Market Engagement

Proving impact

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Regional Manager Europe & North America

January 13th 2023

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Agenda

- 2022 meat exports by region
- Soundbites from the market
- Proving impact
- Building momentum in 2023

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Irish Meat Exports Global

TOTAL EXPORTS

€3.8b

Increase of 15%

BEEF

€2.5b

Increase of 18%

BEEF OFFAL

€134m

Increase of 17%

PIGMEAT

€538m

Increase of 2%

POULTRY

€143m

Increase of 14%

SHEEPMEAT

€476m

Increase of 17%





Irish Meat Exports Europe

TOTAL EXPORTS

€1.8b

Increase of 24%

BEEF

€1.3b

Increase of 26%

BEEF OFFAL

€44m

Increase of 19%

PIGMEAT

€99m

Increase of 23%

POULTRY

€28m

Increase of 31%

SHEEPMEAT

€353m

Increase of 18%





Irish Meat Exports UK

TOTAL EXPORTS

€1.4b

Increase of 15%

BEEF

€1b

Increase of 15%

BEEF OFFAL

€24m

Increase of 80%

PIGMEAT

€93m

Increase of 3%

POULTRY

€85m

Increase of 19%

SHEEPMEAT

€78m

Increase of 15%



Irish Meat Exports International

Excluding EU and UK

TOTAL EXPORTS

€652m

Decrease of 4%

BEEF

€162m

Decrease of 10%

BEEF OFFAL

€67m

Increase of 3%

PIGMEAT

€347m

Decrease of 3%

POULTRY

€31m

Decrease of 7%

SHEEPMEAT

€44m

Increase of 15%



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Soundbites From the Market

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China reopens



ENJOY IT'S FROM EUROPE

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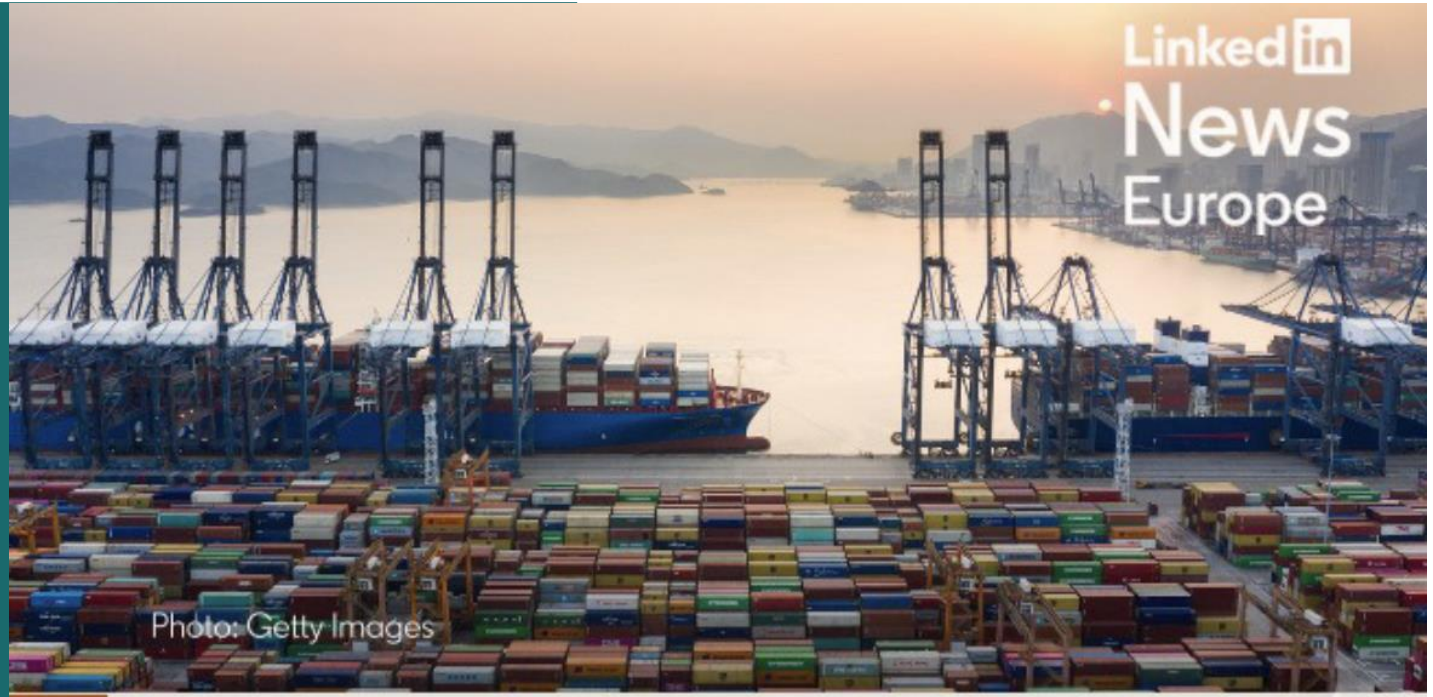

