Sustainable Business Development – a strategic position for internationalization success for 2025 of Irish Agri Food Drink and Marine Industry

Dissertation submitted in part fulfilment of the requirements for the degree of Master’s in Business Administration at Dublin Business School

Rajni Shirsat

Registration No:
10263419
20046

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Declaration: I, Rajni Shirsat, declare that this research is my original work and that it has never been presented to any institution or university for the award of Degree or Diploma. In addition, I have referenced correctly all literature and sources used in this work is fully complaint with the Dublin Business School’s academic honesty policy.

Signed: Rajni Shirsat
Date: 23rd May 2016
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Abstract

This study is on the Irish Agri Food, Drink and Marine Industry and Business sustainability strategies for successful 2025 internationalization.

The study incorporates the FOODWISE 2025, a 10 years strategic action plan by the Department of agriculture, food and marine, Government of Ireland and ORIGIN GREEN Charter, sustainability programme by Bordbia, The Irish Food Board, both incorporating and providing a route map for Sustainable Business development and Strategic Growth for Irish Agri Food Drink and Marine Industry for 2025 export success.

The study provides a detailed synopsis of FOODWISE 2025 strategic growth plan and ORIGIN GREEN CHARTER for Irish Agri Food, Drink and Marine Industry and Organisational strategic growth of the Kerry Groups PLC. And Glanbia PLC. Incorporating the FOODWISE 2025 strategic growth plan and Origin Green Sustainability Program and its perusal in realistic contribution in the internationalization growth strategies for 2025 success.

This study is within the scope of the policies laid down by the government of Ireland for the Irish Agri Food, Drink and Marine Industry and the execution by Kerry Group PLC and Glanbia PLC from farm to fork for internationalization

1. FOODWISE 2025 Predecessor was Food Harvest 2020, a report made in Coordination of Harvard Business School for the department of Agriculture, Food and Marine, Government of Ireland
Introduction:

Ireland is the fastest growing economies in the developed world. The central statistics office of the government of Ireland had forecasted the GDP growth of 4% in 2016 and alluded that private consumption and exports would remain the key drivers of the nation’s economic growth. Agri-Food, Drink and Marine is an indigenous industry in Ireland and it contributes 24 billion per annum to the nation’s economy. (Ireland Food & Drink Report - Q1 2015, 2015). This industry operates to the world class standards to meet the demands of the consumers in the Global Market. Ireland is continuing in accomplishing substantial success in attracting inward investment from overseas companies into its export oriented Agri- Food Drink and Marine Industry.

In the year 2004, the government of Ireland and Harvard Business School developed a coherent roadmap, ‘Food Harvest’ for an Irish Agri Food, Drink and Marine industry, to build the capacity of this industry and increased the adaptability to adapt to the challenges grown in emerging opportunities. The vision was Smart, Green and Growth. The actions were to increase competitive critical mass in the International Market, to get recognition for food producers of Irish Green Market. (Food Harvest 2020’ 2012). The outcome was that new technologies were adopted at primary producers’ level, development of new relations within the food production chain, development in new products stem, enhancement in productivity and competitiveness, development of productions and management skills across the sector and overall contribution of the stakeholders to deliver natural, sustainable produce, incorporating innovative and competitive products developed through increased investment in research and development.

Moving forward, in the year 2015, the department of Agriculture, Food and Marine, Government of Ireland, planned Food Wise 2025, a 10 year vision plan for Irish Food Drink and Marine Industry. Food Wise 2025 and its predecessor Horizon 2020 had combined the capabilities of the agencies such as Enterprise Ireland, Bordbia, BIM, Teagasc and others and had supported the Industry growth. Horizon 2020 is the biggest research and Innovation program offered by the European Union and provides grants for fundamental research and supports innovative business in bringing good ideas to the market and to confront global challenges such as climatic change and public health. (Food Harvest 2020, 2012). Ireland targeted to achieve funding of around 1 billion in research development and innovation.
Food Wise 2025 had identified significant growth opportunities in Dairy, Meat, Prepared Consumer, Seafood, Whiskey, Craft Beer and Horticulture. Food Wise 2025 had put the best step forward to provide innovative food solutions to promote Irish Agri-food, drink and Marine industry to meet the consumer’s demands in the global markets. The projection of Food Wise 2025 is an increase in the value of Agri-food exports by 85% to 19bn euros, in the Agri-food fisheries and wood products sector by 70% to an excess of 13bn euros. An increase in value of primary productions by 65 % to about 10bn euros and the creation of 23,000 direct jobs in Agri-food sector, all along the supply chain from primary production of high value added product development and to sustain, the current market of 175 countries across the globe and develop the potential market for Irish Food exports. *(FoodWise 2025, 2015)*

The department of Agriculture, Food and Marine has set up a state agency, Bordbia, the Irish Food Board, to act on behalf of the department of Agri Food and Marine, Bordbia, is a key player in implementing Food Wise 2025 vision plan. The main role of Bordbia is to act as a link between Irish Agri-Food, Drink Fisheries and Horticulture suppliers and existing and potential customers. Bordbia had introduced ‘Origin Green- Go Green Charter for Irish Agri Food Drink and Fisheries Industry. Origin Green is a bold promise to the world, that Ireland would be a leading source of sustainably produced food and drink, independently verified at every link of the supply chain. Origin Green- Go Green is an only sustainability programme in the world that operates on a national scale, uniting the government, the private sector and the food producers to implement and had enabled the producers, the manufacture, to set and achieve measurable sustainability in the Agri food drink and fisheries business. The Origin Green Charter had aimed to achieve competitiveness at the Farm level, the Industry level, the environmental sustainability level to meet the projected growth potential in the exports of Euros19bn per annum by 2025. *(Origin Green 2012, 2012)*

The focus of this paper is mainly on the strategic position taken by the government of Ireland for Irish Agri food and drink industry for successful internationalisation by 2025 and adoption of Origin Green sustainability model by Irish Agri food and drink and Marine Industry for successful Internationalisation. This paper begins with a literature review 1 on FoodWise 2025, a detail road map stated in Food Wise 2025 by the department of Agriculture, Food and Marine, Government of Ireland, towards 2025 Internationalisation and progresses through the recommendations, emphasising on the industry internationalisation, the development of the market that is, driven by consumer insights and to target the right market, at the right segmentation within those market, productivity improvement driven innovation
and adoption of latest technologies and value addition to sustainably produced primary products and adoption of green energy management to protect the environment and the natural resources. It also continues with the actions stated in the vision plan on the research, development and innovation as key drivers for competitiveness and a central to maintain competitiveness in the long run. It also includes the architecture redesigning, the stake holder’s involvement, to strengthen the country’s resources and development on International business relation and contributions towards the success of Irish Agri-Food Drink and Marine for global exports.

The discussion then proceeds with chapter 2, Literature Review 2, on the internationalization strategies of Large Irish Agri Food and Drink Industry with a Case Study Report of Kerry Groups and Glanbia on Business Sustainability and a journey and strategic decisions taken from inception to current development stage

The discussion then proceeds with chapter 3, Literature Review 3 on the recommendation of Bordbia, through its Origin Green- Go Green Charter for successful Internationalization for Irish Agri Food Drink and Marine Industry. This chapter provides the answer in the form of the recommendations given by Bordbia through its Origin Green-Go Green Charter for Irish Agri Food and Drink Industry for successful internationalization.

Chapter 4 provides a description on Research methodology and methods adopted for this study and its overall application to the study, it provides the questions and they answered gathered for the purpose of this research. It also highlights the strength of this paper and included the weakness of this piece of study.

This study further progresses with Chapter 5 and illuminates the organizational strength and the zoetic determination for 2025 internationalization, It gives the industry decision for the internalization success of business strategies, including Acquisition and Mergers, Innovation, Sustainability, Competitiveness and Branding for 2025 internationalization success of each, Kerry Groups and Glanbia. Continued further on incorporation of Origin Green- Go Green Charter and its implementation success and challenges and its visible movement over impediments for 2025 internationalization success. It also provides answers to Origin Green standalone and as an absorption strategy for present market sustainability and for market penetration in the global markets.

Chapter 6, provides narration and supporting information about the past researchers and their work contributes to the author’s topic. It will take to reverse journey at the beginning of Irish Agri Food, Drink and Marine Industry, the development of the trade from inbound trade to export trade, its early stages and progression of incorporating scientific approaches for industry advancement and progressing on the supply chain management for industry development. This chapter also adds information on the recent insights on food
sustainability from the global perspective the importance of sustainable food production and attitudes of the customers and consumers in the years ahead. Chapter 7 brings into the picture of the global demand for Irish Agri-food Industry and the existing and potential markets. It also studies, strategies adopted by Kerry Plc and Glanbia Plc in the emerging markets and their trends and potential of the Irish Agri food exports to penetrate into the new and upcoming markets and sustain in the existing markets. This further continues and provides insights of the global market demand and emerging trends of customers and customers for food consumption for 2025 and further expands on the country’s food importing policies for food exporters to meet the population’s food demands.

Chapter 8 provides the detail analysis of the purpose of this research along with the detail discussion on the questions and the answered arrived through this study that has contributed to the knowledge. It also brings in the discussions from the stakeholders and the solutions arrived at the gap identified in the research and provides the shareholders and Industry solution for sustaining sustainable business development of Irish Agri Food Drink and Marine Industry to continue with internationalization and success in the global market.

This study is within the scope of Food Wise 2025 and Origin Green Go Green as a sustainable business strategy for large Irish Agri Food Drink and Marine Industry for successful internationalization. It provides a systematic analysis of sustainable business development through the supply chain management from supplier’s level to the manufacturing level to social sustainability level involving Origin Green- Go Green charter and its adoption for business and environmental sustainability. It provides the technological development and advancement in innovation and new product developments and includes, food and diet supplements, from business and expansion perspective. This study projects on the business strategies of large players in this sector for future success and provides the global market demands for future market acquisition and market sustainability. This study is limited to large industry players and do not provide information out of its scope in relation to small and medium size enterprises. Also, this study does not include the foreign players in Agri Food and Drink and Marine industry in the existing market of Ireland and does not cover the scientific research and development in the Agri food sector and its relation to food production. This study maintains a business and the policy angle for the internationalization success of Irish Food Drink and Marine Industry.
Chapter 1: FoodWise 2025

The world food demand would reach to 9-10 billion population by 2050. The increase in food demand is projected to be fulfilled by increased agricultural production through the expansion of agricultural land and improved agricultural production. (*Pete Smith, 2015*)

*Source: UN data from Global Harvest Initiative GAP Report (2011).*

The reputation of Irish food produces relies on high standards and regulation and food safety and the natural green environment. Good practice in business is the right side of regulations and been an enduring source of competitive advantage in global food markets (*Food Industry accountancy Ireland, Oct 2014,*).
Knowing the strength of Irish Food, Drink and Marine industry to the Irish economy and releasing the potential to expand the export growth of Irish Agri food products, the department of Agriculture, food and Marine, Government of Ireland introduced FOODWISE 2025, in the year 2015 to optimise export market growth of the Irish Agri food drink and marine Industry for the next 10 years.
This strategy had outlined the key actions that would contribute to the economic growth and exports, taking into account environmental sustainability over the decade to the Irish economy. This report framed the global contributing factor that would add value for the exports of Irish Agri food products.

Food Wise 2025 projected the International context and focused on the Macroeconomic, EU Framework, International Climate Change Policy, Geopolitical Instability, International Trade Regulatory Environment, Demographics to maximise the export in the international market.

From the national context, Irish Agri-food and drink and marine industry has an expanding global opportunities, growth is in demand for nutritious food, for new products associated with latest consumers trends, green and sustainable reputation. Expansion is also seen in Dairy, Meat, PCF and Sea Food Sectors. Irish Agri food and drink industry has a potential in new Foreign Direct Investments. The industry strength lies in Sustainable Production systems which is grass based, with favourable animal health status, EU single market access, benchmarked industry leaders, research ecosystem and proximity to productive fishing grounds. The industry currently needs to strengthen land mobility, levels of research and development investment by private sector, cost competitiveness, skills gaps, capability and availability all along supply chain, and access to finances. Threats in this industry lies in price volatility, lack of profitability, fluctuation in foreign exchange, distribution in supply chain due to potential diseases or food safety risks, challenging green house and Air emission targets, global competition, bio diversity loss and reduced water quality, and depletion of fish stocks.

Irish Agri food and drink and marine Industry had laid high emphasis on sustainable produce. Ireland is a green land with natural gift of natural resources and favours grass based livestock production system. It harnesses the broad experience, expertise and knowledge of the Irish Agri food. Guiding principle FoodWise 2025 embedded, social, economic and environmental as the three pillars of the sustainability.

