

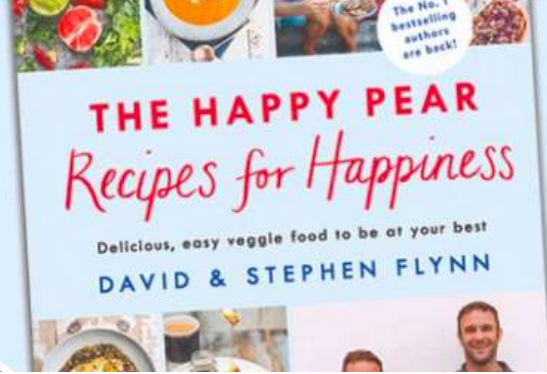


# NEWS

The new  
immersive  
Topshop  
virtual reality  
campaign

May 2017





OUR NEW BOOK  
**RECIPES FOR HAPPINESS**  
IS OUT! ORDER NOW!

ROSANNA DAVISON

Eat Yourself Fit

MAKE YOUR WORKOUT WORK HARDER



*Lovin Dublin*

Tweets  
**52.6K**

Following  
7,146

Followers  
205K

Likes  
9,542

Follow

Lovin Dublin







# Irish Foodservice **Market Insights**

NOVEMBER 2018



Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board

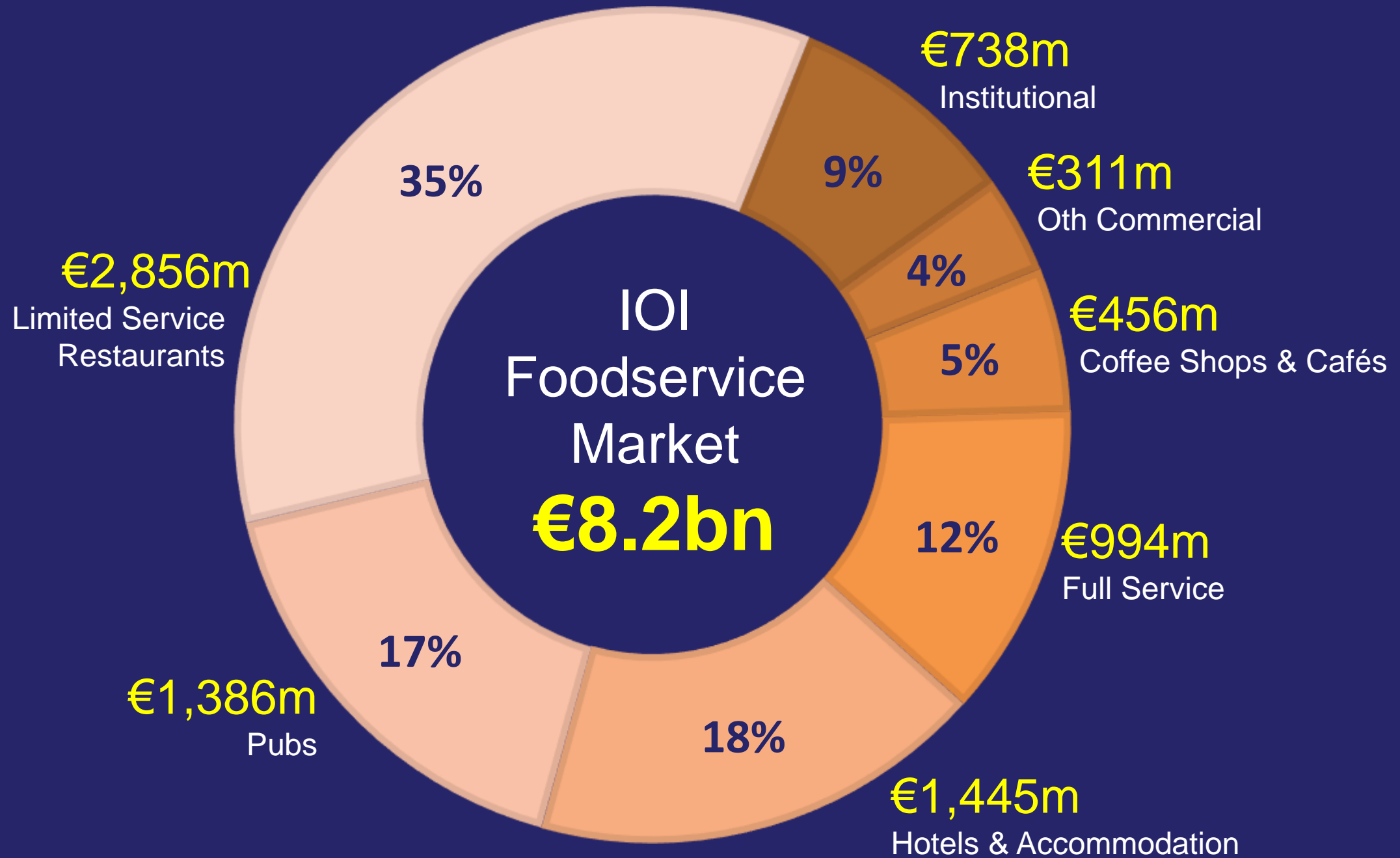
[www.bordbia.ie](http://www.bordbia.ie)

Critical Strategic Issue

#1

**Boom times drive growth,  
but create major challenges**

# Irish Foodservice Market Snapshot







< September



27 Sep 2018



6

**Tourism Ire**  
**of +7.8% in**  
**January-Au**

We are determined to ensure that tourism growth continues. Our aim is to grow overseas tourism revenue in 2018 to €6bn, for the island of Ireland.

