funds prioritizing sustainable food production

Social

- Demand for ethical & sustainable food
- Changing consumer preferences: **Health Consciousness and Ethical considerations.**
- Rising preference for carbon labeled products

Technological

- Emerging technologies offer new avenues for reaching consumers and managing supply chains. - AgNav
- Adoption of blockchain, AI-driven marketing, **traceability of products and data analytics**

Legal

- Compliance with EU sustainability regulations (CSRD)
- **Food safety regulations/ labelling requirements/** Intellectual property laws laws impact product development and market access
- Regular audits/reports
- Stakeholder engagement/communication e.g., Sustainability survey & CSDDD.

Environmental

- Carbon footprint reduction goals
- Sustainability concerns and environmental regulations influence production practices and consumer choices.
- **Origin Green Program.**
- Incentivization of farmers to implement carbon sequestration techniques



Porter's 5 Forces



Bord Bia Industry Insights

Irish Food & Beverage Export Performance (2024-2025)

- **Record Exports:** €17 billion in Irish food, drink, and horticulture exports (+5% YoY).
- Sector Performance:
- **Dairy:** €6.3 billion (stable YoY).
- **Meat & Livestock: €4.3 billion (+6% YoY), strong beef & pigmeat exports.**
- **Prepared Consumer Foods (PCF):** €3.4 billion (+7% YoY), growth in meal solutions, bakery, and confectionery.
- **Drinks:** €2.1 billion (+19% YoY), led by whiskey & ready-to-drink products.
- **Seafood:** €595 million (+9% YoY).
- **Horticulture & Cereals:** €325 million (+4% YoY), with mushrooms as a key driver

Global Market Expansion & Halal Market Opportunity

Export Destinations:

- EU & UK: €5.9 billion each, with dairy & meat exports seeing strong growth
- North America: €2 billion (+14% YoY), driven by drinks & dairy.
- Asia: Strong performance in beef & seafood, but dairy exports declined by 10%.
- **Middle East & Africa: €950 million (+10% YoY), strong demand for Halal-certified meat & dairy.**
- Growth in demand for Halal-certified Irish meat & dairy in the Middle East & North Africa (MENA) region.
- Live exports to Morocco exceeded €30 million, indicating increasing Halal market demand.
- Irish exporters should leverage Halal certification to expand market presence in key Muslim-majority countries.

Irish Foodservice Market Trends (2023-2024)

- Market Growth: Foodservice industry reached €9.3 billion, surpassing 2019 levels.
- Challenges: Rising costs, VAT increase to 13.5%, labour shortages.
- Consumer Shifts:
- Demand for value-driven dining.
- Consumers reducing alcohol consumption, ordering fewer courses.
- **Increased focus on premium experiences in dining.**

Key Takeaways

- Cost Management: Price pressures remain high; efficiency is key.
- Sustainability: Origin Green program critical for future-proofing exports.
- **Diversification: Increased focus on Halal markets in MENA & Asia.**
- **Value & Premiumization: Adapt to changing consumer preferences with affordable, high-quality offerings.**



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Stage 3 - Intervention



Halal Market Expansion – Market Opportunity



29%

Of UAE beef consumers are willing to pay a premium for quality assured beef, ahead of all other attributes

Why?

- Global Halal Food Market: \$2.3 billion in 2024, projected to grow to \$2.52 billion in 2025.
- Current portion of Irish Beef exports to UAE : €0.51 Million
- Ireland is the 6th largest beef exporter.
- Key Target Markets: UAE, Indonesia, and Southeast Asia.
- Challenges & Compliance: Ethical concerns in Europe, certification requirements (**ESMA, IFI**).

How?

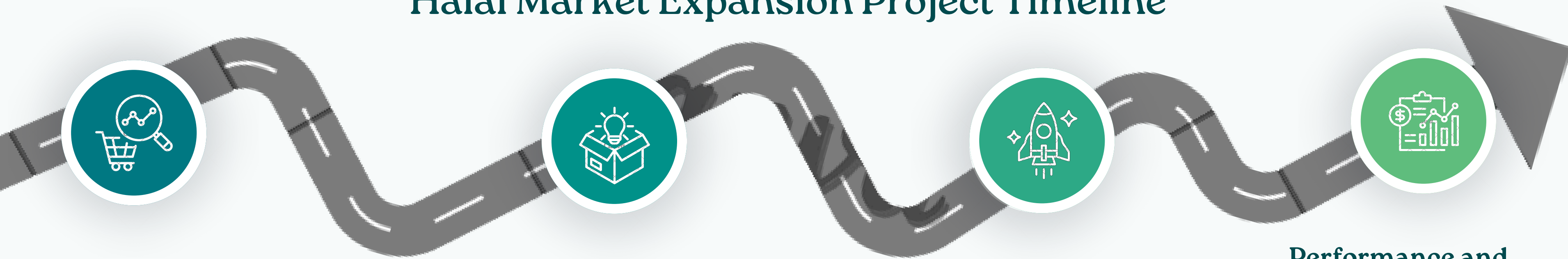
- The Islamic Foundation of Ireland allows Irish companies to supply certified Halal food within Ireland and also export Halal food abroad.
- Combining Halal Certification and the Bord Bia Quality Mark. Bringing Irish Halal meat to superstores such as Tesco, Lidl, Aldi and Dunnes. Improving cultural diversity and inclusion with food.
- Exporting sustainably produced Halal beef to UAE and worldwide through retailers like Carrefour, Waitrose and HORECA for catering services.

