



Introduction to Irish Beef

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Meat & Livestock



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Irish Food Exports underpinned by dairy and beef

	2017	2018	% Change	Volume change
Dairy	4,022,972,689	4,008,478,984	0%	5%
Meat and Livestock	3,950,029,797	3,975,388,461	1%	3%
Beef inc offals	2,495,922,276	2,516,393,896	1%	3%
Pigmeat	711,951,583	666,405,468	-6%	6%
Sheep	273,890,968	315,033,408	15%	-2%
Poultry	292,097,208	316,307,851	8%	0%
Live Animals	176,167,762	161,247,838	-8%	4%
Prepared Food	2,243,193,485	1,878,266,828	-16%	8%
Beverages	1,496,582,807	1,482,343,239	-1%	4%
Seafood	607,603,487	561,928,870	-13%	7%
Horticulture	230,220,983	207,522,863	-10%	-7%
Total	12,550,603,248	12,113,929,244	-4%	2%

* Head

Mission Statement



To drive through consumer insight, and in partnership with industry the commercial success of a world class food, drink and horticulture industry.

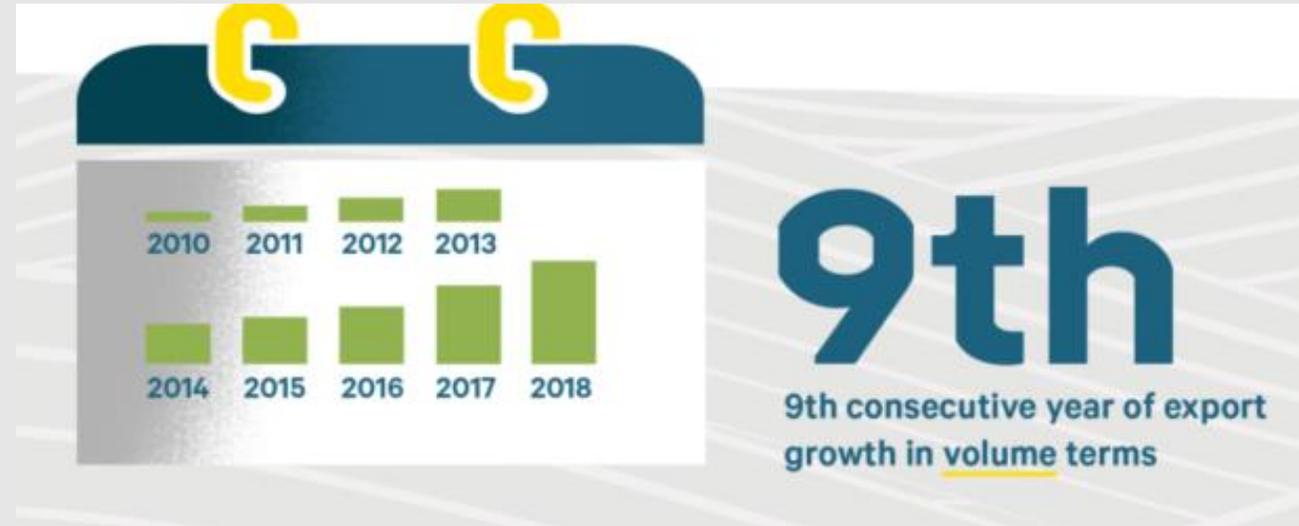
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Bord Bia
Irish Food Board

Bord Bia's Overseas Offices



Irish Food and Drink Exports



Dairy	33%
Meat and Livestock	33%
Prepared Foods	15%
Beverages	12%
Seafood	5%
Horticulture and cereals	2%