Niall Gibbons, CEO Tourism Ireland



**Ireland's healthy tourism has  
been a boon to Economic Growth**

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CULTURE

MORE

[The Economy](#) > [Budget 2019](#) | [Small Business](#)

All Business ▼

## Donohoe confirms 'disastrous' VAT rise to 13.5% for tourism

Budget 2019: Minister says measure will raise €466m for spending and is 'responsible'

🕒 Tue, Oct 9, 2018, 14:11

Updated: Tue, Oct 9, 2018, 14:12

[Mark Paul](#), [Fiach Kelly](#)





jobs find

Technology Careers

Technology Careers

Technology Careers

505

Ed

careers

# THE WAR FOR TALENT

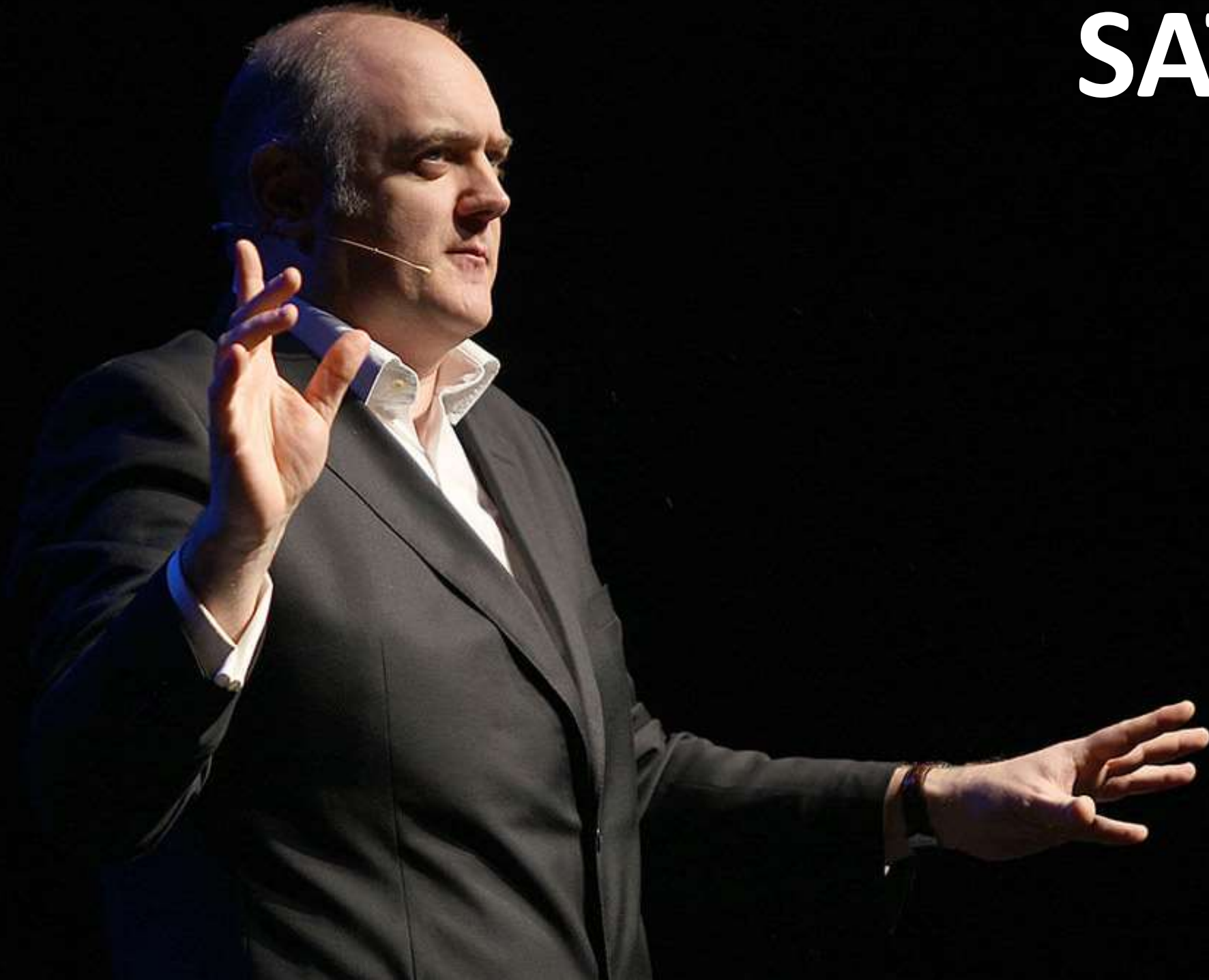


Ed Michaels • Helen Handfield-Jones • Beth Axelrod

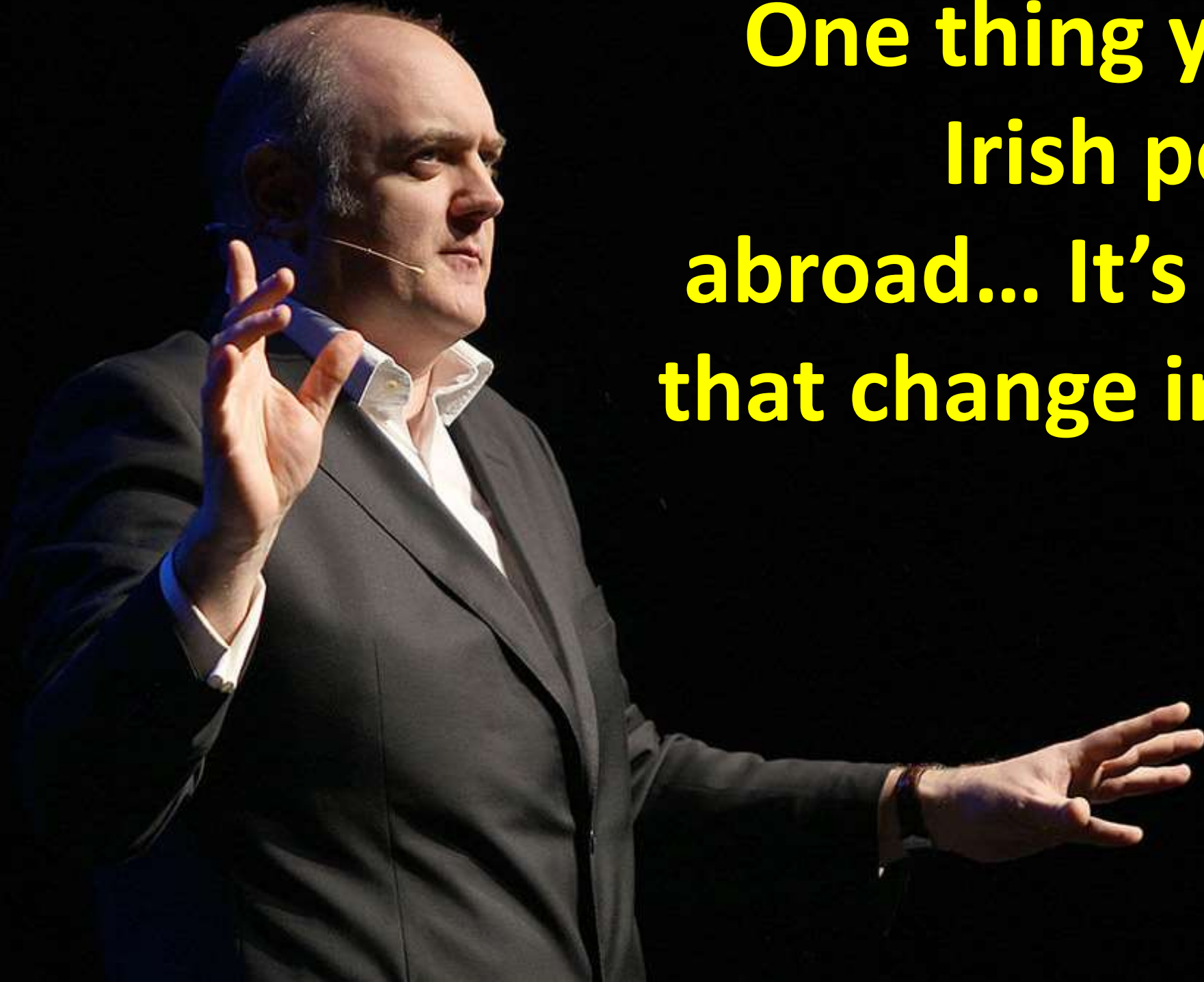
HARVARD BUSINESS SCHOOL PRESS

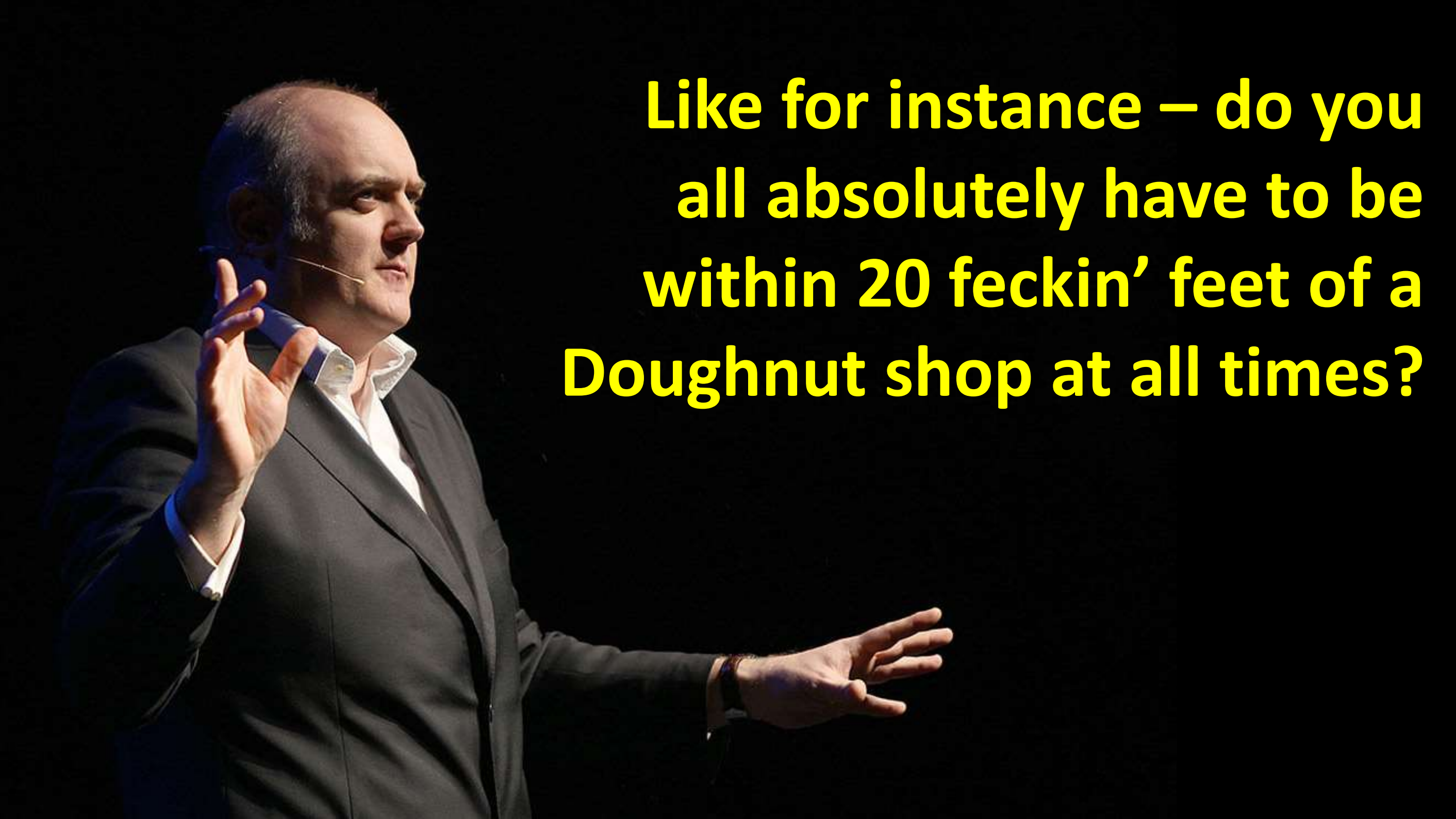


# SATURATION?



**One thing you notice as an  
Irish person who lives  
abroad... It's the little things  
that change in between your  
visits home.**