83,300

Muslims living in Ireland who can only purchase Halal meat at specialty stores with higher price points and lower health and safety standards



Halal Market Expansion Project Timeline



Establishment

Phase 1 - Planning

- 3 - 6 Months Key Focus: Establish Partnerships
- Link with UAE ESMA and HIA
- Educate Irish producers on Halal Food Standards

Market Penetration USP

Phase 2 - Pilot

- 6 - 12 Months Key Focus: Test Market Validation
- High Quality Meat and Dairy
- Sustainability Standards
- Trusted Traceability
- Premium Pricing
- Expand Product Line

Marketing Phase 3 - Full Launch

- 12 -18 Months Key Focus: Expand Market Presence
- Cultural sensitivity
- Online campaign with halal food creators
- AI-driven personalised marketing

Performance and Scalability

Phase 4 - Evaluation & Scaling

- 18+ Months Key Focus: Measure KPI's, Scale Operations
- Number of outlets distributing Irish Halal goods (e.g. Carrefour...)
- Sales Growth per quarter
- Market Share
- Social Media Engagement
- Long term Scalability



Sustainability Innovation – Alternative Proteins & Origin Green



Alternative Proteins & Regenerative Agriculture

- Seaweed farming in Origin Green and AgNav boosts carbon offset improving marine life. Potential to sell culinary seaweed and export.
- Absorbs CO₂, cuts emissions via animal feed, and supports biodegradables.
- Research and incentives strengthen Ireland's eco-food leadership. Specifically research in plant-based meat alternatives by cloning cells to create beef, chicken fish products.
- Transitioning with consumer demands to sell plant-based realistic meat products sustainably within Ireland and being a global market leader.

Enhancing Origin Green

- Expand sustainability-linked audits for producers including those in Halal meat. Improving sustainability and safety trackability.
- Provide Bord Bia Quality Mark alongside Halal Certification for meat products.
- Introduce carbon offset initiatives and collaborate with UN on findings.
- Provide sustainability course for members of Origin Green improving knowledge base of Irish producers.



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Stage 4 - Evaluation



Feedback and Continuous Improvement

Producer & Retailer Surveys

Insights on Halal certification adoption & sustainability programs:

- Identification of key barriers
- Assess retailer demand & preferences
- Pricing expectations
- Producer capabilities

Impact: Positions Irish Halal products as high quality, ethical & sustainable

Competitive Benchmarking

Adjusting strategy based on global industry trends:

- Analyze successful Halal food exporters
- Pricing & Branding strategies
- Certification standards

Impact: Refinement of Halal positioning by adopting global best practices and strategies