1 Outlook

One third of the world economy will be in recession in 2023: IMF

Climate Change Policies

REUTERS® World Business Legal Markets Breakingviews Technology

COP27

2 minute read · November 30, 2022 5:13 PM GMT+1 · Last Updated a month ago

EU strikes deal to make ships pay for their carbon emissions

By Kate Abnett

Press release | 6 December 2022 | Brussels

Green Deal: EU agrees law to fight global deforestation and forest degradation driven by EU production and consumption

Spain introduces new indirect tax on non-reusable plastic packaging as of 1 January 2023

US Government - the world's largest purchaser - takes a bold step to align supply chain with SBTi



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Irish Beef Brand Health Check 2022

Overview of Results

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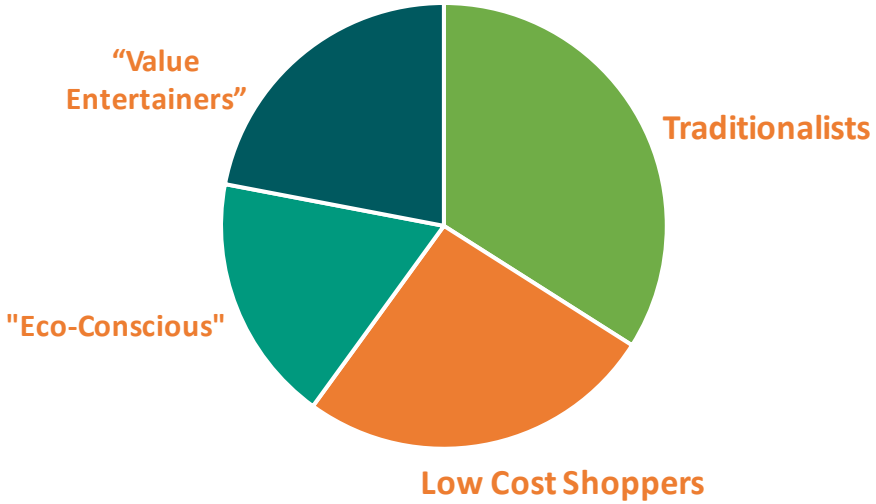
empathy

Segmenting Beef Shoppers



"Traditionalists"

Interested in **origin of food**, that their food is **local**. **Organic** plays a role. While they are **not focussed on low price** they are **not willing to pay more for food which is sustainably produced**.

"Low Cost Shoppers"

All about low price, not focussed on the **origin of their food** as long as it is cheap and tastes good. Not eating plant-based or organic food.

"Eco-Conscious"

Interested in **organic and sustainable food** and its **origin**. **Don't consider price when shopping** and are much more likely to be **entertaining** and interested in cooking/trying out new ideas. **Low price is not on their agenda**.

"Value Entertainers"

Taste and price are key drivers of behaviour currently but are **interested in cooking and entertaining**. **Origin and sustainability** not currently a premium for them.