The recommendations of FOODWISE 2025 for business sustainability of Irish Agri food and drink Industry were:

- Recognising Agriculture’s role in ongoing National, EU and International Climate change and Energy Policy Development.
- Measurement of Ireland’s environmental sustainability credentials
- Development and advancement of Origin Green Programme at Producers and Industry level
✓ Improvement of Environmental footprint of Sector
✓ Develop and support Agri-food processing sector in delivering sustainable processes and outputs.
✓ Implementation of Environmental Elements of Ireland’s National Programmes and the EU co funded Rural Development Programme
✓ Prioritise Research Funding on sustainability of Irish Food Production
✓ Implementation of 2025 strategy actions in context of sustainability

This report had covered the global expansion with the factors contributing such as Global Food demand, demographics, economic prosperity, Consumer trends, Sectoral Growth in regards to the food products. The overall Irish Agri – food products are segmented as Diary, Meat, Prepared consumer, sea food, Whiskey and Craft beer, and Horticulture.
The report had presented the detail analysis of each subsector of the Irish food and drink industry.

1.1 The Dairy Sector:

In Irish dairy sector, the opportunities predicted was in production expansion with end of milk quotas, the report stated that the sector had good scope to move up value chain with focus on more B2C, IF, ingredients and nutrition products. An increased importance was seen in the third country markets like China, Africa, Gulf, US, with Green sustainable systems allowing for differentiation and branding, The strength of dairy sector is in Low cost grass fed production, low carbon intensity production and sustainability credentials, reputations for world class food safety standards, and access to 130 exports destinations, with high levels of recent investment at processing and farm level, with world class research capability. Opportunities for the development of dairy based foods were seen in the success and in advanced value sectors. Farmhouse, artisans and higher end cheese and butters were predicted to grow with continued recognition, development and encouragement. In the report is was also stated that there is a great scope of continuous pursed against competitive benchmarks.
The areas that requires strengthening are comparative lack of scale at processing level, commodity product mix, and seasonality of production, skills availability, and low rate in land mobility.

The potential treats identified were food safety incident, animal disease outbreak, cross contamination, raw material supply, and extreme price volatility, failure to protect and measure the impact of the natural environment.
Fixed price contracts and financial management skills, volatility tools for the suppliers, equally dairy exporters, and fixed price contracts from the consumer back to exporters.

The immediate actions for Diary sector were:

- All milk producers are strongly encouraged to carry out grass measurement as the efficient use of grass is one of the key advantages of the Irish dairy sector
- Developing Strategies to increase the fertility of Irish grassland soils in order to address deficiencies in P, K and Lime.
- Dairy farmers to set a target of increasing grass utilisation to 10 tonnes/ha
- To continue to leverage the benefits of genomic technology to help maintain the rate of genetic improvement in the dairy sector to maximise resource use efficiency and lower emissions
- Industry stakeholders to ensure that sexed semen continues to be rolled out to Irish dairy farmers and that continued research in the technology is undertaken.

The report presented a developing mechanism and included introduction of mutual funds in form of reinsurance scheme to minimise risk for processor and support farmers to gain confidence for the price of the produce. The report also stated that support from the government for the producers in re-establishing the tax system, taking in account the income volatility faced by the producers, being the start in the supply chain. The report also stated an enhancement in the engagement by processors, producers and the department with the milk market with the Focus on development of value added products ensuring maximum value to the products. The report laid emphasis on coordinating Emissions, water quality and bio diversity and balancing intensive production with environmental concerns.

The global projection for demand for dairy would continue to rise. An increasing growth in the middle class population and there by the consumption capacity would drive a strong demand for dairy protein. Income, urbanisation and working mothers had led to global increased demand for animal protein, including dairy products and infant and toddler formula. This increasing demand for dairy and its products also have given rise in the infrastructure demand for cold storage chains and permit trade in perishable goods.

*(Lagrange, V, Whitsett, D, & Burris, C 2015)*
The global consumption of dairy and its products are seen in Brazil, China, North America and most other industrialised and developing countries of the world. *(FAO, 2012)*

1.2 The Beef Sector:

The report stated that about 1000 farms are contributing to beef production. And Beef accounts for 34% of the gross output of agriculture sector. The report had emphasised on Driving on farm competitiveness with enhanced supply chain interaction and information flows, and building the reputation of Irish Beef in the international market and adding value to this sector through research and development, environment and sustainability. The reported foresighted the growth in protein demand, and thus projected the growth to Irish beef sector by developing a brand image for Irish based on superior attributes to secure additional markets and price premiums. It emphasised on Building Ireland’s reputation for beef production in new markets of USA, Africa, and Asia, particular China which that would absorb increased Irish production.

Irish Beef produce strength lies in Grass reared, welfare friendly production system, specialist suckler’s beef production, cattle and beef traceability systems, credible and sustainable quality assurance scheme, high penetration of high end retail outlets across the EU, strong reputation in traditional markets, capacity and capability to maintain demand.

Immediate actions for development in Beef sector are

- To increase fertility levels and decrease calving intervals in suckler’s herds
- To facilitate the rapid operationalisation of all aspects of the Beef Health Check programme, including batch-level, herd-level and geographic reporting
- To facilitate the further development of resources and information to encourage livestock producers to place an economic value on the biosecurity of their holdings
- To leverage the benefits of the recent adoption of genomics technology in the beef sector to improve the genetic quality of the national breeding herd though inter alia, maximising participation in the Beef Data and Genomics Programme, to help lower emissions and improve farm competitiveness
- To exploit potential of genomics to add value at farm level by improving breeding and at processing level in areas such as meat quality and meat tenderness
This report stated that land transfer, mobility and structural issues needs to be strengthen. Areas such as low profitability at farm level and dependence on direct payments National cost competitiveness, especially utilities and labour, lack of scale across the sector combined with demographic factors, dependency on the UK market and branding of Irish beef is less in emerging and developing markets needs to be addressed. Building Skills at all the levels of supply chain. The report projected, potential threats for beef industry in Impact and animal disease incident, food safety incident, health image of beef products, raw material changes linked to dairy expansion. Failure to adopt carbon efficient practices, potential negative impacts of trade deals, and future CAP reforms.

1.3 The Sheep Meat Sector:

The report stated that the development in Sheep Meat sector would be achieved through Genetic improvement with a focus on eke fertility and on breeding resilience and resistance to disease which impact on the productivity of flocks. And developing consistency of product supplied to processors. To build Work collaboratively with processors, Bordbia, Teagasc and sheep Ireland to modify the seasonal nature of Ireland’s sheep supply and maintain the presence, and access of Irish Sheep’s produce round the year. In this report, the government has clearly laid down actions to improve Ireland’s sheep traceability system:

- Teagasc would undertake a review of their sheep research and advisory programme
- Improving the consumer perception of lamb with the younger demographic as a healthy, convenient protein choice.
- To build a strong image for Irish lamb on its sustainable grass based production to secure outlets and price premium.
- To implement generic promotion of lamb based on its sustainable grass based production to secure outlets and price premium.
- To implement generic promotion of lamb across France, Belgium and Germany and compete for further EU funding post 2017.
- To develop a Carbon Navigator tool for sheep producers.
- To develop strong reputation for quality and environmental sustainability of Irish beef with customers, competent authorities in the target markets.
This report identified the opportunities of developing market for sheep produce through securing new markets in Asia, Africa and North America, due to growing ethnic population, growing demand in China is reduced to NZ imports to Europe. Expand in production range and exploit the image of sheep meat as particular natural healthy product. The strength of sheep produce lies in grass based production systems, good performance, and high net value added product, involvement of breed improvement programmes, integrating various credible and sustainable quality assurance scheme, and achievable positive and environmental impact in Hill and Mountainous areas of Ireland.

This report identified the areas for strengthening the sheep sector and provided assistance support to improve the seasonality nature of sheep supply to round the year availability. It also highlighted the facts that the viability of sheep farming is heavily dependent on direct supports to the producer, and stated that the higher age profile of sheep farmers, and high relatively price point at consumer level, Lack of significant third country markets outside the EU are the gaps that would be addressed through the journey of FoodWise 2025.

The identified treats in the sheep sectors were the food safety incident, disease outbreaks, difficulty to maintain consumption levels, failure to protect and measure the impact on the natural environment.

1.4 The Poultry Sector:
The report stated that the Irish poultry sector contributes to 2% of agriculture sector, contributing to 49m of agricultural output. There are about 250 egg producers. About 85% of eggs consumed are home produced.

The actions stated for development of Poultry sectors in FoodWise 2025 are

- Improved animal health, welfare and bio security. Bringing awareness and implementation through on farm investment and training. Investment in poultry production facilities particularly energy efficiency to reduce input costs.
- To exploit the opportunities afforded by country of origin labelling.
- Consideration of an Industry insurance fund to assist producers and processors in the event of disease outbreak.
- Consideration of development of ‘Chicken complexes’ to allow the industry to operate on a more economic and efficient scale with greater integration and collaboration. Explore opportunities for the increased use of quality assured produce in food service.
- Collaboration with processors to build on commercial opportunities and drive returns from fifth quarter.
To implement the recommendations arising from whole of the supply chain consultation process to address the issue of Campylobacter at farm, processing and distribution levels.

To provide funding under the rural development to up-grade existing buildings and funding to support the construction of new housing to ensure animal welfare and safety.

Examine the extension of country of origin labelling to loose products.

To Invest and strengthen the position of the Quality Mark on the domestic market

To roll out a carbon foot printing assessment and improvement programme for poultry

The opportunities for Poultry sector Market stated was access to China and growing utilisation of fifth quarter and by-products. Global protein markets. Consolidation of poultry sector to complex scale. Food origin labelling of Irish products and developing a competitive advantage in global market with value added production.

The report stated that the Irish poultry sector strength lies in low cost protein in retail and food services markets. Strong domestic market demand for fresh Irish Products. Diverse presence in international markets for by-products for fifth quarter officials. Farm to fork traceability, Bordbia Poultry Credible and sustainable quality assurance scheme for produce quality and branding in global market.

The areas that needs strengthening are cheap imports, it also identified that Irish production is not at its complex scale, and there is over reliance on domestic market. The Feed prices have significant input cost due to import charges, Majority of product in food services sector consist of cheaper imports.

The potential treats identified in this report are competition from imports sourced in Thailand, Uncompetitive input costs. Food safety incidents, Disease outbreaks, Lack of investments at farm and production level, Failure to protect and measure the impact on the natural environment.

1.5. The Pig Meat Sector:

The report stated that the Irish Pig meat industry contributed to 8% of the output value of the Agri-food sector in 2014. There are approximately 440 commercial pig producers producing about 3.5 million pigs annually.

The actions stated in FoodWise 2025 for Pig meat sector were

- Investment in pig production facilities for energy efficiency to reduce input costs.
- Collaboration with the tillage sector to create commercial opportunities for pig manure.
- Explore feasibility of alternately slurry usage and disposal options, such as anaerobic digestion. To explore opportunities for greater use of quality assured produce in food service.
- Engage further with non-intensive sector to ensure standards of bio security and
- Pig meat sector opportunities were seen worldwide; Pigment is the most consumed meat worldwide, potential growth on domestic market, and presence in diverse markets would provide a platform for entry into new markets, and extending markets access to new markets like China with appropriate branding. Development of Pig genetics to develop better breeding stock.

The Strengths identified in the report were availability of Premium quality product with full traceability value added capability, Strong genetic capability, Increased Global demand driven by emerging economics, strong domestics market for Irish Product, Credible and sustainable quality assurance scheme.

The report identified the areas that need to be strengthen were Reliance on important feed means Irish pig sector is a feed price taker, National cost competiveness, energy labour and transport, Margins remains under pressure, Small unit size relative to competitors, Lack of investments access to finance, Animal health issues.

The treats stated in the report were for Pig meat sector are Scale of competitors, Increasing input costs, Food safety incident, Import displacement, Disease outbreaks, Failure to protect and measure the impact on the natural environment.

1.6. The Sea Food Sector:

FoodWise 2025 had set three priorities for Sea food sector

- To expand the raw material base
- To enhance the industry’s structure and skills
- To optimise product added value, export markets and environmental sustainability

Actions stated on FoodWise 2025 were

- Appointment of Commission to independent review of the existing aquaculture licensing system involving all key stakeholders, to identify the current shortcomings and bottlenecks (legislative, resources and logical), to be reported by 2016 and implement necessary changes to the aquaculture licencing.
o To develop a strategy to expand shellfish and aquaculture production taking account of the carrying capacity of bays.

o Develop and initiate practical and competitive measures to attract additional landings into Irish ports and continue to invest significantly in necessary infrastructure at the fishery harbour centres.

o Develop a strategy with practical and implementable actions to significantly increase the quantity of seafood added value across all main species groups. This strategy would complement the strategic plan to deliver scale into the key sea food sector, including food ingredients. This plan also included actions to reduce the produce cost from 70% to 50%.

o Progress participation and engagement of Origin Green with sea food companies with the aim of bringing all sea food companies under this programme.

o To improve the environmental sustainability of the sector including the fishermen, gear sensitivity and replenishment of depleted instore stocks.

o Priorities to Research and Development into seafood based new product development, food ingredients and functional foods. Research in this areas would incorporate both harvested wild and farmed seaweeds and their by-products.