Farm Quality & Sustainability Audits



52,000 Beef Farms

90% of Beef Exports, Audited & Carbon Footprinted



18,000 Dairy Farms

95% of Producers Audited & Carbon Footprinted, Aim 100%



Pigmeat, Poultry, Lamb, Eggs, Horticulture

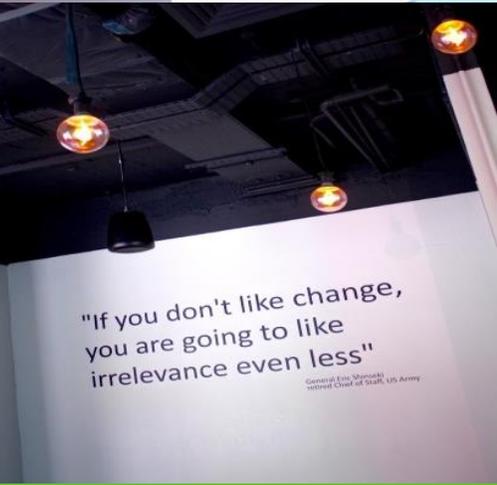
Sustainability measures included

Over 250,000 carbon assessments on farms to date

Origin Green – A Full Supply Chain Programme



Consumer Insight



Growing the success of Irish food & horticulture

Challenges & Opportunities facing the sector

Challenges

- Misleading 'facts'
 - Meat free
 - Environmental challenges
 - Animal Welfare
- AMR
- Profitability levels
- Standing out from the competition

Opportunities

- Grass fed
 - Health
 - Premium
- Responsible production
- Growing import demand in emerging regions



Irish Agriculture

- Mild Temperate Climate
- Average annual rainfall >1000mm
- 4.3 million hectares of farmland
- 80% in grassland
- Beef & Dairy main enterprises
- Average farm size: 32 hectares



Irish Beef Production

- Grass-based beef production
- Grazed / ensiled grass accounts for over 80% of feed consumed (DM).
- Male cattle mainly finished as steers.
- Modern, dynamic processing industry
- 30 Export-Approved Abattoirs, supervised by DAFM
- Slaughter 1.7 – 1.8 million head per year



Ireland's Grass Advantage

Grassland Area	
Ireland	Europe
80%	40%

Production (t DM/Ha)	
Ireland	Europe
15	11

Mild Temperate Climate
Annual rainfall 800 – 1200mm

GULF STREAM

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Irish Cattle Herd (Jan '19)



1.0m. Beef suckler cows



1.45m. Dairy cows

...and the calves from these:



Beef-bred cattle

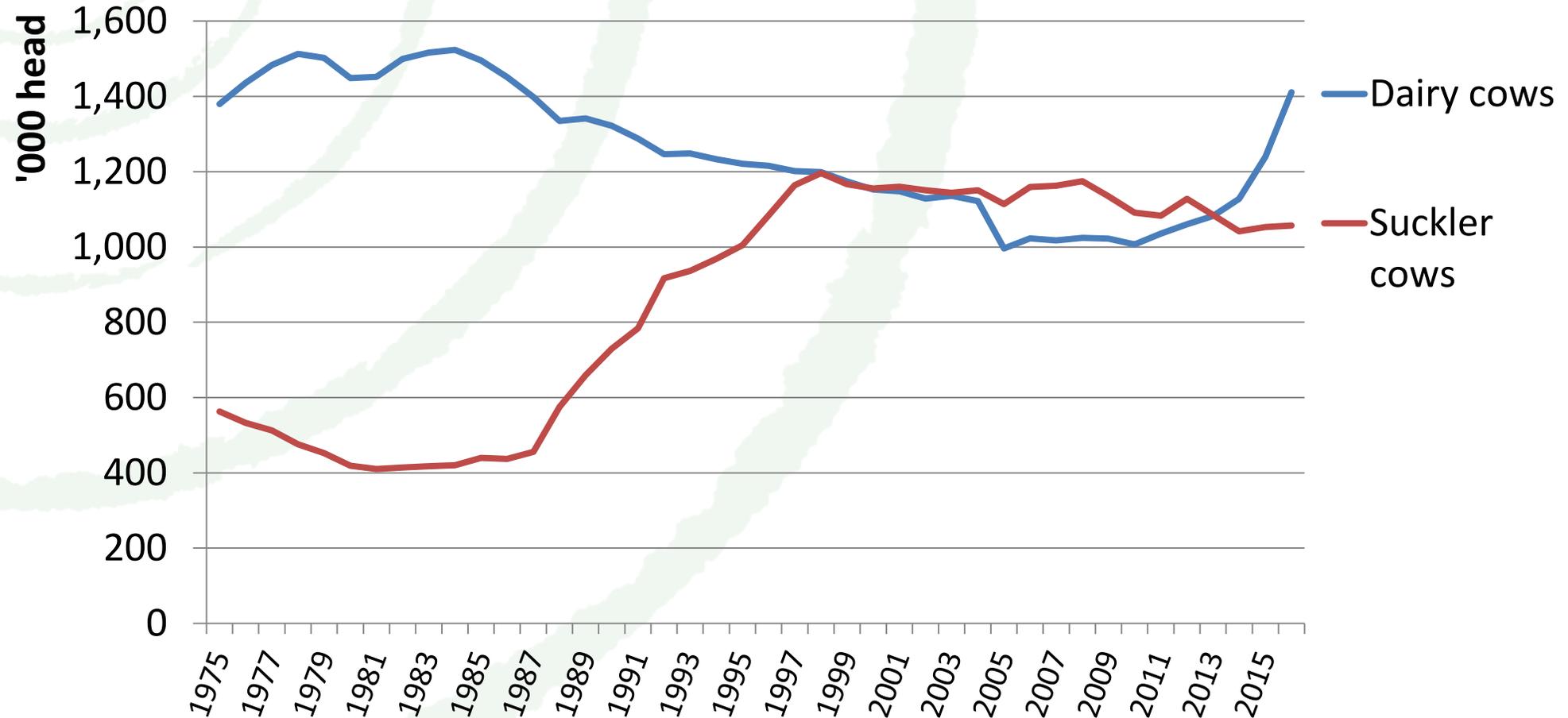


50% Beef Crosses



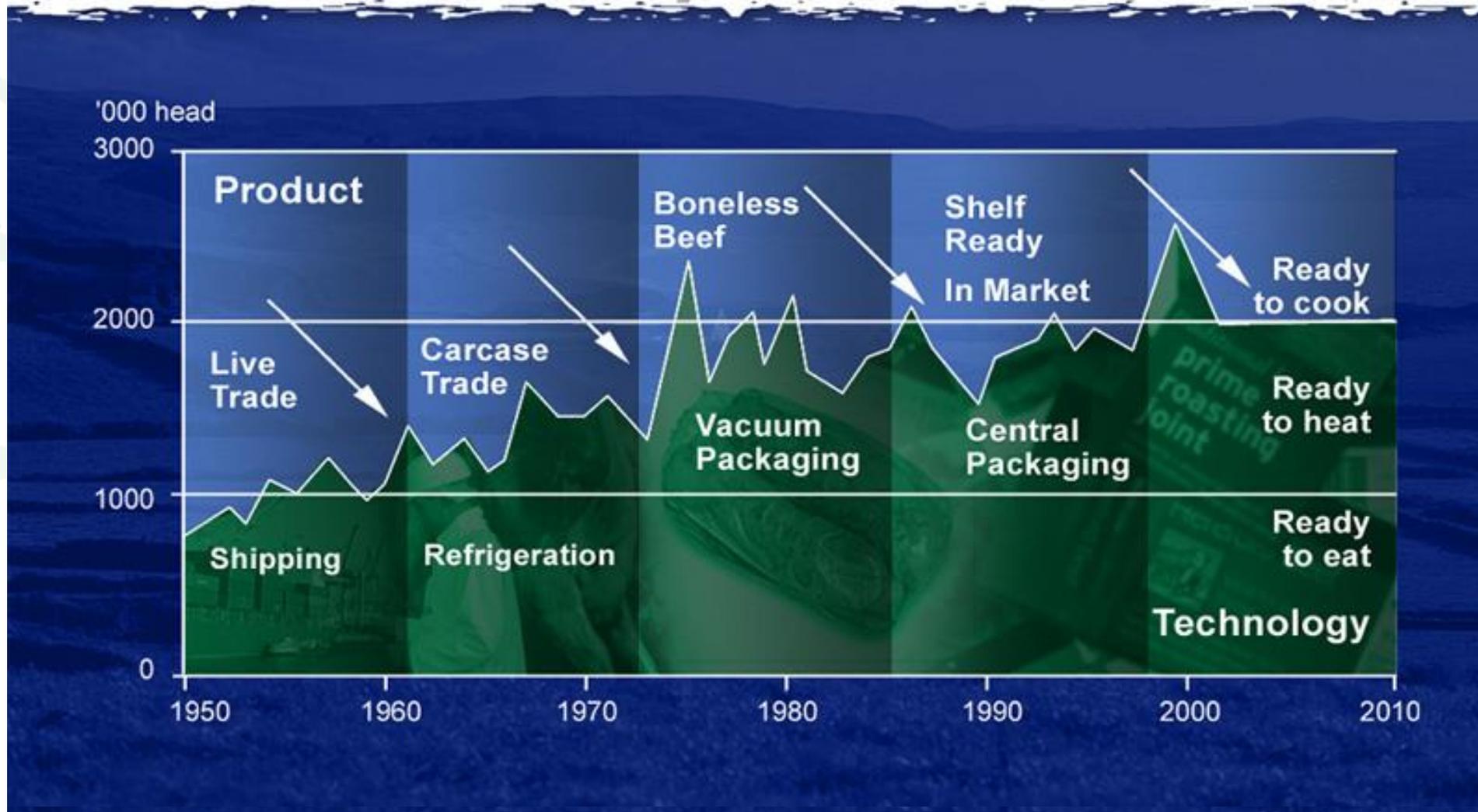
Dairy-bred animals

Ireland - Dairy vs. Beef Cows: 1975 - 2018



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Evolution of Irish Beef Exports