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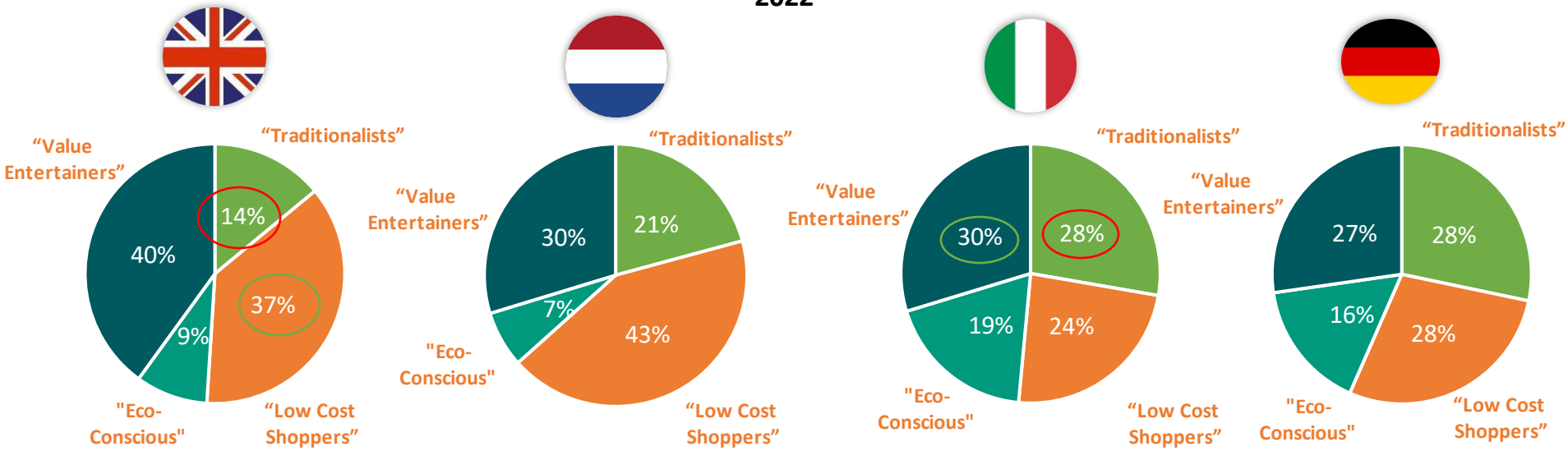
Value and Low Cost Segments Growing

(Base: All adults aged 18+ who purchased beef in the last 4 weeks)

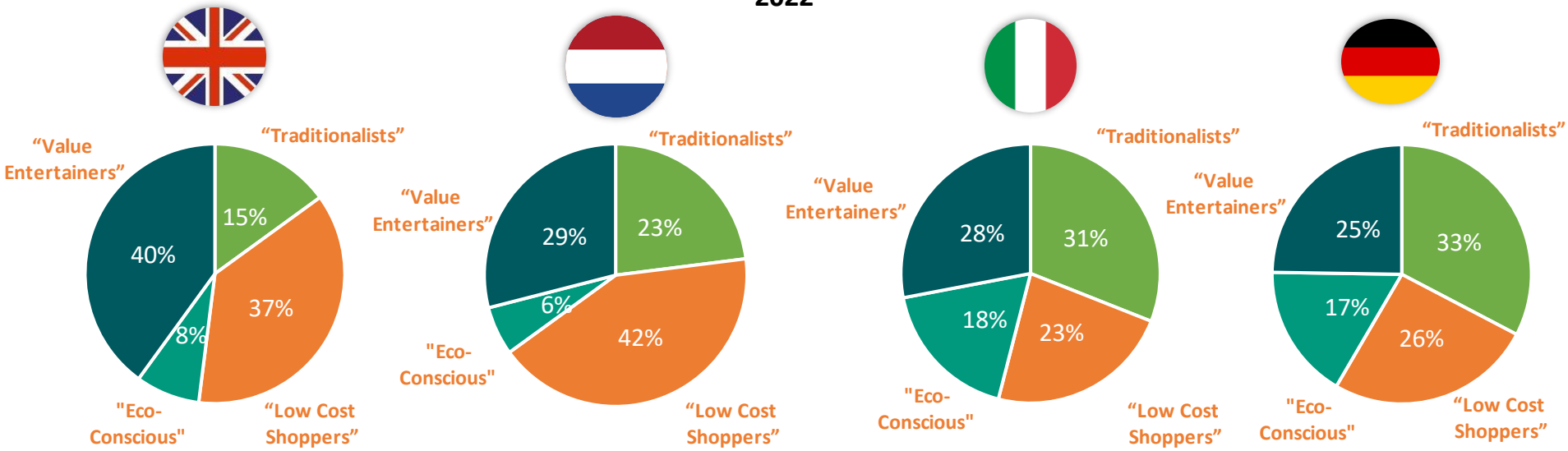
2022



Profile of Irish Beef Shopper by market

(Base: All adults aged 18+ who purchased beef in the last 4 weeks)