This report stated the sector opportunities lies in an Increasing global demand with supply deficit, ability to attract increased landing into Ireland, Upscale and diverse production, Recovery of Stock recovery through CFP programme

The reported stated the sector strength were in Proximity to key fishing grounds, Strong marine science capability, Good market diversification supported by involvement of Origin Green, and Clean, green image of Atlantic waters,

This report had identified the areas that needs to strengthen were upscaling of small scale fragmented industry to big scale, developing large processing facilities. Continuity in raw material supply, development of poor industry to highly competitive industry and building human capital by management of human resourses and building high skilled leadership for sectoral growth.

The reported stated that the potential treats lied in Stock depletion in wild fisheries, Slowness/ uncertainty of aqua culture licence determination, Sea food safety issues and farmed fish diseases, Failure to scale, diversify, innovate and invest, Failure to protect and measure the impact on the natural environment.

1.7. The Prepared Consumer Foods and Beverage Sector:
The actions stated in FoodWise 2025 were

- Increase Industry expenditure on R & D and innovation by setting a target of a 10% increase in funding per annum.
- Involvement of Government agencies in consultation with the industry to align the definition of PCF and coordinate their approach accordingly.
- To develop a sectoral strategy for food and drink SME’s which sets out supports, targets and best practises for the entry, development and progression of these companies to 2025.
- Continue to work directly with indigenous companies to identify new export market opportunities and develop services and supports for companies to facilitate export growth.
- To implement the competition and consumer protection Bill when enacted.
- To drive greater participation by the sector in the Innovation Voucher and Innovation Partnership programmes.
- Continue and expand the Employment and Investment Incentive Scheme (Enterprise Ireland) and seed capital Scheme to encourage more investment in small PCF companies.
- Bordbia to maximise the use of Origin Green and their quality Assurance Programme to differentiate Irish Produce.
- Continuation and possible expansion of the Foreign Earning Deduction (F.E, D)

The report stated that the opportunities lied in Large EU and wider EMEA market and related scaling opportunities, Development of a centre of excellence in Prepared Consumer Foods/ Horticulture/beverage innovation, growth potential of whiskey and craft beers, Growth potential of Whiskey and craft beers, Agri-food tourism, consumer and market focussed insights and to develop brands and products.

Current strength of the industry stated in the reports were Origin Green, High regulatory and food traceability standards, Iconic drink bands, Blue chip customer base, Processing capability and reasonable scaling potential.

The report had identified the areas that needed strengthening and the areas identified and stated were Over reliance on UK and EU markets, Low profitability and relatively high cost base, cost of route to market, funding and access to cost of credit, low level of innovation investment and product development.

The potential treats stated in the report were Competitiveness, Regulatory and fiscal policies out of line with competitors, small scale relative to buyers and increasing retail concentration, Rise of private labels, increased imports, food
safety incident, failure to protect and measure the impact on the natural environment.

1.8. Areas of Growth.

The Irish Agri Food Drink and Marine Industry expected to deliver the growth for 2025 business sustainability and internationalisation. FoodWise 2025 have identified 4 significant areas of development, The first area was Human Capital, the second one was Competitiveness, the third are was Market Development, and fourth was Innovation.

Delivering Growth through Human Capital Development:

The report stated that the Investment in people, commitment to knowledge transfer that brings technological and process advances to the Industry and recognition and retention of human resources with relevant skills and expertise would be a great area of development.

The report had identified development of greater capacity around marketing and branding with a focus on increasing the number of international marketing graduate’s employed in the sector. Human capital potential would be increased by developing opportunities for industry co-funding/sponsorship so that significant increase in the resources on the ground and to the extended market reach.

Programmes such as BordBia’s fellowship and Origin Green- Brand Ambassador for generating resources and brand building for Global growth would be continued. Training and development would be carried out in in Health and Safety and Language skills for better engagement for graduates coming from degree programmes strategically important to Agricultural science. Food and Nutritional Sciences and Food marketing and Entrepreneurship.

Delivering Growth through Competitiveness
The report stated that the Competitiveness at producer level would be developed through improved profitability and viability of the enterprises is the strategic goal and adoption of latest technologies and processes and improving the financial management capabilities of producers with investments of knowledge transfer and educational support. Competitiveness at processing level, 85% growth are self-evident with attraction and retention of skills and expertee. Application of latest technology, the best financial management expertise, capacity to absorb new innovation, marketing and language capabilities and operational skills, operational skills, technical support, R and D and engineering and technology.

Delivering Growth through Market Development:

In this report, the market actions stated for market development were involvement of Government department and State Agencies to enhance cooperation’s or promoting Ireland’s positioning in emerging export markets. The report also suggested to operate Origin Green Programme as a tool to measure and demonstrate in domestic and global markets. To enhance Ireland’s credentials as a producer and sustainable safe, nutritious and high quality producers. Continue to enhance and support Ireland’s animal health status and reputation for producing safe high quality food. To develop strong credentials in food safety through public private collaborations aimed to anticipate and mitigating new and emerging role to the food chain.

Delivering Growth through Innovation

Research development and Innovation are key drivers of competitiveness and central to maintaining competitiveness in the long term were the recommendation stated in the report. It also further included the involvement of State agencies and research institution to deliver high quality research to Agri food production.

FOODWISE 2025 strategic report is design to enhance the regulatory and administrative environment of the sectoral operations and to facilitate the achievement of sustainable growth potential of all the sub sectors of the Irish Agri food drink and Marine Industry. FOODWISE 2025 is set to optimise the industry contribution to the economy of Ireland and overall well-being.
Chapter 2.

This Chapter proceed on the organisation development of two Irish Agri food drink and Marine Industry giants, Kerry Groups PLC and Glanbia PLC from Inception to present and future determination and business strategies adopted at various stages of development with a focus of Capacity building and Internationalisation success.

1.9. KERRY GROUPS PLC.
Kerry Group Plc. mission statement: To be a world leader in Taste and Nutrition serving the food, beverage and pharmaceutical industries, and a leading supplier of added value brands and customer branded foods to the Irish, UK and selected international markets.

MARKET POSITION
Kerry Group PLC is an Ireland’s largest Food Processing Company by market cap, jumped EUR15.06 (or 25.2%) in the trailing 12 months to January 15, 2016 to close at EUR74.84. Compared with the ISEQ Overall Index which has risen 20.2% over the same period, this is a relative price increase of 5.0%. Average daily volume of 454,021 shares in the trailing year was 1.2 times average daily volume in the previous year. In the trailing 12 months the market cap has jumped EUR2.6 billion (US$2.8 billion). (Kerry Groups plc’ 2015)

Kerry groups PLC was founded in 1972 and had commenced its sustainable growth with reached to current annual sales of 6.1 billion. Kerry Groups has its operations in 26 countries and in five continents. Kerry Group is quoted on the
Dublin and London stock exchanges, with a market capitalisation in excess of €13 billion and some 30,000 shareholders. Kerry groups have grown organically and by adoptions of strategies including Mergers and acquisitions, Market development, Man Power development and adopting Business Sustainability. (*Kerry Group plc* 2015). Kerry Groups Plc. as a global food industry, is positioned as a technologically advanced manufacturers of ingredients and flavours with broad portfolio of 15000 foods and ingredients and operating its business on EMEA, the Americas and Asia Pacific Markets. The broad portfolio enables Kerry to meet the wide range of Customers segments and thus reduces the dependency on a single product line for revenue generation and thus diversifies business risk. Products and Product development.

(*The Kerry Way, 2001*)

Kerry as a global food group has its products developed under two main category, 1. Ingredients and Flavours and Consumers Food. The products developed under Ingredients and Flavours are Beverage systems and flavours, Culinary System and flavours, Diary System and flavours, Meat systems and flavours, Bio Ingredients, Emulsifiers and texturant, Proteins, Lipids, and Cereals systems and flavours. The products developed under Consumers foods are Chilled and frozen prepared meals, Cheese, Dairy Products, Meats and Savoury products.

The Brands developed by Kerry in marketing the products are Denny, Lowlow, Richmond, Walls, Dairy gold, Mattessons, Galtee, Cheestrings, Shaws, Pure, Mr.Brain, Porkinsons, Lawsons, Green, Homeprode, Charleville Cheese, Coleraine, Golden Cow, Easi Singles, Roscrea, and Golden Olive. (*'Kerry Group plc' 2015*)

Kerry has strong alliance with the largest food beverage and nutrition companies. The group has large players like Unilever, Tyson, PepsiCo, Mondelez, International Nestle, Kellogg’s, Mars from nutrition segment, Anheuser-Busch InBev, Diageo and Gloria Jeans from beverage segment. Apart from these strong alliance, Kerry has tie-ups, as customers with private label products with major retailers like Safeway, Tesco, Costa, Wholesale, Lotte and Wall-Mart. Kerry groups also has key alliances with Danone, in the Global Dairy Industry.

Kerry group’s recent acquisitions and merger were Cargille global flavours business providing flavours ingredients and flavours systems for beverage, dairy, sweet and savoury application through its global facilities. General cereals, South Africa based in Argentina providing extended cereals for RTE cereals and bar markets. EBI Cremica, a provider of food coating systems to the food processor and foodservice sectors, Lactose India, based in Mumbai, strengthening the Group’s positioning as a supplier of excipients and systems to the pharmaceutical sector, IJC Fillings, based in Australia, expanding Kerry’ sweet technology capabilities for the ice cream and bakery regional end use markets, Millennium foods LLC based in Indianapolis develops and
manufactures dairy and culinary ingredients for US customers, Griffith de Brasil, a specialist manufacturer of meat system, flavours and texturant system serving value added growth and segments of the Brazilian meat Industry, Big train, based in US, a major global food service branded speciality beverage provider, Angsana Food Industries and Shanghai Angsana, Food Co. Ltd., based in Malaysia and China, customised food coatings and culinary systems business serving food manufacturing and foodservice markets in Asia, Food Spectrum, Australia, a specialist provider of ingredients and flavours and aseptic solutions for added value dairy, nutritional food and beverage markets in the Asia-Pacific region, Orley foods- A south African based sweet ingredients solution provide, Wunnstarr flavour based in the US, an industry leader in savoury flavours with a strong heulgae in chef style culinary flavours development, Junior Aliments, based in Catio Sao, Paula, leader provider of culinary and system and complete solutions to the food services market in Brazil, Patricililk Gilda, a branded providers if sweet ingredients solutions and the fine bakery confectionary ice cream and food services in Turkey and Middle East, Insight Beverages, US based supplier and custom beverage solutions to the food service market in Brazil. Kerry Foods became a leading supplier of major retailer own branded products and a major supplier of branded chilled foods to supermarket groups and to the independent CTN and forecourt sector in the UK and Ireland. (Kerry Group Plc, Annual Report 2013, 2014, 2015)

Across the globe, there is an increase demand for natural and health ingredients and growing health concerns, like obesity, diabetes, hypertension, and chronic heart diseases have encouraged consumers to make a shift in the food towards healthy fat free and no sugar options in processed foods. In the US and European market, about 70% of the consumers purchasing decisions were on the products ingredients. Kerry has a strong research capabilities and through its research, with an investment of 197million euros. Kerry has focused in developing products which are rich in nutritional content and offers nutritional solutions to meet the dietary requirements of the global customers’ needs across all life stages, from Infant Nutrition to child nutrition to maternal nutrition to performance nutrition and dietary requirements. Kerry groups are also meeting the rising demands of private labels products by retailers. As the consumers demand of private label products has increased because of gaining popularity in low margins and generic quality products. The potential treats lies in the rigorous regulations in the national as well as International food regulatory bodies such as US food and drug administration and food and agriculture organisation. As Kerry operates in 140 countries, the group products are susceptible to regulations of each country with constant scanner against food contaminations. Also, with the development of processed food industry, ingredients used for preparation and preservation are in contact check for quality assurance of the processed food shelf life, contaminations and food safety standards at every level of supply chain until consumption.
Apart from the above risk, Kerry also experiences currency risks, as the operations are based in 140 different countries of various continents. Kerry groups had strategically invested in advanced market development with focused consumer trends division and expanded market reach through e commerce and ‘food to go channels’ Kerry Groups also laid high emphasis on innovation. In 2015, Kerry Groups opened a new Global Technology & Innovation Centre with an investment of 197 million euros, in Ireland, with an investment of to serve the Group’s global and regional customers in the EMEA. The main purpose of opening the Global Technological and Research Centre was to develop a one point contact centre for customer’s engagement activities and provide accessibility and visibility to key customers on Kerry Groups overall performance and major development areas including technological adoption and developments, scientific research development, innovation and application expertise including the food, beverage and pharmaceutical business segments. This centre is aimed to serve as the Group’s Global Centre of Excellence for Nutrition and would optimise product differentiation in the marketplace while providing unrivalled speed to market. The centre would provide knowledge support on the dynamics of markets of Kerry products, customer’s lifestyle and the changes and customers preferences in respect to quality, taste and eating habits. This would in turn provide business development through products positioning and value added consumers food offering with continuous growth in International market. *(Euro monitor International – Analysis, August 2015)*