Quarterly Strategy Reviews

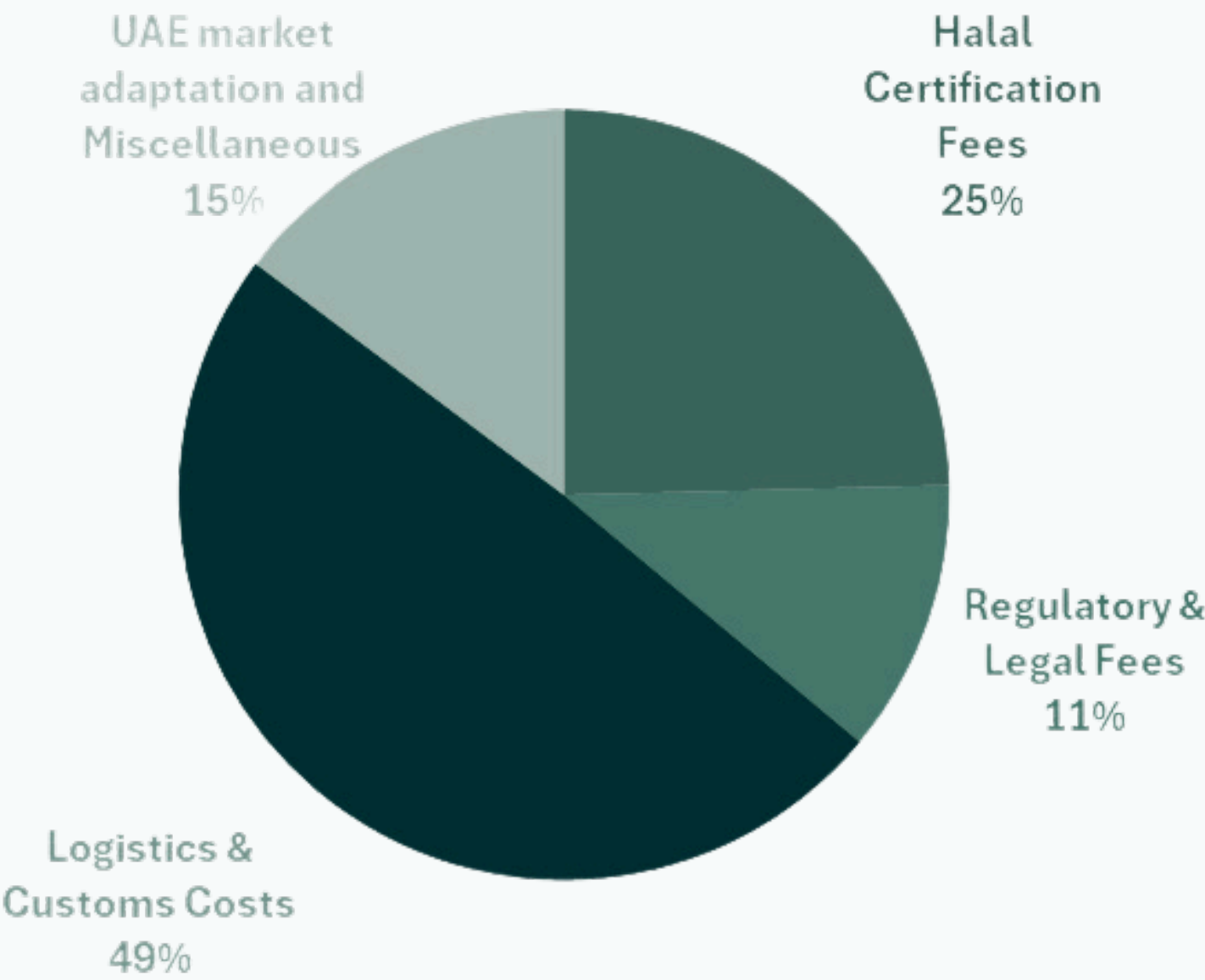
Internal assessments to refine approach:

- Tracking sales & performance
- Monitor regulatory changes
- Evaluate partnerships
- Consumer insights