Ireland is over 800% self-sufficient in beef



Largest net exporter in Northern Hemisphere



- Irish beef is exported to more EU retailers
- than that of any other country

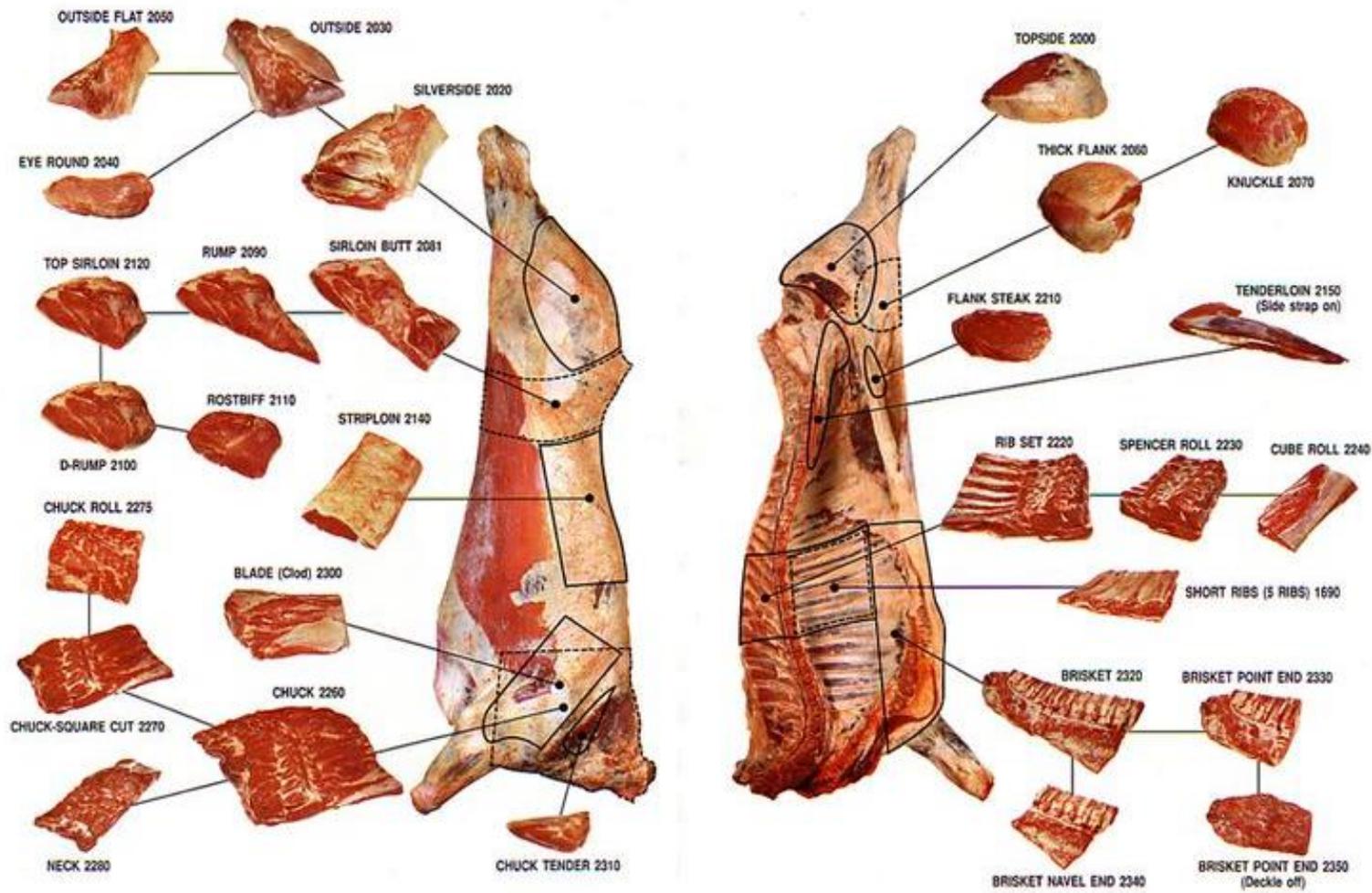


Irish Beef
An expanding
portfolio of high-end
retail and foodservice
businesses

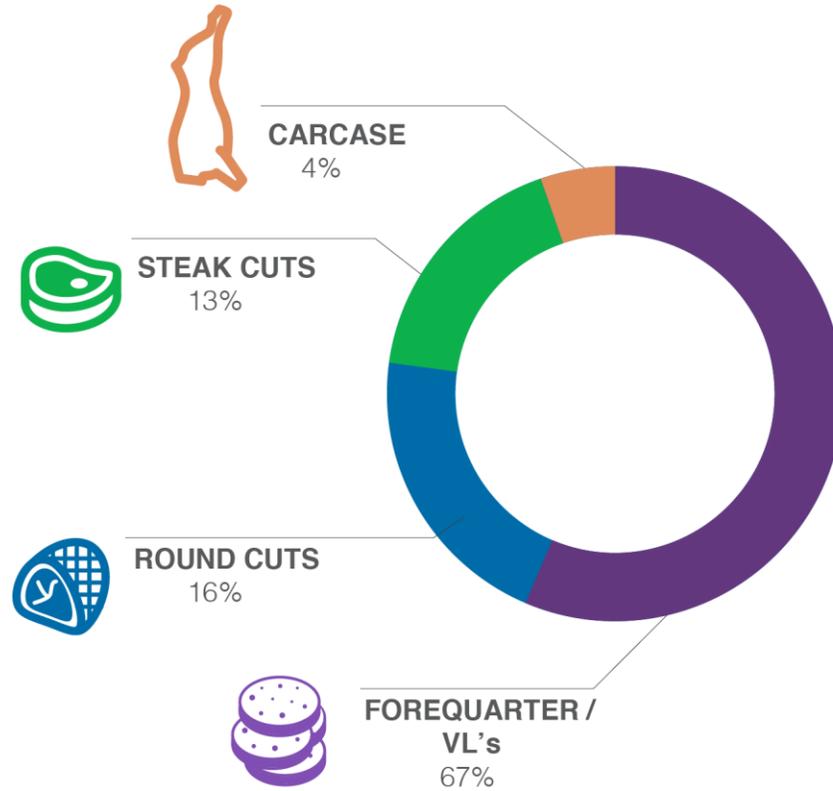
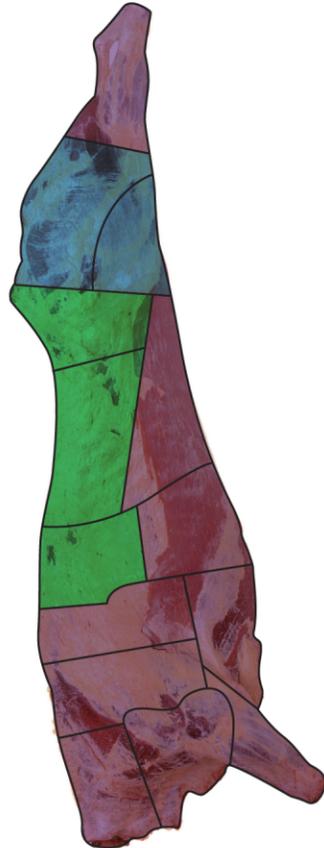


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**PRODUCT TYPE: 20+ PRIMALS MAY BE BROADLY CLASSED AS EITHER:
STEAK CUTS, ROUND CUTS OR FOREQUARTER & VL'S**

