PLMA Tradeshow & Market Study Visit

BORD BIA
IRISH FOOD BOARD

Contents

- Welcome Message
- What is a Market Study Visit
- The Benefits
- Origin Green
- Upcoming Events
- Event Details
- Purpose
- Research Areas
- The Speakers
- The Locations
- Logistics

BORD BIA
IRISH FOOD BOARD

Welcome

There is nothing more enlightening than walking the aisles of French, German, Dutch or UK retailers and imagining those customers picking your product from the shelves. Subsequently taking local product home and critiquing the packaging, ingredient decks and brand messaging to help enhance your value proposition.

Likewise sitting in a German casual restaurant choosing from the menu, experiencing the product and critically assessing how your product would fit in the menu provides both perspective and invaluable insights.

Bord Bia knows the value of being in the market and putting yourself in the consumer shoes as purchasing decisions are made. This cannot be done behind a desk.

We have strengthened our market study visits making them more impactful with expert speakers, visiting an array of retailers and foodservice operators and also providing an opportunity to meet Bord Bia local staff. We look forward to welcoming you on our next market study visit.



Mary Morrissey

Head of Prepared
Consumer Foods Team

BORD BIA
IRISH FOOD BOARD

I am happy to have participated in the MSV to New York last summer. It was time well spent. The visit was really well planned and organised by the Bord Bia team.

The itinerary included a great mix of panel discussion, market knowledge and insights, store visits and a trip to the Fancy Food Show. The trip was a very efficient and useful way of gaining deeper insights to this market.

Aisling Walsh Butlers Chocolates

BORD BIA
IRISH FOOD BOARD

What is the Market Study Visit?

Bord Bia's Market Study Visits are designed to immerse Irish Food, Drink and Horticulture companies to gain a better knowledge of a specific category in a given target market.

Taking time out of the day to day and seeing trends for yourself is undoubtedly one of the best ways to instil innovation into an organisation.

Understanding your target market helps to determine potential customers and recognise where your products best sit within their gaps.