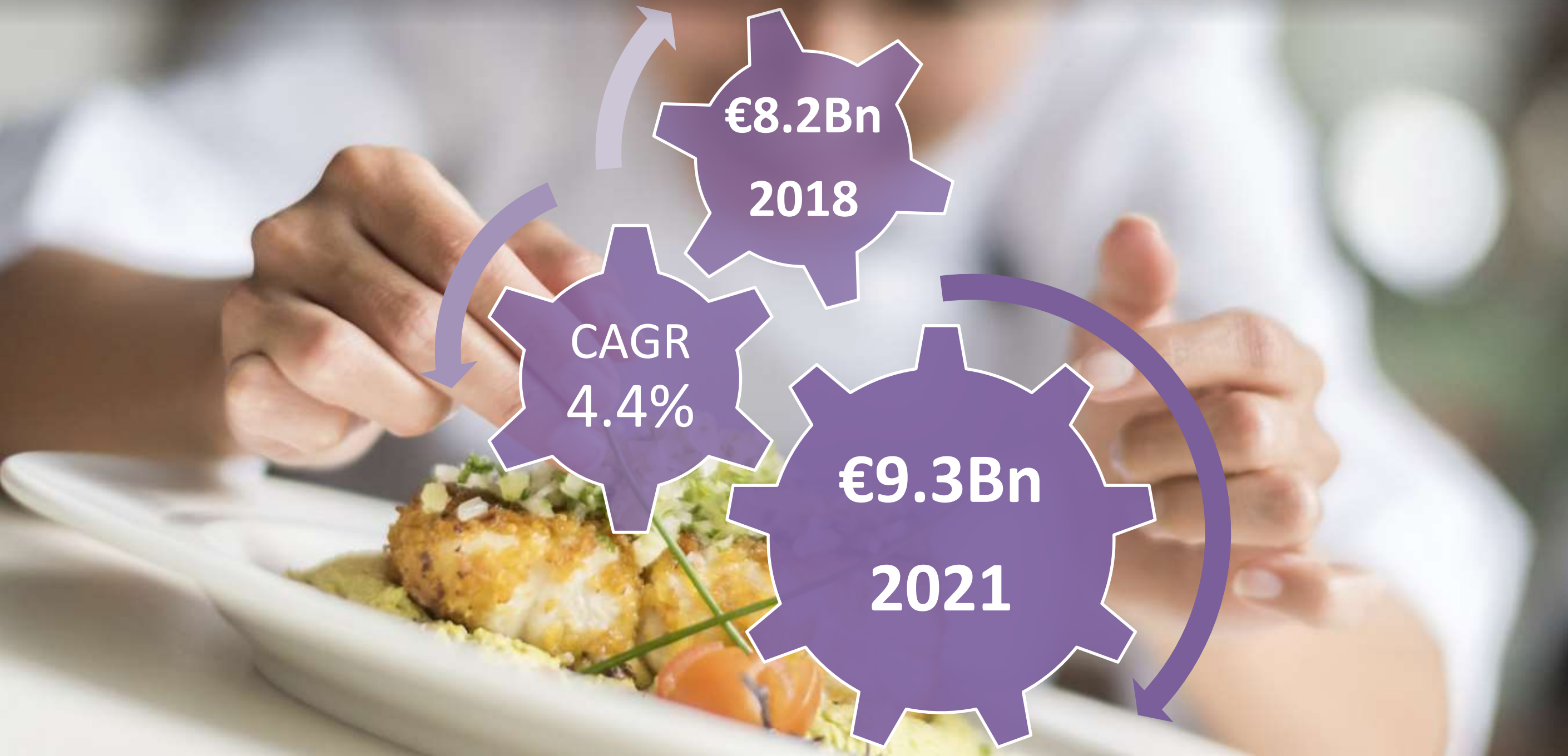


A man with a receding hairline, wearing a dark suit jacket over a light-colored shirt, is shown from the waist up. He is gesturing with his right hand raised and fingers spread, and his left hand is also extended outwards. He appears to be speaking into a small microphone clipped to his shirt. The background is dark, and the lighting is focused on him.

**Like for instance – do you  
all absolutely have to be  
