



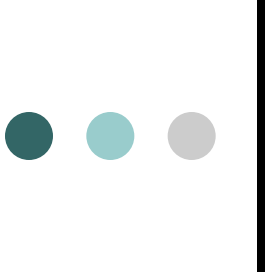
Irish Foodservice Market

*Industry Expert Feedback &
Predictions For 2013*



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JAMES BURKE
& ASSOCIATES



The 2012 Process

- 93 Profile Interviews
- 5 Operator/Distributor Senior Exec Interviews
- 5 Foodservice Producer Interviews
- Trends and Drivers Derived from This Process

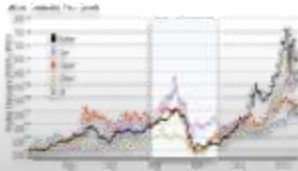


Senior Execs Interviewed

- Grainne Kelliher, ARAMARK Ireland
- Michael Morrissey, Crossgar Foodservice
- Barry Storey, Fitzers Catering
- Joe Redmond, HSE
- Stuart Campbell, La Rousse Foods



Challenges Facing Sector



Commodity Price Increases



Reduced Consumer Spending



Mergers will Continue



Survival

Top Trends Emerging



Value/Quality Proposition



Provenance



Health

How Manufacturers Can Improve



Price has to be a Priority



Focus on New Trends/Products



Deliver Consistent Product & Service Levels

● ● ● | Opportunity Gaps



Health Snacks



Tell the Provenance Story



Explore More Producer Collaborations



Mini Ranges



Does Irish Origin Play a Big Part?

“Green procurement may dominate tenders”

“Five or six years ago sales of Irish products were only circa 20% of turnover, but are now over 50% and growing”

“Producers need to increase the emphasis and profile of the origin of their products through packaging and marketing”

Irish Manufacturers Interviewed

- Robin Simpson, Blenders
- Celine Hayes English, Couverture Desserts
- Ciara McCormack, Donnelly Fruit & Veg
- Clive Gee, G's Gourmet Jams
- Roseann Madden, Milne Foods



Consumer/Industry Trends Effecting Business



Consolidation



Price/Cost



Longer Shelf Life Requirements



Growth in Casual Dining

● ● ● | Advice For Producers For 2013



Understand the Channels



Understand the Customer



Create Promotional Calendars

Foodservice Sector Performance For The Next 12 Months



Price will Dominate



Some Growth May Return



Decide on Cost or Quality Focus
for You

Relationships With Distributors



Educate Your Distribution Team



Harness Promotional Activity

Key Differences Retail vs. Foodservice



Foodservice more demanding



Foodservice often requires more bespoke solutions... Know your customer



Foodservice more competitive but big volume



How Can You Respond?



The Price Approach

- Lean Champion
- Smarter/Cheaper Packaging
- Longer Shelf Life
- World-class Supply Chain
- Increased Automation
- Efficient Procurement

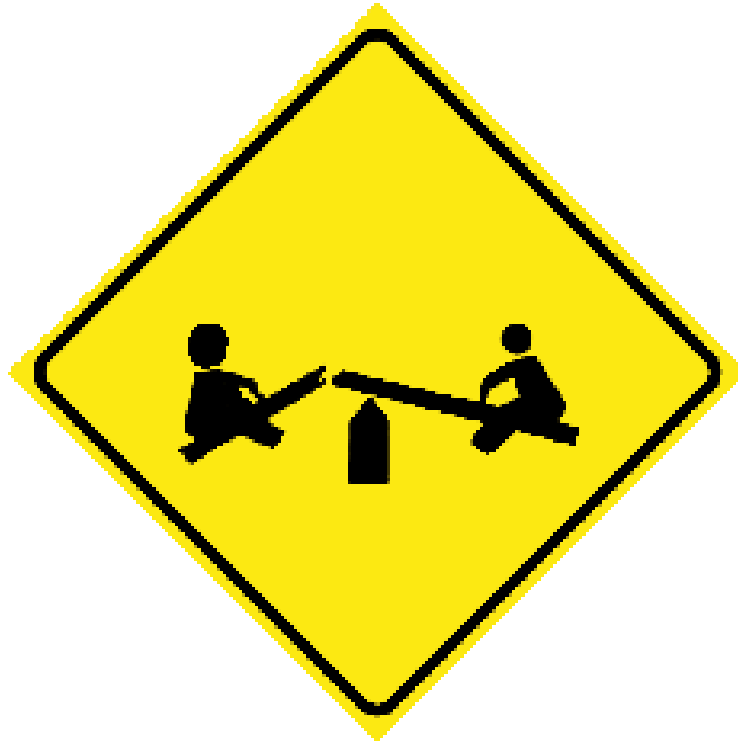


The Non Price Approach

- More Structured Innovation
- Improved Account Management
- Improved Customer/Consumer Knowledge
- Solution Based Approach
- Global Foodservice Expertise
- Taste/Quality/Provenance/Communication



● ● ● | You Can Not Be Both





What Can You Do?

- 
- Study the 2012 Bord Bia Irish Foodservice Market Directory
 - Consider 2013 Foodservice Supplier Development Programmes
 - Become Strategic About Foodservice



Thank You!