2022



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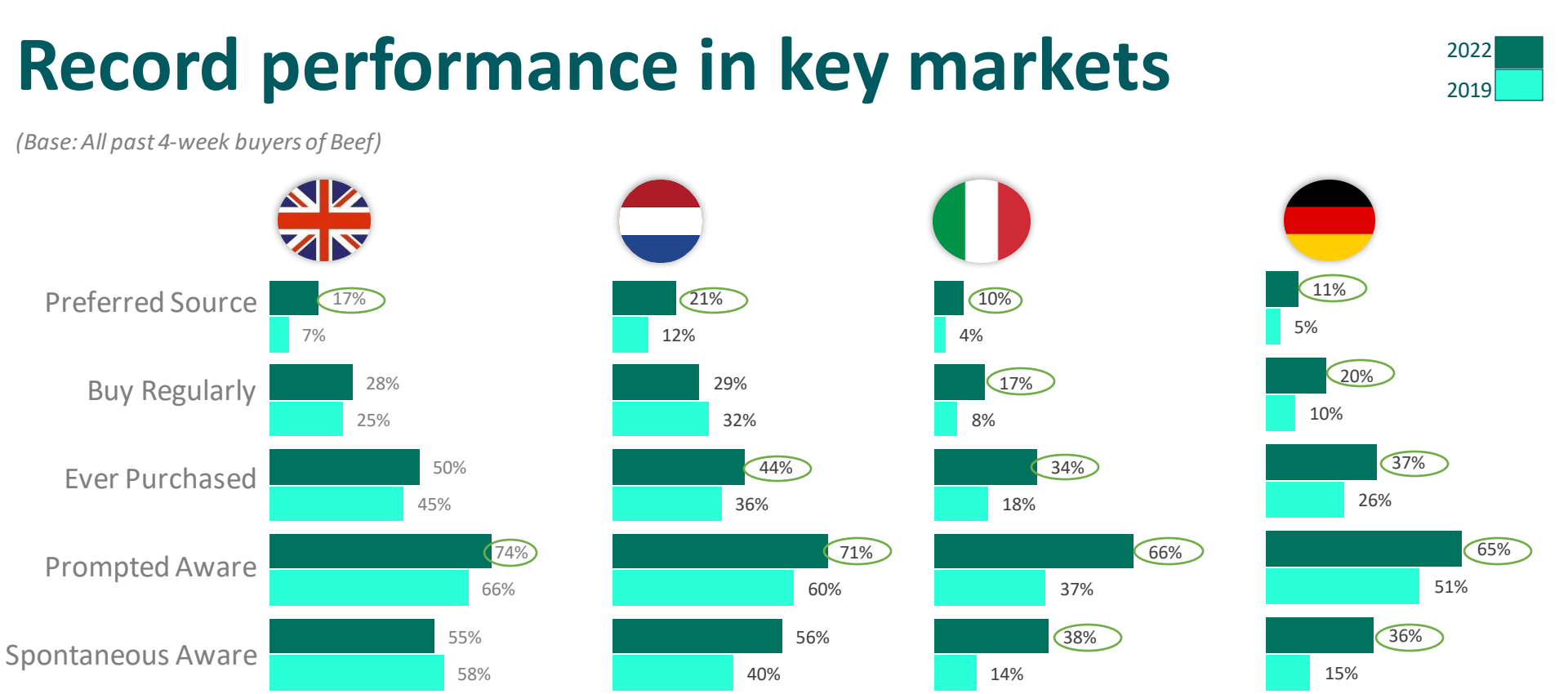
Record performance in key markets