within 20 feckin’ feet of a  
Doughnut shop at all times?**



# 3 Year Growth Outlook 2019-2021



Critical Strategic Issue

#2

**Foreign investment is changing the nature  
of competition in Irish Foodservice**

[illegible]



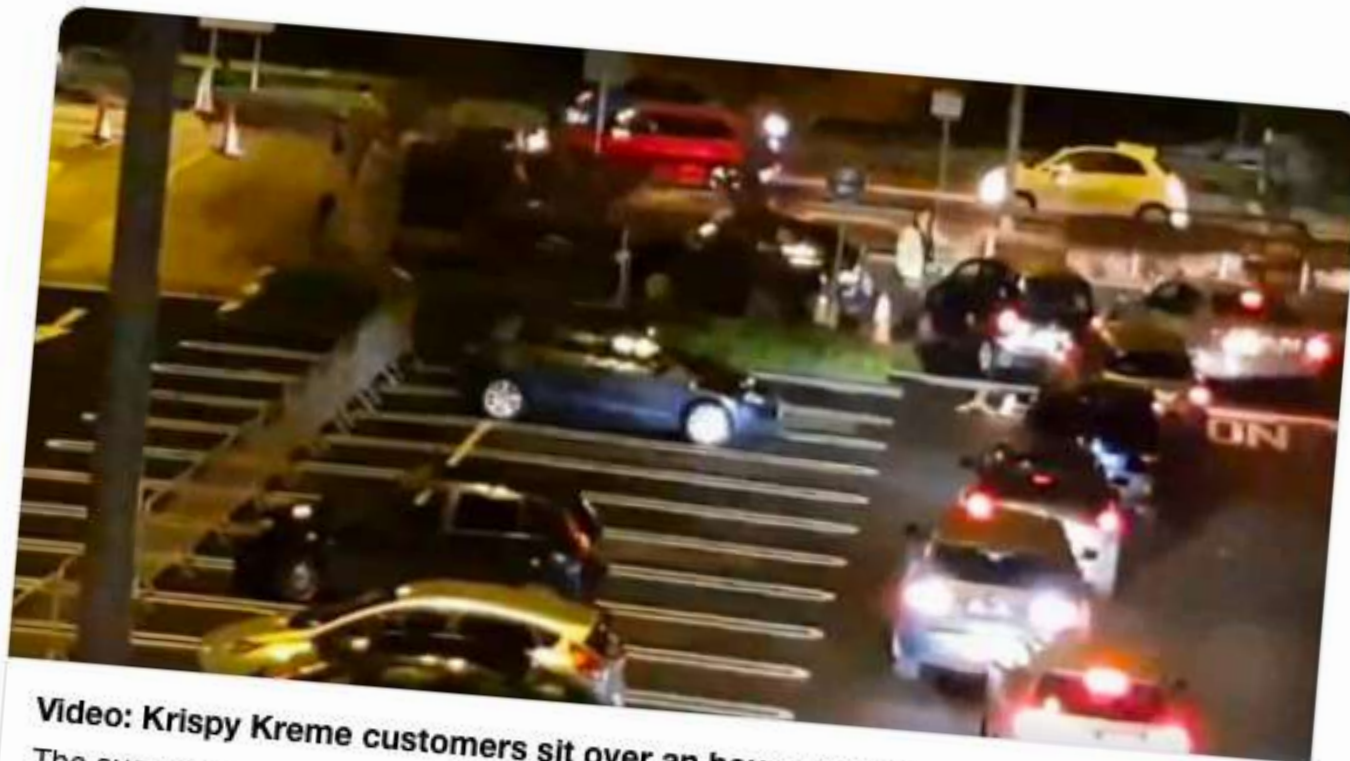


DublinLive

@DublinLive

Follow

Hilarious video shows Krispy Kreme customers sitting in their cars for over an hour without realising they're not in the queue