Kerry Groups sustainable business targets were to manage climate change, to drive efficiency in resource use and reduce waste. To develop long and short terms sustainability gains in operations, to deliver brand sustainability strategy plan and to market sustainability, to Leverage Kerry's ingredients & flavours' technology platforms and applications expertise to improve nutritional values of food and beverage products in partnership with our customers, To embed positive nutritional values in product development and innovation programmes aligned to customer requirements, To achieve Global Food Safety Initiative (GFSI) certification of all Kerry manufacturing plants, to Partner with Kerry customers in sustainable sourcing of strategic ingredients. Kerry group had put efforts to sustain and grow the human resources by driving ethical business practices and compliance to Kerry Code of Conduct and ensuring the wages are competitive and all labour standards are fair, equitable and meet or exceed local guidelines. Kerry groups had continue to embrace work force diversity, customer base development and community welfare and development. Kerry groups actively assist community development programmes with a focus on community health and nutrition, entrepreneurship, amenity, community development projects, education sports and arts. Kerry groups is actively engaged in assisting Concern Worldwide in implementing the 'RAIN' (Realigning Agriculture to Improve Nutrition) project in the developing world. *(Origin Green Sustainability Report, 2015)*
1.10. Glanbia PLC.

GLANBIA PLC mission statement is to be one of the world's top performing nutrition companies, trusted to enrich lives every day.

MARKET POSITION: Glanbia PLC, Ireland’s 2nd largest Food Processing company by market cap, jumped EUR4.02 (or 31.6%) year to date in 2015 to close at EUR16.74. This makes the stock the highest riser in the Food Processing sector which is up 31.3% in 2015. Compared with the ISEQ Overall Index which has risen 26.8% YTD, this is a relative price increase of 4.9%. The average daily volume of 701,979 shares so far in 2015 was 1.2 times the average daily volume in 2014. In 2015 the market cap has jumped EUR1.2 billion (US$1.3 billion)

(Glanbia PLC, 2015)

Glanbia was formed in 1997 and was a merger of Avonmore Foods plc and Waterford Foods plc and was known as Avonmore Waterford Group (AWG) and was renamed as Glanbia plc in 1999. Glanbia is a global nutrition company, grounded in science and nature and dedicated to providing better nutrition in the Global market. The company employees over 6,000 people across 32 countries and the products have sales and distribution channels in over 130 countries with an annual turnover of €3.6 billion. Glanbia major production facilities are located in Ireland, the US, the UK, Germany and China. Glanbia business have four segments; Glanbia Performance Nutrition, Global Ingredients, Dairy Ireland and Joint Ventures & Associates. Glanbia is listed on the Irish and London Stock Exchanges. (‘Glanbia plc’ 2016)

GLANBIA PERFORMANCE NUTRITION segment is the number one global performance nutrition brand portfolio comprising of Optimum Nutrition, BSN, Isopure, thinkThin, Nutramino, ABB and trusource with individual brands and essence. Glanbia aims to inspire its consumers across the world to achieve performance and healthy lifestyle goals and are market leader in Innovation and new product development.

GLANBIA NUTRITIONALS segment is focused on both dairy and non-dairy nutritional ingredients. This segment delivers nutritional and functional ingredient solutions, and precision premixes for use in the nutrition- enhanced mainstream food and beverage markets, infant and clinical nutrition and functional nutrition markets and is large -scale manufacturer and marketer of American-style cheddar cheese.

DAIRY IRELAND segment is comprised of two businesses. Consumer Products and Agri business. Consumer Products is the leading supplier of branded consumer dairy products to the Irish market and long-life products for export.
Agribusiness supplies inputs to the Irish agriculture sector and is the leading purchaser and processor of grain and the leading manufacturer of branded animal feed in Ireland.

Glanbia have three strategic Joint Ventures & Associates, Southwest Cheese in the US, and Glanbia Ingredients in Ireland and Glanbia Cheese in the UK. These three joint ventures are strategically important and add significant value to the wholly owned Glanbia Group.

Glanbia’s performance through inception has contributed in the present success of Glanbia business development.

Waterford Co-op Society, formed in 1964 and Avonmore Creameries, formed in 1966 had a successful merge to increase scale to meet the diversified market demands. A new multi-purpose dairy plant was constructed in Ballyragget, Co. Kilkenny. The plant was at that time the biggest processing facility in Europe. The introduction of European milk quotas in 1984 severely restricted the inbound growth opportunities for Irish co-operatives and their members.

Waterford Co-op Society and Avonmore Creameries realised the need of expansion outside the domestic markets and both these coo cooperatives strategically decided to float in Irish Stock market. Avonmore Foods plc was floated on the Irish Stock Exchange on 6 September 1988 followed by Waterford Foods plc on 6 October 1988. These two floating in Irish Stock Exchange raised capital and enabled businesses to expand their product offerings as well as their geographic footprint. The output expansion resulted in establishment of small cheese plants in the USA.

On 4 September 1997, Avonmore Foods plc and Waterford Foods plc merged to form Avonmore Waterford Group (AWG) plc. This led to the formation of the fourth biggest dairy processor in Europe and the fourth biggest cheese producer in the world. In 1999, the business was rebranded and the name changed to Glanbia plc, meaning “pure food” in Irish.

Between 2001 and 2004 Glanbia implemented a significant reorganisation aimed at reshaping its portfolio and providing the foundation for future growth. The strategy adopted was to reduce commodity exposure and focus on higher margin, lower volatility, value added sectors. Glanbia recognised that the health and wellness and demand for nutrition were the future market trends. Glanbia group anticipated growth in business businesses including its hard cheese and consumer meats businesses in the UK. The company expanded with expanding its cheese plants in Idaho, USA and Magheralin, and Northern Ireland. Further, in the year 2004, the company invested $200 million investment in a Greenfield cheese plant in New Mexico, USA in partnership with the Greater Southwest Milk Agency. The first nutritionals acquisition was also announced in 2004 with Glanbia buying Kortus Foods in Germany to form the basis of today’s Customised Premix Solutions business.

Moving further, in the year 2006, the company expanded with another $90 million expansion in 2009. The acquisition
of California based, Seltzer Foods in 2006 combined with Kortus Foods in Germany provided Glanbia with a strong foothold in the premix market. In addition, the company further strengthened by the construction of Greenfield plants in Missouri, USA and Suzhou, China in 2008. Glanbia had been at the forefront of the manufacture and development of applications through its Ingredients Technologies business of whey protein. In 2008, Glanbia acquired vertically integration with the acquisition of a customer, Optimum Nutrition and the acquisition of BSN in 2011, Glanbia had become a leader in the branded sports nutrition sector both in the US and internationally by then.

In 2013, Glanbia reshaped its business into four business segments. This time, the strategy adopted with capital allocation and to optimise value of existing portfolio to continue for momentous global growth. The strategic moved taken by Glanbia after weighting Global Performance Nutrition and Glanbia Nutritionals segments. Glanbia, after combining these two segments created a

The focus of our strategy and strategic priorities is weighted towards our two complementary global growth platforms, Global Performance Nutrition and Glanbia Nutritionals. These two business segments with its dairy expertise, unique market insights and a leader in acquiring and positioning first in the global market created incongruity competitive advantages for Glanbia. (Glanbia Plc. Annual Report, 2014)

Glanbia's growing performance nutrition business, which takes in sports products like protein bars and whey powders, has been built on acquisitions. The company last year made another two transactions - the EUR28m purchase of Nutramino in January and a EUR121m deal for Isopure in October. (CAGE 2015)

Glanbia Product development

Glanbia and a Global Nutritional Company has developed its products under Consumers Products, Global Nutritionals, and Global Performance Nutrition. Consumers Products are Avonmore brand and Kilmeaden (Cheese and Milk), Premier milk, Super Milk, Slimline, Heart Active, Protein and Lactose-free Milk.

Glanbia Nutritionals’ products are American-style cheddar, Parmesan and Gouda, Southwest Cheese.

Glanbia Performance Nutrition (GPN) brands are Optimum Nutrition, BSN, Isopure, thinkThin, Nutramino, ABB and trusource.

Apart from the various acquisitions and merger, Glanbia has research centre for business and consumers insights and for industry innovation. Glanbia unique business activities contributes to business-to-business and business to consumers reach. These activities had created platforms and had help sharpen the focus in its key markets. The business to business segment has enabled to
streamline innovation leveraging an in-depth science, technology and application, convenient formats and key channels. Innovation had played a crucial role in nutritional ingredients area, Glanbia’s continuous innovation growth system and support is expansion of food, nutrition and wellbeing and thus created a unique opportunity for Glanbia for technology driven market led

Glanbia’s sustainable targets is 100% of its dairy ingredients are sustainability sourced by 2020. Glanbia’s Ingredients Ireland works with farmers suppliers for milk quality, animal health and welfare, energy efficiency, carbon emissions, water usage, waste management, bio diversity, health and safety on far. GII has built Nutrients Management Plans in coordination with skilled farmers with a target to maximise grass production from the land and thereby supporting nurturing of healthiest herds that produces the highest quality milk. Glanbia also has a Manufacturing execution system and Glanbia Performance system at all its plants contributing to environmental impact of zero waste and maximum recycling. *(Origin Green, Sustainability Report, 2015)*

GII developed the on farm sustainability and On farm sustainability and quality assurance programme open source to ensure that’s the supply base are meeting the standards set out within the BordBia’s sustainable dairy assurance scheme.

Kerry Groups Plc and Glanbia Plc, are successful in their business to business operations in Ingredients business. Both these companies has a wide range of products, both dairy and non-dairy ingredients, and both operating on the line of consumer’s insights and innovation to meet the changing requirements of fast paced customers base.

A very significant business-to-business ingredients profile and an expanding international footprint are the key parallels behind the Glanbia’s and Kerry Group’s. *(Jack Gorman, 2016)*

**Literature Review 3: Origin Green Sustainability Charter**

Chapter 3

1.11

Irish Agri food drink and marine exports experienced continuous growth from 2009. The industry added 10.5 billion to the nation’s economy and projected to increase by 45% in next 5 years with a long standing quality and reputation.

The global demand for food is projected to increase further by 2.4 billion by 2050. However, land availability, water scarcity and climate change would be a major concern are directly related to food productions.
To meet the global demand for food and to maintain the business and environmental sustainability, the government of Ireland, incorporated sustainability in FoodWise 2025, an Irish food and drink Industry 2025 vision report and formed a programme called Origin Green, managed by Bordbia, the Irish Food board.

ORIGIN GREEN is a national sustainability programme for Irish Food, drink and marine Industry and was launched in the year 2012. It is the only sustainability programme in the world operating on a national scale. This programme operates in coordination with the government, the private sector, the food producers through Bordbia, the Irish Food Board. Origin Green is a bold promise to the world that Ireland would be a leading source of sustainably produced food and drink, independently verified at every link of the supply chain. This Programme operates on 5 pillars; 1. Lowering Environmental footprints by prioritise emissions, biodiversity, and water quality. 2. Pursing innovative solutions through collaborations. 3. Enhancing the Impact on Society. 4. Creating Showcase for sustainability at home and completing supply chain from farm to fork. 5. Communicating the Story of Origin Green and reaching out to consumers at home and overseas. The Origin Green Programme runs on The Origin Green Sustainability Charter developed by Bordbia. It seeks to demonstrate the commitment of Irish food and drink manufacturers, both large and small, to operate in the most sustainable manner possible. The purpose of this charter is to demonstrate the sustainable credentials of individual Irish food and drink manufacturers and to enhance the reputation of the Ireland as a source of sustainable produced food and drink products. The Origin Green programme runs in coordination of various government state agencies, they are Animal Health Ireland, Bia Food Initiative, Bird Watch Ireland, BIM, Department of Agriculture, Food and Marine, Enterprise Ireland, Environment Protection Agency, Food Authority of Ireland, Irish Cattle breeding Federation, Irish Cooperative Organisation, Irish Creamery Milk Suppliers Association, Irish Dairy Industries Association, Irish Famers Association, Meat Industry Ireland, National Bio diversity Data Centre, Repack, Teagasc, University College of Dublin. The international coordination are with, Carbon Trust, SGS, Sustainable Agriculture Initiative Platform and Dairy Sustainable Framework.