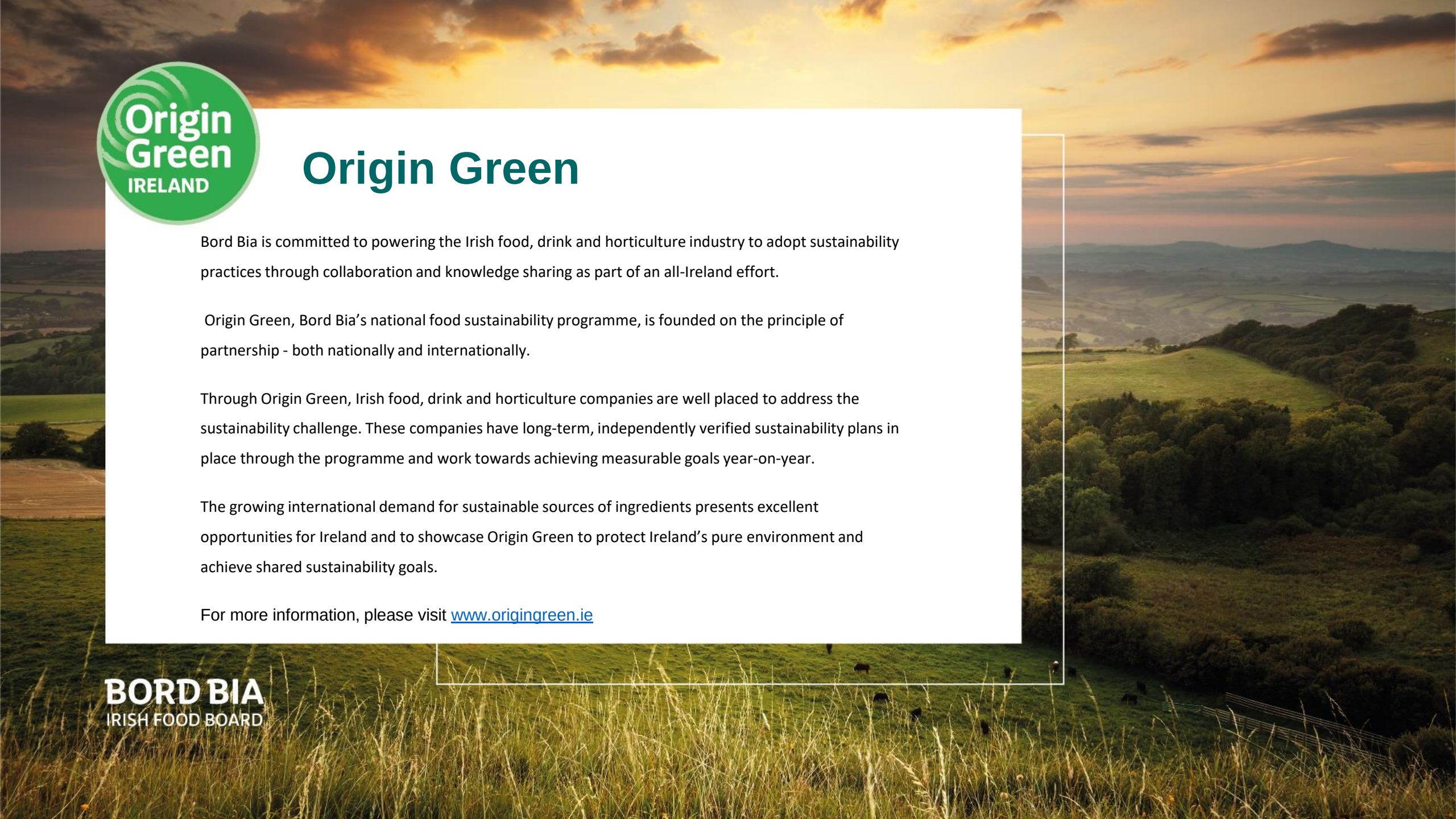
BORD BIA
IRISH FOOD BOARD

The Benefits

- Better understanding of your category in given target market
- Shape perspective of where your products “fit” in target market
- Insight into the opportunities and challenges of a given target market
- Build contacts with other Irish companies and trade contacts
- Witness the latest trends playing out in market
- Instil innovation within your organisation



BORD BIA
IRISH FOOD BOARD



Origin Green

Bord Bia is committed to powering the Irish food, drink and horticulture industry to adopt sustainability practices through collaboration and knowledge sharing as part of an all-Ireland effort.

Origin Green, Bord Bia's national food sustainability programme, is founded on the principle of partnership - both nationally and internationally.

Through Origin Green, Irish food, drink and horticulture companies are well placed to address the sustainability challenge. These companies have long-term, independently verified sustainability plans in place through the programme and work towards achieving measurable goals year-on-year.

The growing international demand for sustainable sources of ingredients presents excellent opportunities for Ireland and to showcase Origin Green to protect Ireland's pure environment and achieve shared sustainability goals.

For more information, please visit www.origingreen.ie

Upcoming Events

BORD BIA
IRISH FOOD BOARD



Bord Bia Customs Clinics

28th Feb - 2nd March 2023

Dublin & Tipperary



Packaging Design Workshop

15th March

Bord Bia Global Hub, Dublin



Negotiation Fundamentals, Theory and Practical Skills Programme 2023

22nd March 2023

Bord Bia Global Hub, Dublin

The German FS Market Study Visit (MSV) organised by Bord Bia in November was very insightful and brilliantly organised; we started with a food safari in Düsseldorf which gave us a much better understanding of the German fast-casual operators, their internal operations and their constraints. Then we had the chance to meet and listen to various Foodservice experts who have years of experience in the German FS market and who were happy to give us bespoke advices and share contacts. And finally on the last day we visited distributors and cash & carry to understand what is the best way to supply the German FS market, and the do's and don't with German distributors. The schedule was jam-packed and Bord Bia made sure every client company would get the most out of this 2 days visit. We will definitely attend other MSVs if Bord Bia organise them again in Germany or other countries in the future.

Alexandra Dirand Ballymaloe

BORD BIA
IRISH FOOD BOARD

PLMA Tradeshow & Market Study Visit

Amsterdam

22nd – 23rd May 2023

Focus on the private label market in Germany, The Netherlands, France and The United Kingdom



BORD BIA
IRISH FOOD BOARD

MSV Summary

Agenda

- **Pre - MSV (19th April 2023)**
- Client Capability training:
- Building Private Label (PL) capability in advance of PLMA via a tailored webinar. **Topics covered:** tendering process for Private Label contracts and latest happening on PL market in context of cost of living crisis. Negotiation training around Private Label.

Day 1

- **10:00:** Introduction and Coffee/ Breakfast
- **10:15 - 11:30:** Private Label (PL) insights presentation from the Bord Bia Dutch, German, French and UK market teams
- **11:30:** Working Lunch
- **12:00 - 14:00:** Bus to three Dutch Retailers (Jumbo, Albert Hein and Dirk) with interesting PL offering.
- **14:00 - 16:00:** The PLMA seminar. Admission to the seminars is complimentary to all registered visitors and exhibitors in possession of a valid "World of Private Label" entrance badge
- **19:00:** Dinner (location TBC)

Day 2

- Full day walking the PLMA tradeshow

BORD BIA
IRISH FOOD BOARD

Please note: all client companies registering for this MSV must buy their own ticket for the PLMA tradeshow https://www.plmainternational.com/trade-show/visiting/registration-visitors





Research Areas



Quality



Health



Sustainability



Innovation

“Private label growth has been happening for a few years, but we've seen some rapid growth in 2022. The biggest driver of this growth has been consumer concerns over inflation and an impending recession.”