**Video: Krispy Kreme customers sit over an hour unaware they're not in the line**

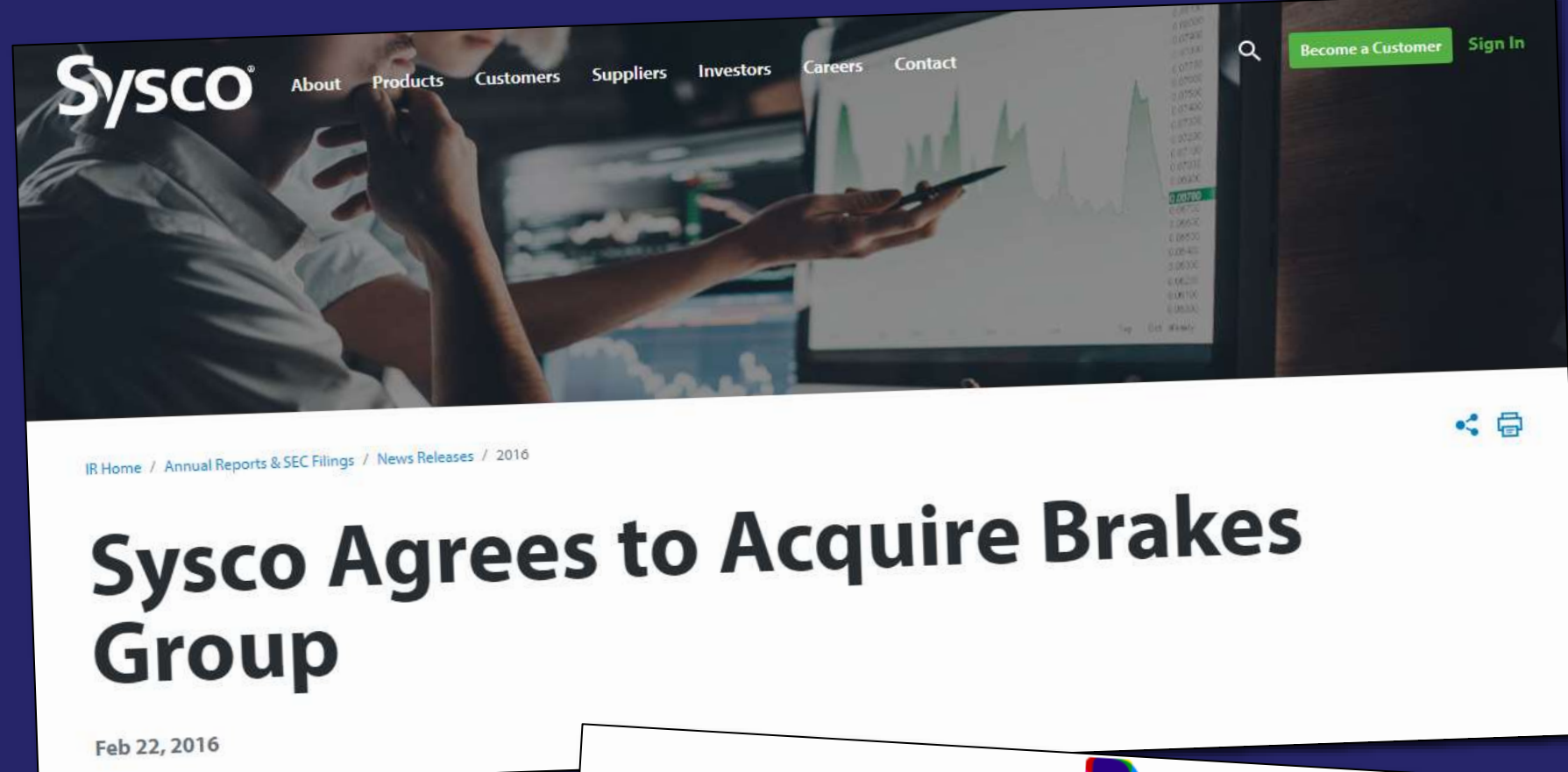
The sugary treats being sold at the Blanchardstown Centre has brought on a new level of traffic chaos, and some noisy honk-happy customers have been causing...

[dublinlive.ie](https://dublinlive.ie)

7:07 AM - 3 Oct 2018



# Distributor Consolidation



Critical Strategic Issue

#3

**Channels blur as food becomes  
point of differentiation**



# Non-traditional segments increasingly use food to compete





**Non-traditional segments increasingly  
use food to compete**



# New Channels Emerge

## BWG plans €25m Spar expansion and pivot towards digital

Retailing group to open 45 new stores and will go deeper into the restaurant market with in-store dining

🕒 Tue, Oct 9, 2018, 05:44

Mark Paul



Leo Crawford, group chief executive of BWG Group, outside the relaunched SPAR Millennium Walkway store in Dublin city centre.