The Origin Green programme provides structure that allows Individual companies to communicate key sustainable issues, sets targets and regularly report progress in achieving short, medium and long term goals. The sustainable charter for an Individual company includes plans and targets under the three actions areas, they are Raw Material Sourcing, Manufacturing Process, and Social Sustainability.
Raw Material Sourcing

Sourcing is a key area of sustainable strategies and targets are in maintaining the sustainability of supply chain. Companies are sourcing from suppliers with recognised certification in terms of Quality Assurance or broader sustainability measures. The sourcing continues with the suppliers with developing initiatives over a period of time.

Manufacturing Process:

In the manufacturing process, there are 5 areas of consideration. They are

- **Energy**: Energy reduction initiatives and Renewable investments are the core areas in Energy Management
- **Emissions**: The core area is reduction in Green House Gas Emissions
- **Waste**: The core area are Initiatives in reducing packaging and packaging reduction
- **Water**: The core areas are to reduce consumption, minimise contamination and prevent pollution.
- **Biodiversity**: The core areas is development and Conservation of ecosystem on site.

Social Sustainability

Social sustainability captures broader components of Sustainability. The main areas are Health and Nutrition of the products, Company role in their local community and Employee well-being.

The present challenges of ORIGIN GREEN programme to be addressed are:
• Farm Implementation

To increase participation in BordBia’s Quality Sustainable assurance scheme, Market benefits of pursing Sustainable farming practices, linkage of national programme and origin green programme. To encourage adoption of Navigator tools and develop additional tools indicators to incorporate bio diversity, water quality and social sustainability. To consider potential to encourage sustainable farming when revising legislation and to sustainable farming in the development of EU policy. To publicise improving on Farm sustainability practices to international customers

• Farmers Engagement

To communicate the interest among International Customers to visit Irish Farm and sensitize on Origin Green. To recognise individual farmers achievements in adopting Origin Green on Public Platforms. To highlight the potential benefits in relation to farm profitability to be gained from sustainable farming.

The Origin Green Charter is operated with producers and manufacturers with Bordbia and ORIGIN GREEN membership, and with sustainability plan. The goals are laid on short and long term goals and the sustainability plan progresses with reporting and verifications. Sustainability plan documentations, data collection and analysis are submitted to Bordbia for assessment of target achievements and relevant third party certifications. The Origin Green programme drive though the market insight, and, in partnership with industry, and shaping the future in the operating of macro dynamics, consumer trends and food contours and contributing to the commercial success of Irish Agri food drink and marine industry (Making a World of Difference, Bordbia 2015)
4.1 Research Philosophy

The Philosophy of the study is ‘Interpretivism’, and the base of the study is that the business, as a part of the social world is constructed by the people involved in the making of the business. This study is on Sustainable Business Development of Irish Agri Food, Drink and Marine Industry, It studies the strategic path laid down in the FOODWISE 2025 report, by the department of Agriculture, Food and Marine, Government of Ireland and Origin Green Sustainability Charter, introduced by Bordbia, the Irish Food board to maximize global growth of Irish Agri food drink and Marine Industry by 2025.

This study has gathered an in-depth understanding on the pillars of Irish Agri Food and Drink Sector and their contribution in making the significant sector of the Irish Economy to maximum dividends to the economy of Ireland by 2025.

The strong pillars, identified in the research paper are the department of Agriculture, food and Marine, The committee, in making of FoodWise 2025, it consisted the decision makers of each segment of Irish Food Drink and Marine industry and were, Chair: John Moloney, Helen Brophy, Director of Executive Education at UCD Michael Smurfit Graduate Business School, Kieran Calnan, Chair of BIM, Michael Carey, Chair of Bord Bia, Noel Cawley, Chair of Teagasc, Donal Dennehy, Operations Director, Michael Dowling, Chairman-designate, Kerry Group PLC, Eddie Downey, President of IFA, Siobhan Egan, Senior Policy Officer, Birdwatch, John Horgan, Chief Executive, Kepak Alan Jagoe, Progressive farmer, Tony Keohane, Chairman, Tesco Ireland, Kevin Lane, Chief
Executive, Irish Dairy Board, Tom Moran, former Secretary General of the Dept of Agriculture, Food and the Marine Prof Dolores O’Riordan, Director of the Institute of Food and Health (UCD) Terence O’Rourke, Chair of Enterprise Ireland, Siobhan Talbot, Group Managing Director, Glanbia and Secretariat: Department of Agriculture, Food and the Marine, Bord Bia, Teagasc and Enterprise Ireland and et.al. These representations in making of FoodWise 2025, a 10 year strategic plan for Irish Agri food and drink Industry for 2025 internationalization success were the sententious step taken towards its achievement. As the stake holders were the action players of the significantly important sector growth and development, their participation from the stage of planning created significant impact on the planning and formation of the report, as they had brought sector expertee and insights on the strength and weaknesses for the segment, responsible in adding value as per its performance expertee to the industry of execution success for 2025 internationalisation. Thus, FoodWise 2025 was an outcome of Public- Private and Educational bodies’ holistic vision for the growth of each segment and thereby of the Irish Agri food drink and Marine Industry and thereby developing economic growth of the sector and thereby the economy of Ireland. (FoodWise 2025 Report, 2015)

Through this research, the researchers had made an attempt to interpret and analysis the main functioning of the supply chains, responsible for Irish Produce to bring from farm to fork and have gathered value added information that would add value to the very novel area of research in Irish Agri food, drink and Marine industry.

4.2. Research Approach

This study have maintain an inductive approach for the purpose of the research and knowledge gathered were on the arising questions on the success of the Irish Agri food drink and Marine industry with a sustainable business approach for business growth, market differentiation and its permanence.

Build with the in-depth analysis of Plan FOODWISE 2025, and action taken by ORIGIN GREEN, this research have gathered knowledge on the interrogation, Is ORIGIN GREEN, a strategic position for business sustainability of Irish Agri Food Drink and Marine Industry for 2025 Internationalisation. The knowledge gathered, therefore are the contributing pieces of FoodWise 2025, ORIGIN GREEN, Organisational business functioning and Global Market demand to form a rejoinder. Good quality of food and healthy lifestyle are the two important demands of the customers of global market and the rate of customers getting sensitised for quality produce food and the nutritional value for is consumption for health living is significantly increasing. Agri food drink and marine Industry been the strongest industry of Ireland and Ireland gifted with the natural resrouces with a history to produces, on the lines of close to nature, Origin
Green production and the global environment demand to maintain sustainability in business and towards the environment, the mother earth strengthens the position of branding Irish Agri food drink and Marine Industry in the Global market as Sustainably Produce and Origin Green Verified companies providing 100% sustainable food products for consumption.

This study had adopted Case study as a Research Strategy for the purpose of the research and to perceive the overall Industry, the researcher had studied two Industry giants, Kerry Groups Plc and Glanbia Plc. This Case studies had contributed notable information on the overall understanding of the formation of Agri food drink and marine industry, from recent past to the current stages and futuristic growth. It also provided, the strategic decisions taken by these two companies for incorporating recommendations of FoodWise 2025 and Origin Green sustainability model in business functioning and thus adding value to the basic strategies of expansion through Acquisitions and Mergers and blending innovation, competitiveness, market development. Both, Kerry Groups plc and Glanbia Plc are the largest standing entity, holding first and second position respectively in the Irish Agri food drink and marine industry. It also stands as a model of development for the participatory supply chains entity and the other medium sized and small sized entities, flourishing in this Industry and contributors to the Irish Economy and embarking flagships in the International markets on the same strategic positions on business sustainability and Origin Green Produce.

4.3. Research Method:

This study had maintained a Multimethod to gather data on the Irish Agri food drink and Marine Industry sustainable business development for 2025 success. The study has identified the back bone of the Industry, the FOODWISE 2025 Strategy Report and ORIGIN GREEN Charter. The researcher build in a clear action plan for the Irish Agri food drink and marine Industry through a detail study of these two policy documents of the department of Agri food drink and marine. The research also identified the participating organisations, like Bordbia, Enterprise Ireland, Irish Farmers Association and its role in supporting the Irish Agri Food Drink and Marine industry to success in the International exports. The research carried out interviews with the Key participating organisations and gathered data from multi method to build the study.

4.4. Time horizon: Cross sectional

This study had captured the information in the time frame of the research period and the data gathered provides the information on the industry growth, development and the gap that exist in this time frame. This study shows that the FOODWISE 2025 Strategy report is in its infant stage of development, FoodWise...
2025, 2015). ORIGIN GREEN Charter and Kerry Groups Plc. and Glanbia Plc., both been the strategic partner, along with the others, in making of the FOODWISE 2025 strategic Report and are the verified members of ORIGIN GREEN programmes and also the sponsors of the two programme undertaken by Bordbia for developing ambassadors of ORIGIN GREEN to brand Irish Agri food drink and marine Industry world-wide and thus combining together in this time frame to achieve a common goal of sustainable business development for Irish Agri Food and Drink Industry for 2025 success. The information gathered in this study shows the working mechanism for the given time frame and current strategies that are undertaken with the vision on 2025 success.

4.5. Data Collection & Findings

Chapter 5

The research had gathered qualitative data through details study of FoodWise 2025 (FOODWISE 2025, 2015 IRELAND) report and Origin Green Charter (ORIGIN GREEN, 2012 IRELAND).

The researcher had interviewed significant decision makers of Irish Agri Food Drink and Marine Industry. This research had total 5 interviews taken, the participating bodies were Bordbia, the Irish Food Board, Sector Manager, Marketing Initiative, Bordbia Kerry Groups PLC, (Organisational Insights (decision maker and Origin Green Ambassador fellow (origin green implementation level), The researcher had a chance to interview the, Sustainability business manager, Glanbia PLC, Irish Farmers Association, Regional Level (Organisational Perspective and County Level, Farm perspective).

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What are the recommendations of Bordbia to Irish Food and Drink Companies for successful Internationalisation?

What are the Internationalisation strategies of the company for last one decade?

How were the Farming process before the introduction of Origin Green?

What is the role of IFA in developing the Irish Agri Food and Drink Industry for 2025 internationalisation success?
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What are the difficulties faced by the producers while incorporating the Origin Green sustainable produce and what are the major requirements of the farmers to sustain sustainability for long run at producers level.

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Irish Agri food drink and Marine Industry, discussions at various level.

**Sector Manager, Marketing Initiative, Bordbia:**

1. What are the recommendations of Bordbia to Irish Food and Drink Companies for successful Internationalisation?

   The recommendation of Bordbia for successful Internationalisation are adopting Market strategies for Irish exports, targets regions, and Market learning through actual visiting the market and getting acquainted with the players within the Industry and market requirements, cultural differences, VAT and promotions. Irish products current export contributes to 40 -60 % to UK market. It is suggested to target market which is the closest familiarity, and with market opportunities. He further added, Bordbia are working with multinationals who are already internationalised and also with SMES, by providing information about the market. Bordbia works with the companies who are already multinationals. Bordbia also supports small SMES through helping them learn about the new market, the action players within those market. Bordbia supports new exporters by acquainting them with small retailers a distributor’s, helping tie ups with small chains and then eventually building trust and relationships with big chains. BordBia’s suggestions to Irish exporters to grow organically and with multiplier effect.

2. What are the various goals of Bordbia for food and drink industry for 2025 success
The goals of Bordbia for 2025 internationalisation is built on the key areas and on the statement strategy is built on Consumer Insights, People, Talent and Infrastructure development.

Consumer Market Insights, one matrix that’s very important, practical day to day living and part of living and breeding in the new emerging markets. Bordbia supports Consumer insights development programme. Bordbia also runs a Bordbia fellowship programme, Origin Green ambassador programme and European orientation programme for young graduate. Bordbia also has a close contact with Harvard business school and Smurfit business school. For successful Internationalisation, Bordbia is branding Irish Agri food and drink industry with a vision that is underpinned by Origin Green, world first, the unified and galvanised way as put in a Charter and that has put with 99.99 % food producers and manufacturer of Ireland would be certified as Origin Green. The Origin Green model is widely accepted in Business to business, and among the manufacturers and retailers and got a worldwide acceptance in customer and consumer market. Bordbia has offices in Singapore, Middle East, Malaysia, and Shanghai. Strong brand communication, in the digital era and it is the story about what you are and what you do is very important in branding Irish food and drink products. Branding brings loyalty from our consumers and we would not like to position ourselves in the premium market and we do not want ourselves to seen as a commodity products.