Ref: Nielsen IQ https://nielseniq.com/global/en/insights/education/2022/private-label-growth-and-how-emerging-brands-can-compete/#:~:text=Private%20label%20growth%20has%20been,inflation%20and%20an%20impending%20recession.

BORD BIA
IRISH FOOD BOARD

Private Label Landscape

The four Private Label (PL) markets we will be examining on this MSV are the UK, Netherlands, Germany and France. Bord Bia market specialists from each of these markets will present on the PL offering in their markets championing quality, health, sustainability and innovation.

Whilst the retail safari will concentrate on Dutch Private Label, each of these four markets have a highly sophisticated PL offering. Private label products are on average 45% cheaper than A brands (PL Overview, 2020, IPLC).

UK Private Label Market Share	**50.40%**
Netherlands Private Label Market Share	**49.80%**
Germany Private Label Market Share	**48.20%**
France Private Label Market Share	**42.10%**

Figures Ref: PLMA Website, 2021

Incorporated into this MSV will be the two hour seminar from PLMA. Admission to the PLMA seminar is complimentary to all registered visitors and exhibitors in possession of a valid "World of Private Label" entrance badge

BORD BIA
IRISH FOOD BOARD

The Speakers

Danny Bowles
Bord Bia Market Specialist Dutch Market

Marian O'Higgins
Bord Bia Market Specialist UK Market

Emer Carew
Bord Bia International Graduate

Sarah Phelan
Bord Bia Market Specialist French Market









BORD BIA
IRISH FOOD BOARD

We don’t know what we don’t know, and as such, there’s no better way to gain knowledge than getting away from the desk and seeing it for yourself… Bord Bia’s MSVs offer relevant action-focused insight into the opportunities and challenges of your desired market… If you want to shape a better perspective, build contacts or just see the latest trends then these visits are for you…

Joseph Roche Insights Manager, Dawn Farms

BORD BIA
IRISH FOOD BOARD

The Locations

Albert Heijn

Albert Heijn is the leading retailer in the Netherlands with 35.9% market share. There are over 1050 stores in the Netherlands with store formats include standard supermarket, Albert Heijn XL and Albert Heijn To Go.

Why?

- Viewed as an innovator in private label
- Has strong sustainability ambitions for its private label range
- Has an advanced convenience and to-go offering



BORD BIA
IRISH FOOD BOARD

The Locations

Jumbo

Jumbo is the Netherlands second largest retailer, with 21.8% market share. It is a family-owned company with approximately 688 stores in the Netherlands.

Why?

- Historically operated an ‘every day low price’ strategy but in the current climate has recently increased its numbers of promotions
- Has achieved strong growth through private label in last decade
- Has a strong vegan/vegetarian private label offering



BORD BIA
IRISH FOOD BOARD

The Locations

Dirk

Dirk is a member of Superunie, a buying group with 13 members which holds a combined market share of 25.4%. There are about 130 Dirk stores across the Netherlands.

Why?

- Has a number of private label lines
- Uses brands as benchmarks for its private label products



BORD BIA
IRISH FOOD BOARD

The Logistics

Recommended Flight Options

May 22nd : Dublin - Amsterdam (Aer Lingus EI602)

Depart: 06:15 Arrive: 08:55

May 23rd : Amsterdam - Dublin (Aer Lingus EI611)

Depart: 21:40 Arrive: 22:20

Recommended Accommodation

Volkshotel, Wibautstraat 150, 1091GR, Amsterdam

Rooms available from approximately €170 per night

https://www.volkshotel.nl/



BORD BIA
IRISH FOOD BOARD

The London Plant Based Market Study Visit was a fantastic opportunity to get away from the desk and be immersed in the dynamic and ever-changing world of Plant Based. At Kerry, we are monitoring the plant-based market and consumer very closely through proprietary research, but nothing compares to getting out and bringing the insight to life. The discussions with other participants and the Bord Bia team provided rich context and thought starters. I would highly recommend MSVs to companies and brands curious to reimagine how they grow.

David Deeley Insights Manager, Kerry Taste and Nutrition

BORD BIA
IRISH FOOD BOARD

Thank you

Go Raibh Maith Agat

BORD BIA
IRISH FOOD BOARD