Critical Strategic Issue

#4

**Today's Irish consumer has new demands**

# Convenience is the key Driver







**Dayparts blur and traditional ways of dining are disappearing**





**Consumers are looking for more  
experience when eating out**





Critical Strategic Issue

**#5**

**The pros and woes of Ireland's growing  
on-demand Foodservice culture**



# Your favourite restaurants, delivered fast to your door.

Enter your postcode

e.g. EC4R 3TE





# Delivery is a global disruptive trend



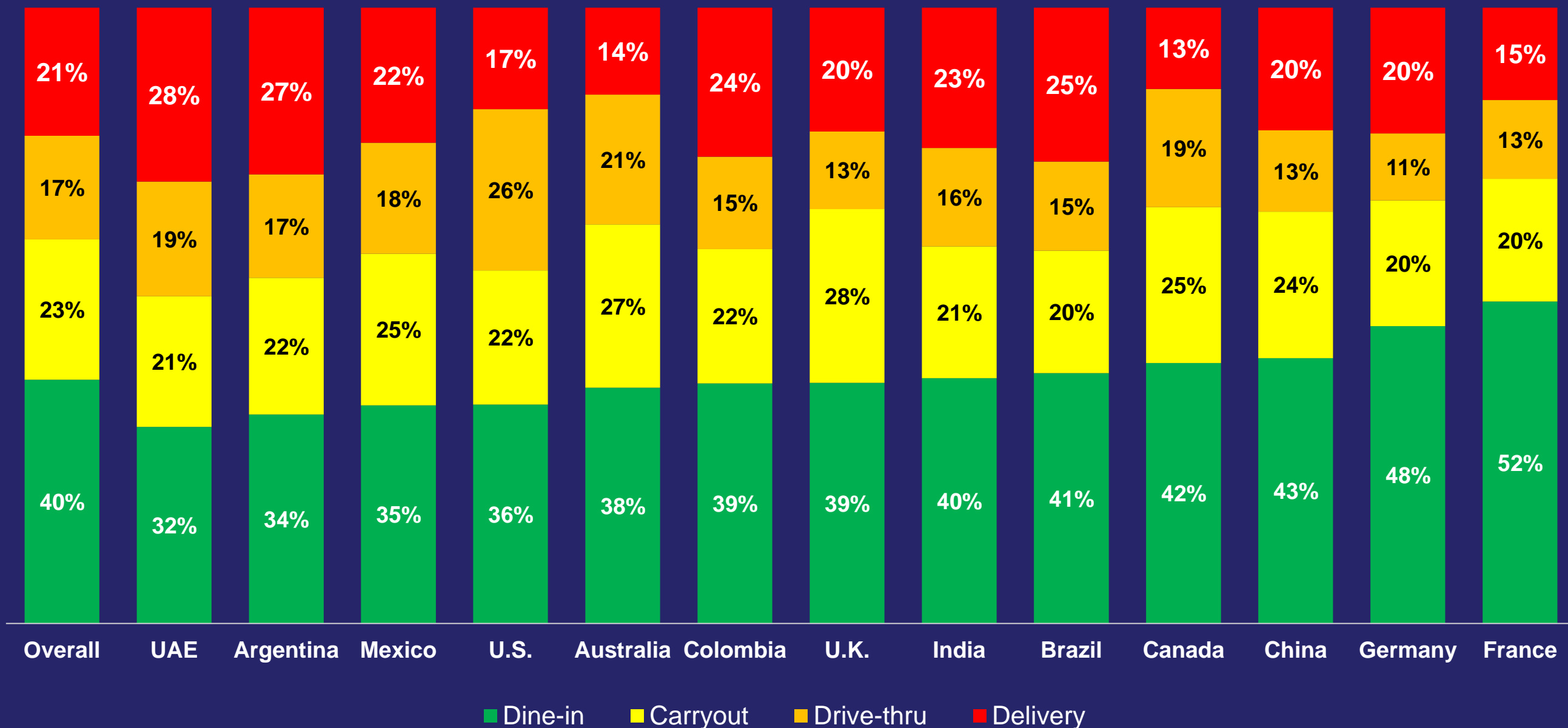






# Order Format

## (% of Orders For...)



Source: Technomic, Coca-Cola State of the Global Restaurant Industry

Critical Strategic Issue

#6

**Adopting the Millennial stat of mind:  
tech forward, automated**



# Globally, tech trends dominate

## ONLINE ORDERING

42% say it adds value to their restaurant experience, up by 5% since 2017

## ORDER/PAY VIA APP

39% say it adds value to their restaurant experience, up by 3% since 2017

## ONLINE PAYMENT

39% say it adds value to their restaurant experience, up by 4% since 2017



# Tech has broad implications for operational optimisation





**Tech has broad implications for  
operational optimisation**



— THE IMPORTANCE OF —  
**Blockchain** in  
Food Traceability



# Tech has broad implications for operational optimisation

## HOS & DVIR Compliance

The existing GPS Tracking and Ignition sensor can help derive HOS and keep it to mandated limit. The similar system can be used to file and generate DVIR.