Impact: Strategy stays updated, data driven and responsive to any market changes



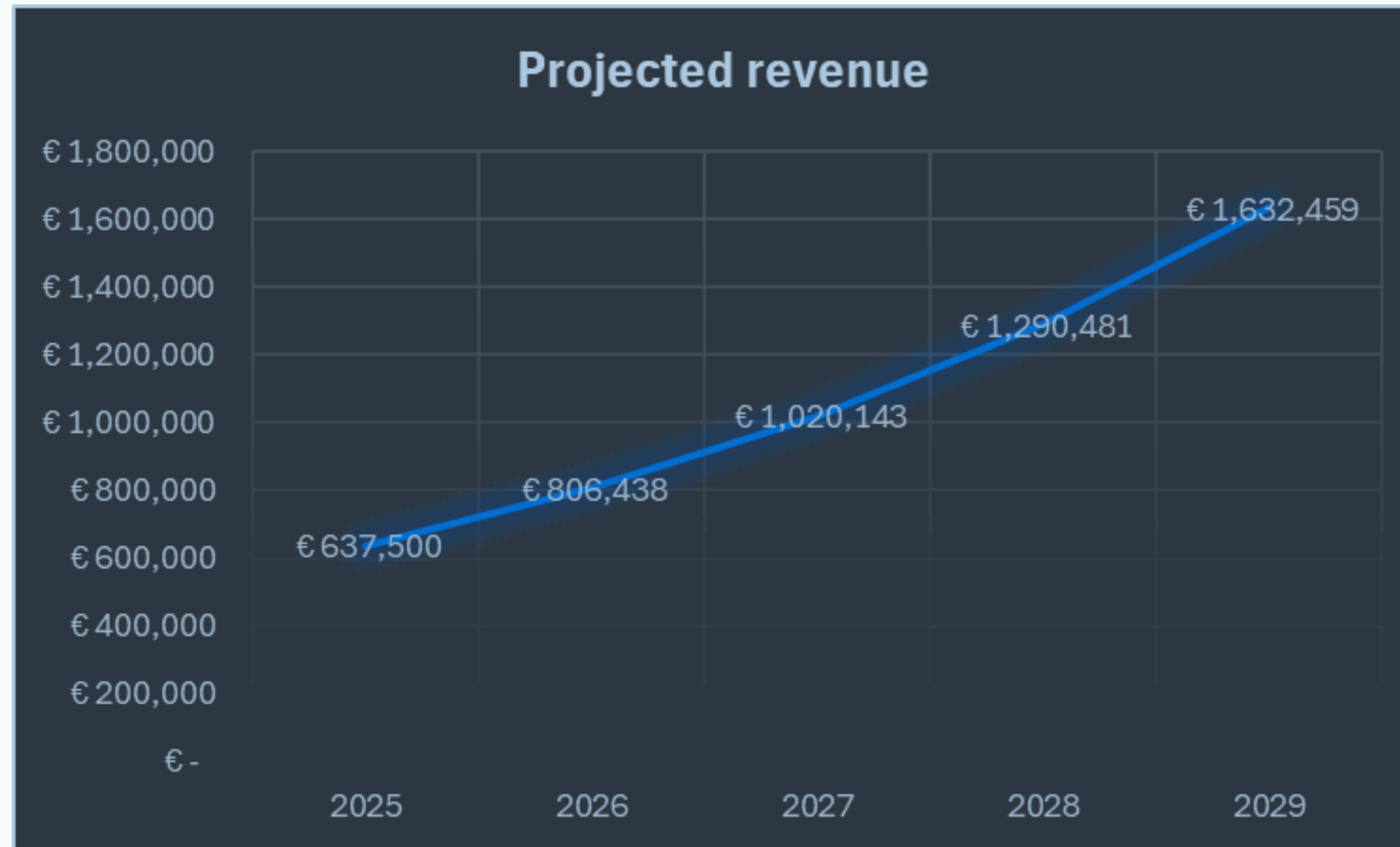
Estimated Budget Breakdown



One -time costs	Euros
Halal Certification Fees (ESMA, IFI, HIA)	€ 15,000
Regulatory & Legal Fees	€7,000
Logistics & Customs Costs	€30,000
UAE market adaptation & Miscellaneous	€9,000
Total	€61,000 to €69,000



Projected Revenue Growth



TRADE:

In 2023 Ireland exported approximately 40 tonnes of beef valued at €0.51 m
In 2022 Ireland exported approximately 105 tonnes of beef valued at €0.57 m
In 2021 Ireland exported approximately 183 tonnes of beef valued at €0.90 m
In 2020 Ireland exported approximately 54 tonnes of beef valued at €0.35 m
In 2019 Ireland exported approximately 20 tonnes of beef valued at €0.38 m
In 2018 Ireland exported approximately 25 tonnes of beef valued at €0.62 m

Projected revenue growth estimate using previous year data

15% annual volume growth and price

Premium pricing due to quality, sustainability and traceability

In the year preceding the ban, exports of Irish beef to the UAE amounted to over 5,200 tonnes and were valued at almost €8.3 million.

Break Even Analysis

Year	Projected volume(tonnes)	Selling Price	Break even volume(Tonnes)
2025	50	€12,750	6.73
2026	57.5	€14,075	5.91
2027	66.1	€15,428	5.24
2028	76	€16,970	4.69
2029	87.5	€18,667	4.22

In 2025, you need to export at least 6.7 tonnes to cover costs. In 2029 only 4.2 tonnes are needed.

The required break-even volume decreases because the price per tonne increases.



Conclusion

Halal Market Transnational Expansion

Entering high-demand markets like the UAE and Southeast Asia through certification partnerships and targeted marketing.

Sustained Growth

Measuring success through KPIs like financial metrics and consumer feedback while scaling through market adaptation & industry collaboration.

Sustainability Innovation

Strengthening the Origin Green program, investing in plant-based alternatives, and improving traceability for sustainability-conscious consumers.

Long Term Growth

Expand Halal Exports to Southeast Asia and promote sustainable production practices. Transition to plant-based meat alternatives in these markets and use Germany as a market entry point in Europe.



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Thank you

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