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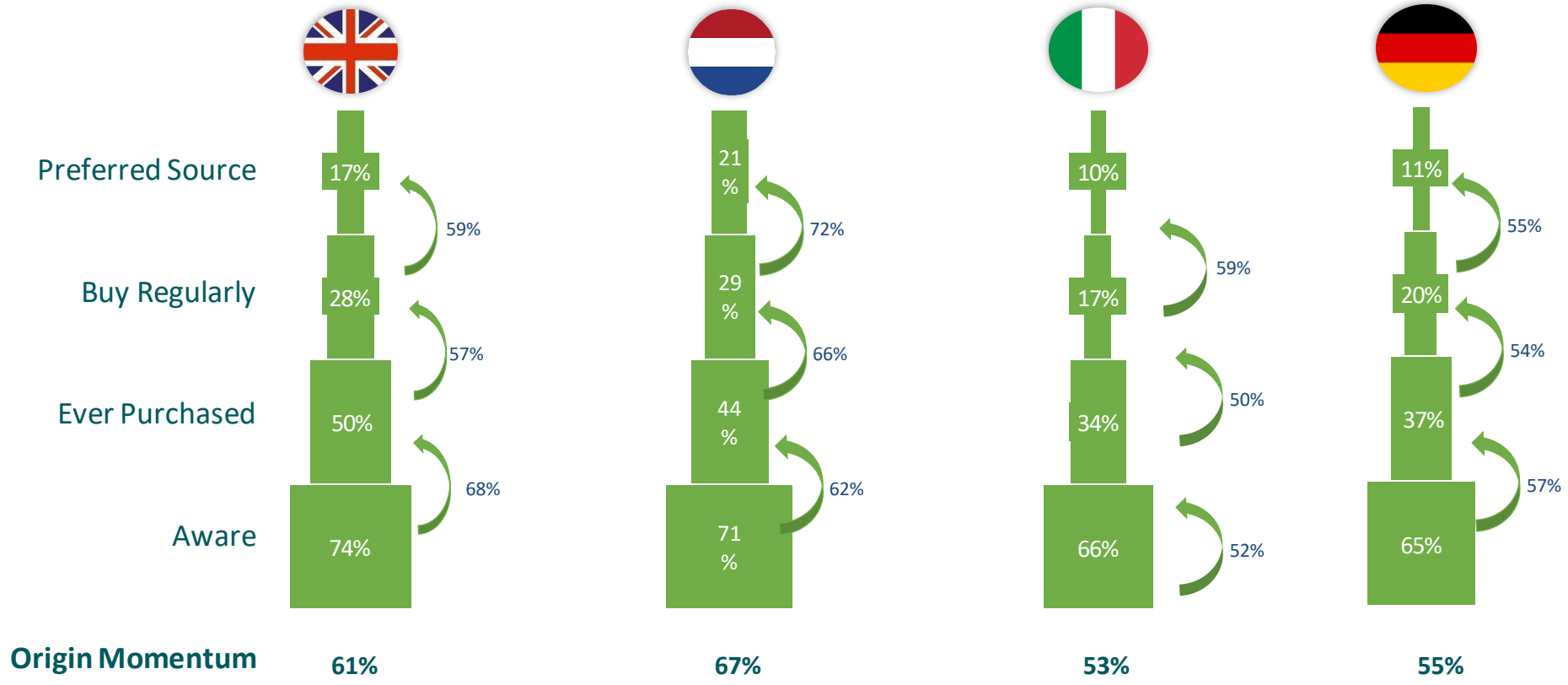