3. What are Bordbia views on the below strategies as an Internationalisation strategies of Irish Food and Drink Industry


Market research, is the import export capacity of the country, we develop an information guide on who are the keep players who can facilitate in the retailers, distributors. We send our representatives to live in and understand the day to day living, the culture, the legislation of the country and that provides the information for market penetration and growth. Apart from this, every three years we bring Buyers and Irish companies and business and trade and organise Expedite meetings and this business events has potential to bring business partners looking to connect and expand in segmentations and with the industry for internationalisation.

In the areas of Research and Innovation, the main focus in Consumer’s point of view. We have consumer insight centre, We look at the macro level issues, what were the issues sugar, gluten, obesity and 2016, are already mentioned and they are the topic are today and the consumption of food and the consumers and customers . We are constantly doing periscopic research. We bring companies,
Irish companies and fix trade shows, we believe that it advisable to unplug from what we are doing and to see to what you do to see what is complete different to develop the potential in the consumers market.

Human capital is significantly important and as said earlier we have Bordbia fellowship programme, Bordbia Ambassador Programme, running and then in are the representatives and function as brand ambassador in International markets.

Branding

Our ambition is we want Origin green as an Intel of Irish Food and Drink Industry and our philosophy and we want to create and Ireland Ink, because that signature is an industry.

4. Bordbia opinions about Kerry Groups business and its worldwide expansion

Both Glanbia and Kerry are the verified members of Origin Green. The process of being a part of this Journey is to Register Online, Attend Planning workshops, to prepare draft sustainability plan, Bordbia feedback and plan refinement, formal review, submission of Annual progress plan and get the verification to be a part of Origin Green programme.

5. Knowledge from Bordbia that would add value for the research and business success for Irish Food and Drink and Fisheries Sector.

Bordbia would emphasis on building and maintaining the Reputation of Irish Agri food produce and products, understanding the consumers and relationship and trade in business are very important. Our ambitions are tallest and highest and we are sure and building the customers base who can reward our loyalty.

**Agri food, drink and Marine Industry Manufacturers Interview Insights**

1. What are the Internationalisation strategies of the company for last one decade?

KERRY Groups Plc:

The strategies aligns with the mission statement. 1980, dairy co-op was founded, in 1986, Kerry plc was established. Kerry adopted that the Dairy processors diversification strategies. Distribution system for Dairy and dairy protein.

Diversification, Change on financial model with addition of extra capital, Young management team and expansion of Global ingredients and flavours business, now known as Taste and nutrition segment. Kerry brought Technology and Innovation to Food Industry, Worldwide. In Consumers food division, Kerry expanded in ‘Ready to Eat’ products for Ireland and UK. Kerry expanded with
Branding and with tie ups with Super markets chains. Kerry also develop a unique technology and innovation centre.

Glanbia Plc: Our vision is to be one of the world’s top performing nutrition companies trusted to enrich lives every day. Our strategic objective over the last decade has been to refocus Glanbia as a global nutritional company, and this has been achieved through internal growth in our key sectors - through a combination of strategic acquisitions and investment in our own scale dairy operations, as well as divestment of core businesses. Our most recent acquisition has been US business Think Thin.

2. What are the Adoption of FoodWise 2025 and Origin Green, sustainable business as a business strategy for successful internalisation for 2025?

Kerry Plc.

Unique model nationally credited that gives manufacturing the nationwide standardisation.

Glanbia Plc.

We grow our business responsibly whilst acting with honesty and integrity to earn trust and respect. Our vision is to be one of the world’s top performing nutrition companies, trusted to enrich lives every day. A number of our business units have adopted sustainability strategies in the last decade and we are now adopting a broadening sustainability strategy for Glanbia Group. We see sustainability in a social and environmental context as the opportunity to make a difference while at the same time strengthening our business for the longer-term. In Ireland, Glanbia is a founding member of Origin Green – Bord Bia’s sustainability development programme. This is operated on a voluntary basis and is very close to our own so called Open Source’s principles. Origin Green demonstrates the commitment of Irish food companies to operate in the most sustainable manner possible. We are also a founding partner of the Origin Green Ambassador Programme, which promotes the benefits of direct sourcing from Ireland to key global customers.

3. What are the Adoption of FoodWise 2025 and Origin Green, sustainable business as a business strategy for successful internalisation for 2025. Origin Green model fits in the Kerry model. It gives the readymade solution to the mechanism

Measure that make farm, operations, profitable 100 % certification. Kerry Plc. has identified 5 of its sites for on ORIGIN GREEN criteria and certification model.

Kerry Plc. programmes and Origin Green complement each other. Kerry is the sponsor of the Bordbia Fellowship programme and Origin Green Brand
Ambassador programme. Global status and consumer demands been in our sustainable journey. The heritage and the values are practiced in all our operational sites across the world. Customers worldwide and participating and are looking for sustainable credentials

Glanbia Plc.

Over the past decade many parts of the Group have increasingly embedded sustainability thinking and positive action into their activities. Our focus now is to build on this ambition for the delivery of a sustainable business mode - some examples of work completed in 2015 include: Our dairy and feed products are sourced from local farmers - who produce products in line with our demanding quality and sustainability standards. In Ireland we operate the Open Source Sustainability Programme which is more than a milk quality assurance programme, ensuring our milk is of the highest quality and is produced responsibly. Open Source is a programme operated by Glanbia Ingredients Ireland (GII) and is the industry reference point for best practice in dairy sustainability. The Open Source® Sustainability Programme, provides a blueprint for high quality, sustainable milk production, linking the farmer to the end customer. Farmer participants are audited by Bordbia, the Irish Food Board, under the Origin Green Programme.

4. What changes the company have made in the operations to adopt to business sustainability and its success and any further chances and directions on these areas.

Kerry Plc.

Origin Green programme brings discipline to company functioning. It contributes to the eco system and Kerry group’s areas are Utilisation to water conversation, waste management and carbon emission and community development.

Glanbia Plc.

US Farm Programme – This program governs on-farm animal welfare. This programme is third party verified. Understanding the importance of this issue and to recognise Glanbia’s commitment to animal welfare, we adopted the programme in spring 2013 and began the process to ensure all of our dairy farms were FARM certified. One hundred percent of the milk supplied to Glanbia by Idaho and Southwest Cheese farmers was FARM certified in 2015.

IN 2015 we achieved strong environmental results across the Group.

Glanbia Performance Nutrition (GPN) completed eight GPS energy efficiency projects across three sites and has committed to tracking energy efficiency
gains using 2015 base year. Against the backdrop of a 4% increase in milk processing the Dairy Ireland businesses achieved a slight reduction in water and energy usage and decreased waste to landfill by 28%. GII is achieving its Zero Waste to landfill targets and in 2015 recycled more than 600 tonnes of materials. It also won the Origin Green Sustainability award, the Green Food & Beverage award. Our GPN US Office relocated to a LEED (Leadership in Environmental and Energy Design) certified building in Downers Grove, Illinois. The building is Energy Star rated by the United States Environmental Protection Agency (EPA), and is in the top 25% of the most energy efficient buildings tracked through this system and received the EPA’s Energy Star Award.


Kerry Plc.

Kerry group’s plc would maintain the Leadership position in meeting the need of our consumers. We are the Ambassador in providing nutrition to consumers. We have operations in 140 countries and we further aim for business expansion and sustainable business with the government and customers worldwide.

Glanbia Plc.


6. What are the various ways of Supply chain management on the origin green charter and its modification and success?

Kerry Plc:

Production and operations takes a major part on managing the sustainability and therefore, the focus is at the productions and manufacturing level. Kerr Groups maintain close relations with the producers and undergo the Origin Green Journey together to meet the highest quality at all the levels of supply chain management.

Glanbia Plc.

Open Source - Our dairy and feed products are sourced from local farmers In Ireland we operate a milk quality assurance programme, which ensures our milk is of the highest quality and is produced responsibly. Open Source is a programme operated by Glanbia Ingredients Ireland (GII) and is the industry reference point for best practice in dairy sustainability. The Open Source Sustainability Programme, provides a blueprint for high quality, sustainable milk
production, linking the farmer to the end customer. OatSecure - The OatSecure closed loop supply chain process, which has gained NSF certification, was instrumental in OatPure Gluten Free Oats being adopted by key accounts. This rigorously validated process offers an exceptionally high level of protection, and operates to the highest international food safety standards.

**Agri food, drink and Marine Industry Producers Interview Insights**

How were the Farming process before the introduction of Origin Green?

AG. The quality of produce has been the same from long years. What has changed in the incorporation of the recoding and documentation management and the tracing system involved in the overall process of production.

What changes have been introduced in the Farming structure and process through Origin Green?

The introduction is on the traceability, the antibiotics usage and the carbon footprints. There is recoding mechanism, the traceability on the production of the mass and the overall farming practices.

What are the requirement of Manufactures to buy the farm produces?

AG. Tailoring the products, categories of products, and supply at different types of production, grass based, grain feed, cow beef, bull beef, 18 month, 23 months, 36 months. The manufacture demand with a separate system, the Quality production system, it’s the age, the production and the demand and half way to the production cycle, high yielding with good mass and the changes, to favour a different type and the farmers have to match the inconsistency of the productions.

What support the Manufacturers are providing to the producers in relation to meeting the produce quality as recommended by Origin Green?

AG. The dairy standards, the new thing that Bordbia has introduced, the dairy farmers Bordbia had initiated the willingness on the participation of farmers, when they felt that the farmers were ready, then Bordbia provided the assistance. On the other side, once the standard was achieved, Bordbia continuously ask the farmers to progress ahead, year after year.

Currently there is no support system from the manufacturing side to the producers.

How is the engagement of Bordbia, the Irish food board with the producers at Farm Implementation level and Farmers engagement level?

AG. Bordbia had put lot of efforts to organise the meeting and making understand the, lot of farmers consider it has another inspection, the farmers
have lot of inspections in place and the inspection is seen as a way. If the inspection is not successful, it would be great efforts to organise the inspection at the second time. Again said earlier, the benchmark standards are not laid down and it is expected to perform at a bar above the last progress.

How have the process of Energy Management, Emissions, Waste Management, Water Management and Bio diversity taken care at the producer’s level to abide to the standards of Origin Green Sustainable produce.

AG. This is something what we touch earlier as well, the carbon foot print, has made farmers more aware though smarter farming initiatives and made farmers more aware as how they can influence the rain water collection and lower energy efficient footprints. If you are more energy efficient and if you can’t produce more for less, which is good from farmers and for the environment and its drawing their attention to the facts.

What are the difficulties faced by the producers while incorporating the Origin Green sustainable produce and what are the major requirements of the farmers to sustain sustainability for long run at producers level.

AG. Closer working relationship between Bordbia and farmers and benchmarking the standards and you are rewarded for that the farmers don’t see any reward for the quality achieved and The expectation is too much from the farmers to continuous the bars and every time the inspection is there, it is expected to have a bar raised from your previous performance, even though he can be the best farmers in the country. The programme is learning by doing system, it’s more of the organics and the farmers are competing with the own quality and production mechanism year after year.

What is the role of IFA in developing the Irish Agri Food and Drink Industry for 2025 internationalisation success?

JM. IFA is lobby group. The prime responsibility of 2025 lies with the lobby the minister and the officials, farmers understand what their obligations are. IFA support by organising monthly meetings and coordinating with county executives and lobbying the goals of the government and government agencies and marketers, on what is designed too.

What role IFA plays to support the farmers to meet the sustainable produce criteria of Origin Green for products sale to the manufacture.

JM. Lobbying people in supply chain and their focus is achievable and measurable, IFA has a large groups of farmers, and have close working relations. The government can have mass engagement under IFA forum. IFA also have a check on the schemes available for farmers and makes sure these schemes are reaches the farmers and their practices.
What are the current issues associated with the Origin Green quality standards from the producer’s perspective?

JM. The current concerns at the Primary producer’s levels are the age profile of the farmers, as they do not understand the programme. Big issue from the standard been set for the quality insurance.

What role the IFA play for the supply chain management as being the starting point in supply chain.

JM. The standards were disconnect between, Farmers and Bordbia. The farmers needs to take on board and explain that this is now the integrated plan of marketing strategy and Ireland must stay one step one. Higher standard are laid, however, a baseline has not been agreed. A baseline would be that there has to be a good sensible farming practise and a super link, a scheme that disadvantage the farmers.

What is the role of IFA in developing producers and manufactures and other stake holder’s relations for effective channelization of the Irish Agro food produce.

JM. Supply chain management as being the part of regular ways management.

IFA represent the primary producers, it’s easy for the government to have this platform to convey Origin Green perspective. Bordbia has Retailers and Chefs Club members visiting farms.