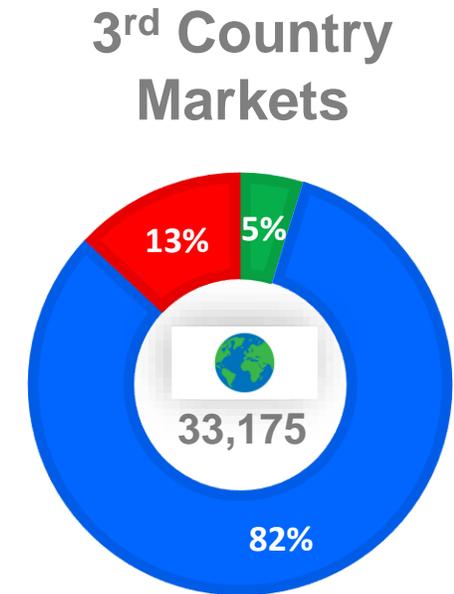
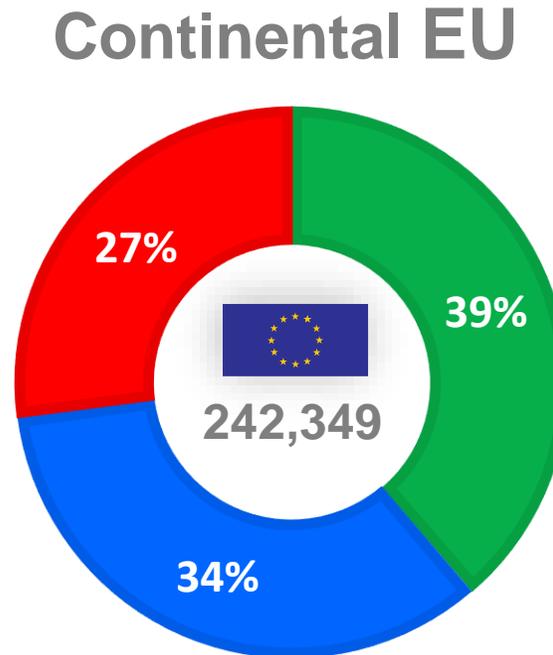
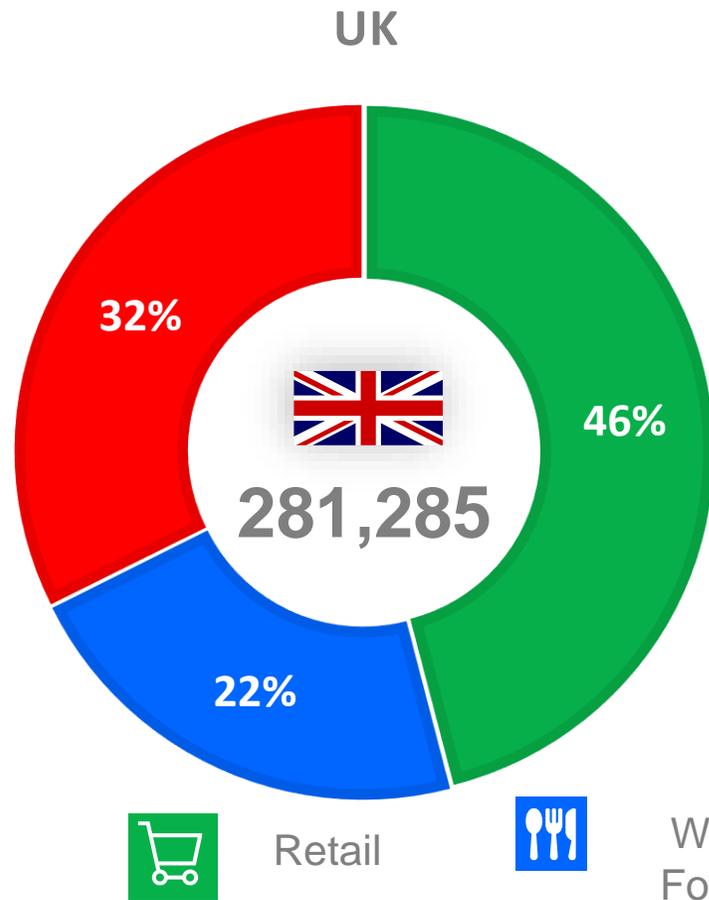


IRISH BEEF - EXPORT VOLUMES BY PRODUCT TYPE - 2017



Market Channels

Irish Beef Exports – Analysis by Market Channel (2017)



Market Channels

Irish Beef Exports (t CWE) by Market Channel (2013 – 2017)