Origin Momentum **61%** **67%** **53%** **55%**

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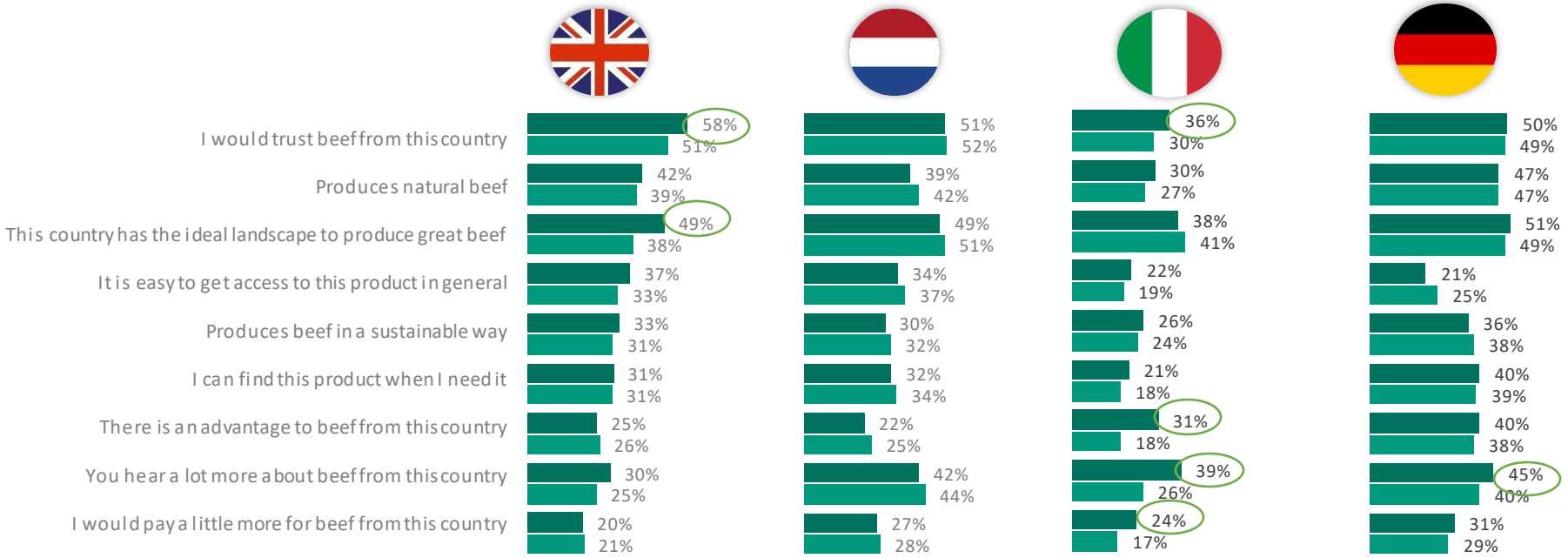
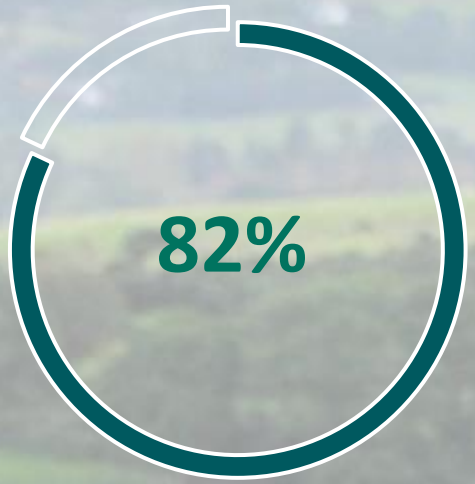
Strong brand credentials

(Base: All past 4-week buyers of Beef)



Awareness of Ireland as a source of sustainably produced food and drink



90% amongst Meat Buyers

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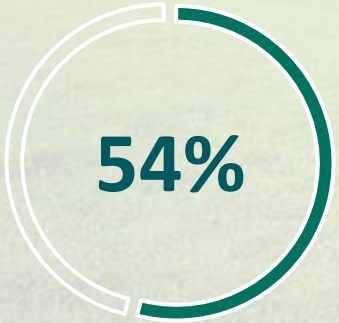
(base: All Survey Participants n=138)