IFA have regular meetings with Farm Forum, Stake holders meeting and we meet about 3-6 times a year or at the time of crisis.

What is your opinion of the Food Harvest 2020 and FoodWise 2025 from the sustainability development perspective?

JM. Farmers have a strong view among the beef and sheep the dairy sector is and more acknowledgement than the beef and sheep farming. The ministers have too much emphasised on Dairy then other sectors. Majority of the Farmers in Ireland are 45 plus age and Sustainability is a buzz word for them. The Origin Green with the concern on Climate change, Sustainable food production is a very good marketing tools. European primary producers have the standard we produce food, the problem is having composed the regime, as other country can’t have cheaper produce in equivalence standard,

6.1 Data Analysis and Discussion

Chapters 6
Global Demand for FOOD and the Sustainable actions taken in the world before the formation of FoodWise 2025

The world population is forecasted to reach more than 9 billion by 2025. This projection of global food demand with assumption on population growth, dietary shift and bio fuel expansion provides an estimate of the amount of additional food needed to next 40 years. Food Security has been a matter of Global Governance and (Journal of International Law and International Relation, 2015)

The right to food as a value that competes with free trade and trade law must comply with the right to food. (De Schutter and Lamy, WHO, 2015) Also, Internationalisation and exports mechanism for Food Industries are the ways to make the food available to the market demand. The basic drivers for food demand are population, growth, demographic and shifts in the level of composition of diets with income changes and urbanisation, societal changes in attitudes and values and environmental changes affecting food preference. (Keating, BA. Global Food Security, 2014)

The food demand consist of 3 components of Food wedged, reducing food, increasing food production and Sustaining the productivity system of food system

About 46% of the additional food demand is projected to achieve through pathways that increased food production and 34% of the food demand would be
achieve through sustaining the productive capacity and 20% of the food to better management demand.

Current projected food demands raised from over consumption of food with both in developed and developing world. Global estimate suggest that of the population about billion are adults and Million are overweight and 10.0 billion are undernourished (WHO, 2008), out of overweight adults. 200 million women are obese, reducing over consumption and achieving more balanced and nutritious diets and could reduce food demand.

Additional food demand from 2010 to 2050, represented as three conceptual wedges, reflecting different strategies in the solution space.

[Keating, B.A., et.al, Food wedges; Framing the global demand and supply challenges towards 2020, Global Food Security, 2014]

The total of 14 pathways were identified and for meeting the global food demand

1. Path ways that reduces the global food demand

2. Pathways that targets the production gap

   Expanding the land resources use to agricultural production
   Expanding the land resources used to agriculture irrigation
   Expanding aqua culture on land or in ocean
   Closing yield gaps in existing crop or livestock production system
   Developing new farming systems that intensify land water use
Crop and livestock improvement to lift the generic potential

3. Pathways that involve avoiding losses in current and future production potential

Maintaining test and disease resistance and bio security
Avoiding soil and water degradation
Minimising climate change through mitigation that maintains food security
Adoption of climate change that cannot be avoided.

(Keating, BA. Global Food Security, 2014)

In Ireland, the Agri food drink and marine industry had advanced with the adoption of application of scientific knowledge in the Agri Food and Drink Industry and factors that played a significant role in acceptance of scientific technologies for development and advancement at producer’s level for quality and commercial interest. The success of farm animal cloning had an acknowledged potential on financial returns. Its successful applications within the Agri-food sector and its applications to modern day agriculture assures best of commercial returns. Genomic selection has allowed some Irish dairy farmers to select multi-purpose animals on the basis of superior milk production and meat quality, as well as enhanced fertility, calving capacity, beef quality and general animal health. Thus the traces of introducing of scientific knowledge and technology for high quality production at producers level is seen in Irish Agri Food and Drink productions (Murphy C, Insights in animal cloning, 2012)

Two important decisions, passed in the 2002, The European Food Safety Authority (EFSA) in by law (EC 178/2002) with an aim to improve EU food safety, re-build consumer confidence and re-build confidence of trading and in 2008, FDA effectively approved the commercialisation of the food from cloned food had played a vital role in the Agri food production to manufacturing of products to exports

In the era of Climate change, its states that population growth, increased biofuel use and climate change all contribute to greater food insecurity at the global level. Climate change in relation to CO2, fertilisers have greater impact than increased bio fuels (Baldos, U, & Hertel, T 2014).

Scientific methods of production, advancement in technology, incorporation of climate change in Agri food drink and marine industry had enabled the industry to provide sustainable food to meet the global demand of food consumption. Introduction of Food Wise 2025 and Origin Green to Irish Agri food drink and Marine Industry had been a farsighted strategic approach to strengthen the existing practise, to maximise the potential to generate maximum production
with rich quality and incorporating environmental factors at production, manufacturing and other areas of supply chains.

Global commodity chain studies have analysed the positioning of food products in international food chains had identified specific consumer trends. The seasonal nature of supply of food produce had taken over by food imports. Innovations in cooling, conservation and transport technologies added to the round the year supply of food products in the market to meet the consumers demand. Ready to eat Meal, Pre pealed, Pre sliced, and Pre chopped products with multi packaging are getting priority in the consumers market. The market demand is also seen in unknown foodstuffs, demand for novelty had let to innovation in food sector. There is a great demand for food quality, its produce, its environmental impact and trade mechanism. All these are the decision factors for the consumers that led the purchase of food products. Growing importance on packaging and branding has let to increasing resemblance of food industry to fashion Industry. *(Pelupessy, W, & Van Kempen, 2005)*

Supply chain management plays a vital role in the internalisation of Agri food drink and marine exports. Supply chain had developed since 1990, the time Irish Firms had out step for exports in the Global Market. Since then, the increased demands for transportation and warehousing for product storage was realised. It also highlighted the upward curve in the Distribution and logistics from 1995 to 2005 in Ireland for Supply chain management. Supply chain management gained significant importance in late 1990s, and the formation of the chains like Tesco Ireland, Super Quinn, Dunness Store, and SUPERVALU for central distributions for fast moving consumer’s goods (FMGC). The critical success factor of the supply chain were competitive pricing, Supply chain management expertise, dedicated logistics service, Integrated IT systems, Meeting Customers requirement, Loyality of Key staff and Inventory Cost reduction. *(Marie Maxell, 2006)*

Origin Green has incorporated the two significant contributing factors, Sustainable produce and sustainability in the every link of the supply chain of Irish Agri Food Drink and Marine Industry *(Origin Green Charter, 2012)*

Moving forward from the production to manufacturing segment of the Agri Food and Drink Industry, The manufactures plays a vital role to bring the farm produce and make the products ready for exports and finally reaching to the end consumers for production.

The operational knowledge and expertise, to manage risk and return, market development obstacles and foreign restriction and standards are the critical success factor for export growth. External barriers, like governmental policies, current risks and foreign restrictions and standards were statistically significant
at a low level of p. 0.05. The internationalisation of company is shaped largely by the internal barriers, most of which are within the Firms’ control (Eldrede Kahiya, NY 2013).

Kerry Groups Plc. and Glanbia Plc. are the two biggest manufacturing industries of Irish Agri Food and Drink Industry had incorporated strategic mechanism to bring potential export growth to the company in specific and to Agri food drink and marine Industry in General.

Kerry Groups Plc. Strategic pillars are Consumers, Channel, Customer and Geography. Kerry groups proposes to use consumer led insights and innovative technology to develop compelling propositions that delight shoppers in core categories like meat, dairy and meals. Deep rooted technology capacity enables, Kerry Groups to create products that meet the consumer’s trends quickly and that are not easy for competition to replicate. Nutritional snacking, Convenience: ‘quick and easy solutions’, Natural health are the three key growth trends in Consumer trends. To Kerry ensures that Kerry products are readily available to all the Kerry Consumers, across all channels in their shopping locations and stores. Kerry works in close coordination and collaboration with the customers leveraging insights, innovation, and category and customers management to create products that Kerry consumers love to buy. Kerry also runs an active programmes, like food service and leisure to develop relationships with new customers beyond present customer’s base with new and exciting routes to market. Kerry proposes to expand its footprints, beyond UK and Ireland. Kerry would leverage brands and technology into new geographies, to establish defendable position based on competitive advantage, underpinned with consumer insights.

Kerry Strategic Advantage lies as a Technology Leader, Market Leader, and Proven success, Growth Potential, People and Sustainable. As s technology leader, Kerry has unrivalled technology breath, fundamental science and research capability, food science and process expertee and had positioned as an industry leadership in Unique taste and nutrition, Culinary Application and Culinary, global technology and Innovation. Kerry stands as a market leader in Savoury & Dairy, Cereals and Sweet, in proteins supply. In addition, Kerry stands top 5 in flavours, in top 10 block Buster’s drugs and leader in chilled food in UK and Ireland. Kerry has shown consistent in delivering growth targets, since 1986. Current growth is 11% for revenue, 14% for trading profit, 14 % on adjusted EPS, 17% on share price and 17 % on dividends. Kerry’s growth potential lies in unique customer intimacy model, unrivalled Taste and Nutrition capabilities, established and growing developing market position. Kerry has a result driven work culture with management leadership and capacity and Kerry had put high emphasis on talent management and development through Kerry Learning academy. Kerry develops on sustainable business development with
natural heritage and milestone linked performance management and investment in sustainable future. Kerry also is committed in Kerry company-wide initiative to achieve sustainable target.

Kerry Groups 5 year’s sustainable targets laid are

To achieve 100% ISO 14001 approval at all the manufacturing sites, thus achieving 13% reduction in GHG emissions, water use by 7% waste by 12%, compared to base line year 2013 by 2020 and achieve Zero Waste to Landfill where technically feasible in each jurisdiction maintaining Global Food Safety Initiative (GFSI) certification of all Kerry manufacturing sites.

To leverage Kerry’s Taste and Nutrition technology platforms and applications expertise to improve nutritional values of food and beverage products in partnership with the customers of Kerry and to deliver Kerry foods ‘Better for You’ Programme.

To form a partnership with customers in sustainable sourcing of strategic ingredients and to achieve Kerry sustainable raw material sourcing targets with the raw material categories and to ensure 100% of strategic and key supply partners are formalised as members of SEDEX and abide to Kerry Suppliers code of conduct.

To drive ethical business practises and compliance to Kerry Code of Conduct with competitive wages and fair and equitable standard in labour practice with local guideline and ensuing ongoing learning and development of the staff

To assist and actively engage in development programme in Kerry Communities to improve, health and nutrition, entrepreneurship. Amenity/community development projects, education, arts and sports and agriculture sustainability and to continue with Concern Worldwide in implementing the Realigning Agriculture to Improve Nutrition (RAIN), in the developing countries, Kerry Community Lead Projects in each region within Kerry’s operations, Community development programmes in association with Kerry Vanilla Projects in Madagascar. (Kerry Groups Plc. Interim 2016)

Glanbia Plc. Overall strategic growth areas are building excellence in global human resources and talent management, efficient capital allocation and portfolio management, brand building through the foremost performance nutrition brand portfolio and having critical brand and reputation attributes such as quality, integrity, innovation and sustainability, Maximise current strategic market leadership positions and drive to leadership in select segments and markets, Market-driven and technology-led innovation to move up the value chain and deliver well researched patented or branded products, Strong consumer and customers relationships, and Operational excellence to meet
customer and consumer food safety and quality standards. Glanbia core strategic growth is through three core segments,

Glanbia Performance Nutrition generating revenue globally ahead of market growth rate, its driving growth is the existing market across the current, new channels and consumer insight and to acquire complementary brands

Global Ingredients would complete organisational redesigning focused on cheese and nutritional ingredients platform and to develop and scale on value added ingredients system built upon consumer insight, acquiring complementary business.

Glanbia Consumers trends are built on Health and Wellbeing, Active Lifestyle, Easy, convenient and ongoing, Clear labelling

Both Kerry Plc and Glanbia Plc are the successful drivers of Agri Food drink and marine Industry and a role model for other upcoming exporting Irish Companies ready to enter Industry market for successful internationalisation. *(Glanbia Plc. Interim 2016)*

**Chapters 8: Conclusion**

The research prime focus was on the Sustainable business development of Irish Agri Food Drink and Marine Industry and finding an enjoiender on the Sustainable Business Strategy adopted by the department of agriculture food and marine, government of Ireland for Irish Agri Food Drink and Marine Industry and its potential success for Irish Agri Food Companies.

The research limitation was the research subject was newly acquired Business Sustainability programme, wherein Ireland is the first country to acquire in the global market. Therefore, the researcher had reliance on the data that was within the sphere of the Irish Agri Food Drink and Marine Department and no additional information about the sustainable strategies, FOODWISE 2025 and Origin Green and development was available on the global domain. The strength of this researcher was that the researcher had a direct access on the scenarios as, the platforms were available in the peripheral access. This research gave an opportunity to visit Ireland, country side and have a real insights of the base of the strategies formed by FoodWise2025 and Origin Green Charter.