## GPS Tracking & Routing

GPS tracking makes the driver execute the exact route, geo-fence truck with expensive shipment and avoid entering inter-city roads as shortcuts.

## Self-Vehicle Diagnostics

The ECM system provides ample operational data that can be converted into actionable items like self servicing module or real-time failure rectifications.

## Driver Management

Monitor the driving behavior of your drivers for harsh braking, rash driving, idle times and fuel consumption patterns that helps system to create driver profiles

## Environment & Theft control

The reed control sensor and temperature/humidity sensors can be programmed to maintain a specific environment while shipping sensitive cargos

Fleet management using  
Internet of Things (IOT)



# Technology enables regulatory compliance



WELCOME TO NUTRITICS v4.0



# Wide-ranging longer term implications as technology evolves





Critical Strategic Issue

#7

**Diets re-defined: the changing  
palate of the Irish consumer**

# Health-oriented concepts showcase changing consumer demands





# Health-oriented concepts showcase changing consumer demands



Rowan

Home

Create



Notifications



Stacks Healthy Kitchen

@stackshealthykitchen

Home

Reviews

Photos

Videos

Posts



Like



Follow



Share



...



Send Message



Create post



Write a post...

4.8

4.8 out of 5 · Based on the opinion of 16 people

# Health Diversifies



- Classics go plant-based
- Functional callouts
- Significant focus on sustainability





Critical Strategic Issue

#8

**Conscious operating practices the new standard**



# Packaging sustainability has become a major issue





# Dunkin' Donuts built a tiny, sustainable home that's powered only by recycled coffee grounds



**Eben Diskin, Matador Network**

Oct. 16, 2018, 10:02 PM  32



FACEBOOK



LINKEDIN



TWITTER



- Dunkin' Donuts collaborated with New Frontier Tiny Home to build a 275-square-foot house powered by excess oils from recycled coffee grounds.
- Actress Olivia Wilde decorated the interior with black-stained, coffee-hued wood as well as pink and orange details inspired by Dunkin' Donuts' brand colours.
- The house is intended to demonstrate the efficiency of clean, sustainable energy.





Critical Strategic Issue

#9

**Approaching Brexit, uncertainty  
is the only constant**



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## Impact of Brexit on Ireland to be ‘negative and significant’

Significant resources must be set aside in readiness for impending risks, warns IMF

🕒 Sat, May 13, 2017, 01:00

**Cliff Taylor, Charlie Taylor**





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## No-deal Brexit could cost Ireland more than 50,000 jobs, IMF warns

Washington-based fund study finds hard Brexit would hit State severely

🕒 Thu, Jul 19, 2018, 18:24

Updated: Thu, Jul 19, 2018, 21:20

**Eoin Burke-Kennedy**





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## IRELAND

# Brexit could ruin Ireland's food industry, Bruton and Ahern tell Lords

Former prime ministers John Bruton and Bertie Ahern issue warning about possible common external tariffs between Ireland and the UK

**Patrick Wintour** *Diplomatic editor*

Tue 25 Oct 2016 19.25 BST



117



# Ireland and Brexit - preparing for the worst

John Spain @IrishCentral | Jul 18, 2018

10  
SHARES



**“If a last minute deal can be reached that will mean a hard border in Ireland as an unintended consequence, one wonders whether the rest of the EU would stick with the backstop.”**



Last week, two years after the British referendum vote to leave the EU, we got the first detailed statement on what the British government wants to achieve with Brexit.



# Foodservice industry primarily concerned with...



SUPPLY CHAIN/  
LOGISTICS



SOURCING



HIGHER  
PRICES



## Business



FOLLOW



CONTACT

# Why a Brexit might be good for Ireland

Peter Casey

July 13 2014 2:30 AM





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## Barclays seeking to move €250bn business to Republic ahead of Brexit

Bank to ask court to allow it to transfer its non-UK European business to Dublin office

🕒 Wed, Oct 31, 2018, 05:53

Barry O'Halloran



so  
what?



1

**Continue  
to monitor  
and plan  
for Brexit**

2

**Invest in  
socially  
responsible  
practices**





3

**Have a  
strong  
focus on  
cost control**

4

**At the same  
time, invest in  
differentiation  
in all aspects of  
the business**



5

**Incorporate  
critical strategic  
issues into long-  
term planning  
processes**

# 9 Critical Strategic Issues



Boom times drive growth,  
but create major challenges

Channels blur as food becomes  
point of differentiation



Today's Irish consumer  
has new demands

The Pro's and Woes of Ireland's  
Growing On Demand Foodservice Culture



Adopting the Millennial State  
of Mind: Tech Forward, Automated

Diets re-defined, the changing  
palate of the Irish consumer



Operating with a conscience is  
the expectation, not the exception

Approaching Brexit,  
uncertainty is the only constant



Foreign investment changing the nature  
of competition in Irish foodservice