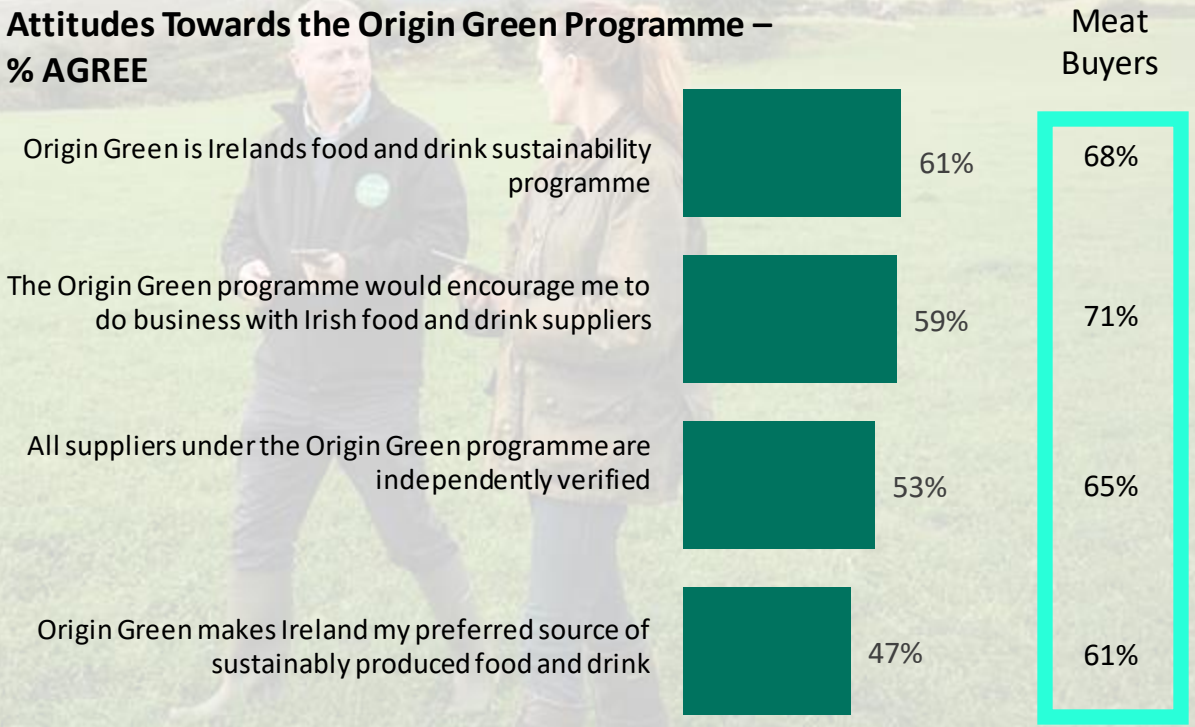
Awareness of & attitudes towards Origin Green

Awareness of Origin Green



65% amongst Meat Buyers

Attitudes Towards the Origin Green Programme – % AGREE



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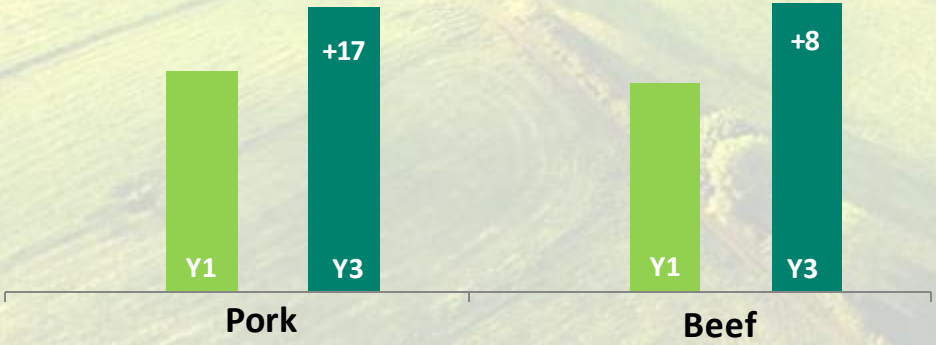
(base: All Survey Participants n=138)

Increase in propensity to purchase Irish Pork & Beef in Korea Republic, Philippines and Vietnam





Increase in Propensity To Purchase	+17%	+8%



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Continuing to build momentum in 2023

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Proof-points driving future value creation



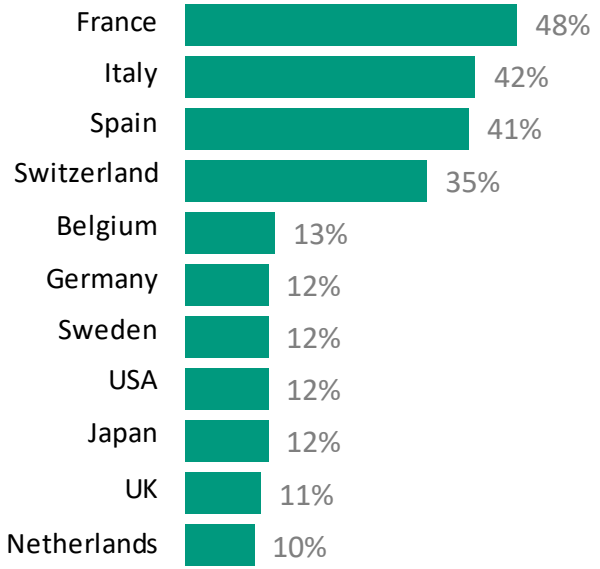






% of consumers familiar with PGI by market

From the following list, please indicate which of the following terms you are familiar with when it comes to purchasing beef - PGI