Origin Green Charter and its absorption and all the levels of the supply chain of Irish Agri Food, Drink and Marine Industry and its exports success.

In the year 2012, Bordbia developed an Origin Green Charter, through this Charter, Ireland became the first country in the world to introduce Sustainability programme to its entire food and drink Industry. The Origin Green Charter emphasised on Verified Commitment to Sustainability all along the Supply Chain
of Irish Agri food drink and marine Industry. The origin green programme currently has 470 food and drink manufacturers, and 90,000 farms accounting to almost 95% of Ireland Food and Drink Exports are verified member and registered in this sustainability journey. Origin Green had organised 52 workshops until now, with 500 participating companies in Origin Green Online Platform. This Origin Green Online platform consist of 15% marketing, 16% Environmental and Health Safety, 14% financial/commercial, 28% commercial and 27% senior management professionals. The Origin Green Sustainability measures Food Safety, Food Traceability, Animal Health, Environment, Welfare and includes Energy Management, Water Management, Bio diversity, socio economic development at all the levels of supply chain management of Irish Agri Food Drink and Marine Industry and its sustainable business development and International success. (Origin Green Sustainability Report, 2015)

At the producer’s level, the representatives from Irish Farmers Association confirmed that the farmers are ethically committed to sustainable production. However, the three important factors, production sustainability benchmark at farm level, cost towards documentation and data management on quality of produce and communication on the Origin Green programme, the inspection and at the farmer’s level are the critical factors that are not incorporated in the Origin Green programme and its incorporation is must for farmers to have ongoing sustainable produce.
The representatives from IFA further added that, from the manufacturing side, the producers are facing inconsistency in demand and supply. The representatives conveyed that in the production time frame, the manufacturers often changes their demand on the production at any stage of the production cycle and that creates a pressure to provide the produce at the varied demand, at any stages of production to the final produce for supply to manufacturer.

The county chairman, (Limerick, Ireland) of Irish Farmers Association conveyed that the farmers are positive in incorporating the Origin Green Sustainability at
Farm level, which is a strong contributing factors towards sustainable environment and improving cost efficiency in resources management at the farm level. However, added cost on the quality management in addition to the production cost is a factor that in yet not taken in consideration by the policy makers and the coordination from the manufacturer to provide sufficient value to the farmers for their produce is a grey area for future ongoing success of Origin Green. (Chairman South Leinster, Ireland) representatives conveyed that Irish Farmers Association would take this on the EU platform in near years to sustain farmer’s production mechanism for the survival of the Origin Green programme and the farmer’s livelihood

The origin Green programme had incorporated the programme, wherein only the producers and manufacturers are the part of the supply chain and the other players are yet not considered in the overall programme. In an interview organised with Kerry Plc and in the discussion with Origin Green, Ambassador, It was conveyed to the researcher that the producers and the manufacturers contributes to the major segments of the Industry and the Origin Green programme intended to target the two major segments of Irish Agri Food Drink and Marine industry, The producers and the Manufacturer, at this stage of programme development.

The manufactures are able to utilise the Origin Green as a tool for product development, branding, and market development and export growth. Innovation and Consumer insights are adding further cream to the flow of the exports and the incorporation of that insights are allowing the Irish Agri Food and Drink companies to have product developed that are meeting the newest trends of global consumers demands and bringing an export advantage to the industry. Kerry Groups plc had recently opened an Innovation Centre at Naas, Kildare, Ireland with €100m investment on a 28 acre site. And Glanbia plc performing on the existing research plan of 7000 square foot in Twin falls, ID, USA, a co-development and process optimization facility designed to maximize interaction with customers from ideation to product completion, with space to facilitate new concept development and execution.

Both the manufactures, Kerry Groups Plc and Glanbia Plc are the verified members of ORIGIN GREEN sustainability programme.

Sustainability is the core element within the overall business strategy of the companies. The exports from the Origin Green members have shown an increase from 1.93 billion in the year 2013 to 7.84 billion in the year 2014, with a membership increase growth from 21% to 75 %. Three target areas of Origin Green Sustainability programme, Raw Material Outsourcing, Manufacturing Process and Social Sustainability have achieved the level of progress. Of 122 verified members, 83 were set on the target to source from the suppliers, with
Origin Green recognition certification and 39 were set to develop sustainability initiatives with the suppliers. The sustainability initiatives, included development of Sustainability procurement policy, local sourcing, suppliers training programmes, Animal welfare, and bio diversity action plan. (Origin Green, Sustainability Report, 2015)

Origin Green as a Quality control programme for the Global Food and Drink Industry would add a considerable wealth to the natural resourses and the world wide population and this segment has a great potential for future research.

The Irish Agri Food Drink and Marine Industry, incorporating the FoodWise 2025 strategies and Origin Green Sustainability programme recorded the Global market performance in the year 2015

The Dairy Sector

The dairy exports increased by 4%. The main driver in increase in dairy export was the back of expansion in post quota and higher exports in dairy nutritional powder. UK was the key market for Irish Dairy exports and accounted to one third of the total exports. Exports to other EU markets raised to 8% to reach around 920 million, and accounted to 28% of total trade. The growth markets were Netherlands, Germany, France and Italy, North Africa and the Middle East, Japan and Malaysia. Specialised nutritional dairy powders had shown great demand in the Asian markets with a growth of 25% in volumes.

The Beef Sector

The value of Irish Beef exports showed 6% raised. Trade for fresh, frozen and processed beef raised to 7 % increase at 2.19 billion. The UK was the core market for Irish Beef and contributed to 52% of the export value. Export to US showed a significant improvement with opening of Beef plants. Re-opening of trade with Turkey and exports to African and Asian markets were of great significance to beef exports, due to economic decline, export to Russia was stopped had this had a negative impact to Irish beef exports. Overall, the current volumes have generated 25% to EU exports.

The Pig meat sector

In the Irish Pig meat sector, there was a fall seen by 6% in the year 2015. The available pig meat for export increased to 8% and the export market had fall by 2%. Retail sale in the export market showed mixed trends. The increase is seen as per the products, sausages sale were steady and an increase in bacon sale increased by 2% in retail market. Exports to UK, Other EU countries like, Germany, Sweden, Italy and France shown 2% raise. However, exports in Denmark and Belgium fell by 6%. After UK, China remained the second largest market for Irish Pig Meat. The Russian market for Irish Pig was closed and a
diversion of Pig meat export were driven in South East Asia, Japan and Australia. The Pig meat sector valued to 130 millions to Irish Pig meat exports.

The Sheep meat Sector

The sheep meat export value was 2.59 million. The total value of sheep meat increased by 5%. The core market for sheep meat were the UK and France and accounted to 64% to total exports. Other key markets were Germany, Belgium, Sweden Poland from the EU and Switzerland and Hong Kong. Demand for sheep meat was seen in the markets from Middle East, North America and China. However, there was reduced demand from other Asian countries and complete stop from Russian market.

The Poultry Sector

The poultry export valued at 267 million from the market. The poultry demand increased by 5% in the UK market. Retail sales of fresh and chilled poultry in Ireland increased by 5%. The increase is poultry exports were achieved with the penetration in the market. About 2% of the growth is combined with stability and marginal growth in terms of frequency of purchase and average purchase volumes respectively. UK remained a ground to direct the products to other international market. A high proportion of processed products were further marketed to international markets, with a base from UK. Exports reduction was seen in the markets of France and Netherlands. Export growth was seen from the markets of Africa and Vietnam.

The Prepared Consumers products Sector

The overall exports for prepared consumer’s foods were marginally lowered to 1.8 billion. Dairy enriched powders, baker, chocolates, confectionary and sugar based products and Cooked meats and meat ingredients were in export demand. The UK market contributed for 44% of its total exports with strong retail pressure. Key growth markets were France, Belgium, Scandinavia and Eastern Europe, with the Czech Republic, Africa, Middle East, Asia and South America.

The Beverage Sector

Exports growth in beverage sector reached to 645 million. The demand for beverages are seen from the markets of developing regions. Key growth regions include North America, Africa, Asia, Oceania, UK and Middle East. Whiskey, Crafts, Beer and cream liqueurs were in demand in alcoholic beverages and Juices and Mineral waters.
The Sea Food Sector

Seafood exports recorded growth by 4% with export value of 560 million. The main EU markets were Germany, France, Spain, UK, and Italy. Seafood exports to International markets reached to 140 million and equated to 34% of the total exports. Nigeria, Cameroon, Egypt, Ghana, China, Hong Kong, South Korea and Japan. (Bordbia, Export Performance and Prospects, 2015-2016, Dublin, Ireland)

FoodWise 2025 is at an Infant stage of growth, however the progress of this strategy is growing at a lighting speed and the development are considered in all the sub sectors of Irish Agri food drink and marine industry and would be an area for future research of 5 years success of FoodWise 2025 to Irish Economy.
9. Reflection

The study began at a very first instance on attending a National Conference of Food Drink Industry in September 2015. This conference was attended by all the players of supply chain of Agri food drink and Marine industry and included, the department of Agri food drink and marine, government of Ireland, Bordbia, the Irish Food Board and the small and big manufactures of the Industry and the other supply chain players, consultants and advisors within the Industry.

Through this conference, I was able to get glimpse of the industry operations and its importance to Irish Economy. I had keen interest to progress my master thesis on the lines of Sustainable Business Development. With rigorous brainstorming with my research professor, and with his rich experience, PJ Paul was able to show me the way to arrive on a Topic for my Master thesis.

As the research topic was finalised, I started gathering the industry information through the happenings of the industry. The national conference provided a base as the participating medium and large sized enterprises presented the company’s performance goals. The speech from the Minister of Department of Agri Food drink and marine and Managing Director, Bordbia, brought the importance of FoodWise 2025 Strategic Plan and Origin Green Sustainability Charter to my knowledge of Research.

Progressing further, I developed my networking base, on LinkedIn, to connect with the professionals with the Industry and through Twitter, following the Industry discussions.

I was able to develop relations with the participating organisations, Irish Farmers Association, Enterprise Ireland to meet the people for conducting interviews for my research. Fixing Interviews was a long term process, and getting the representative from Bordbia, Kerry Groups Plc., Glanbia Plc. and Irish Farmers Association, required networking and recognising the best networks and connection to get the personnel’s connected to my research topic.

This research impulse me to adventure the country side of Ireland and visited areas of Cork, Limerick, Galway, Kerry, Kilkenny, Waterford, Wexford, apart from the city life of Dublin. The country is gifted with natural resources, free from pollution, in comparison to other parts of the world and it got me connected and made me a part to be responsibly in safeguarding the valuable resources of mother earth.

Progressing further, on the Literature reviews, three core zones of the Irish Agri Food Drink and Marine Industry. The strategies studied in FOODWISE 2025,
expanded my understanding of the Irish Agri Food Drink and Marine Sector. The insights of the sub sector, helped me to build my depth understanding of the production segments within the Industry. Business Development and Business Growth of two Industry giants, Kerry Group Plc and Glanbia Plc. brought me the organisation foundation, to formation to public limited corporations and how these two industry had played a significant role in developing the FoodWise 2025 vision strategic report, sharing operating and expansion experiences in being a participatory bodies to interconnect the government policies, company strategies and industry vision all together, to strength the economy of the country and embarking the flagship in the worldwide market on the unique brand of ‘Sustainability’. Both these companies, participation in development of human capital though sponsoring the Origin Green educational programme.

The important factor that had contributed to the fast growth of the Industry giants, is the capacity to produce the data based on current trends, on their research sites and accordingly coming up with innovative products to match the current trends, customers and consumers demands and making it available to the consumers in their accessible markets. It’s the ability to produce and bring on the table for the customers, what they are actually seeking. The Industry has also developed penetration in the markets, where the countries announces as self-sufficient in production and have potential market for technology and innovation as a marketing products for such countries. This penetrative approach of the Irish Agri Food Drink and Marine Industry would sustain and stabilise the position as market leaders of the Industry in the global market.

The policy makers futuristic vision and implementation, to speed the economy of Ireland with export growth and creating employment after recession and the industry players determination with strategies on incorporating innovation and market development with the knowledge base on Consumer Insights and speed to provide the best food to meet the consumers’ needs and nutritional demand and the family owned farm culture, with integrated community development, thereby the overall development of the nation brought me in a state to be a part of this Industry and contribute in the similar fashion.

This research had been an insightful experience, complementing to my original analytical nature and business approach on organic development and sustainably responsible in business and personal values. Above all, it gave me a space for my mind and heart to grow, in compatible to the basic living nature on Sustainability.
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