Outdoor advertising









Shopper marketing















Organic promotions





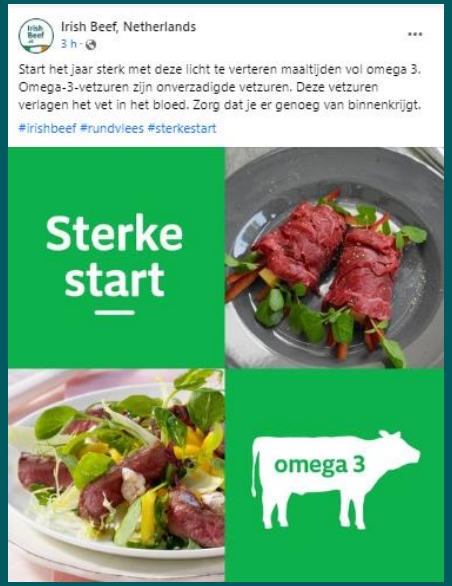




Endorsed by celebrity chefs



Building a global community



330,000 followers

32,000 followers

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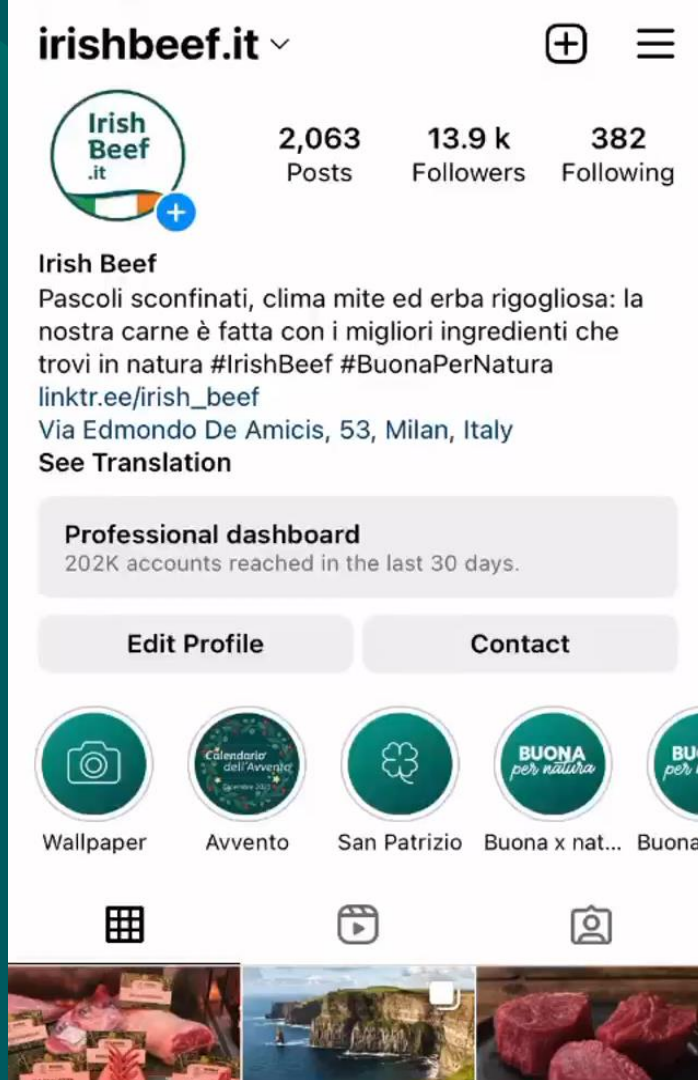

EUROPEAN BEEF & LAMB
Ireland, working with nature

Recruiting new customers

european PORK & POULTRY
Excellence in Quality Assurance & Food Safety



31 events and ongoing digital promotions across five markets

- Seven Trade Shows
- 12 Trade Seminars
- Six Chef Demonstrations
- 45 Trade and Government visit Ireland

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ENJOY IT'S FROM EUROPE







SIRHA LYON

BIOFACH
into organic

TUTTOFOOD
MILANO

anuga

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Converting customers to advocates

Deepening product knowledge & trust



The Grocer

meat management.com









Our Focus

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Go raibh míle maith agaibh.

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