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MIDLAND REGIONAL FOOD AND DRINK STRATEGY

2021-2024

An ambitious strategy to harness the potential
of the midland food and drink economy

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MIDLAND REGIONAL
FOOD AND DRINK STRATEGY

2021-2024



"THE BIG THEMES AND
INDIVIDUAL IDEAS
THAT BECOME THE
FOUNDATIONS OF THE
BUSINESS STRATEGY."

FOREWORD

It gives us great pleasure to present the [MidlandsIreland.ie](https://www.midlandsireland.ie) Regional Food and Drink Strategy 2021-2024. This Strategy was included as an action in the MREP to 2020 and it clearly sets out the ambition for the region to 2030.

This document represents an industry-led, ambitious strategy and will depend upon the collaboration and commitment of all stakeholders and the regional producers to succeed. Collectively we are making a commitment to work together to grow the value and reputation of the Midlands food and drink both Nationally and Internationally.

This Strategy seeks to support and develop food and drink producers of all scales across the Midland counties of Laois, Longford, Offaly and Westmeath, with the sustainability agenda at its very core, whilst seeking to overcome the many challenges faced by the sector from Brexit and Covid-19.

We, as Co-Chairs of the Midlands Food and Drink Working Group extend our appreciation to our members for sharing their informed insights during the development of this Strategy, and we look forward to building on this work with the implementation of the actions identified.

On behalf of the working group, we extend our thanks to Food First Consulting who were appointed to facilitate the development of this Strategy and acknowledge the invaluable contributions which the various industry stakeholders made throughout the process. We also extend our gratitude to Ms Joanne Murphy, photographer, for capturing the stunning images of Midlands Regional food and drink.

Finally, we would like to acknowledge the support of the Local Enterprise Offices in Laois, Longford, Offaly and Westmeath and the Local Authorities of Laois, Longford, Offaly and Westmeath, in developing this Strategy.

Vincent Cleary

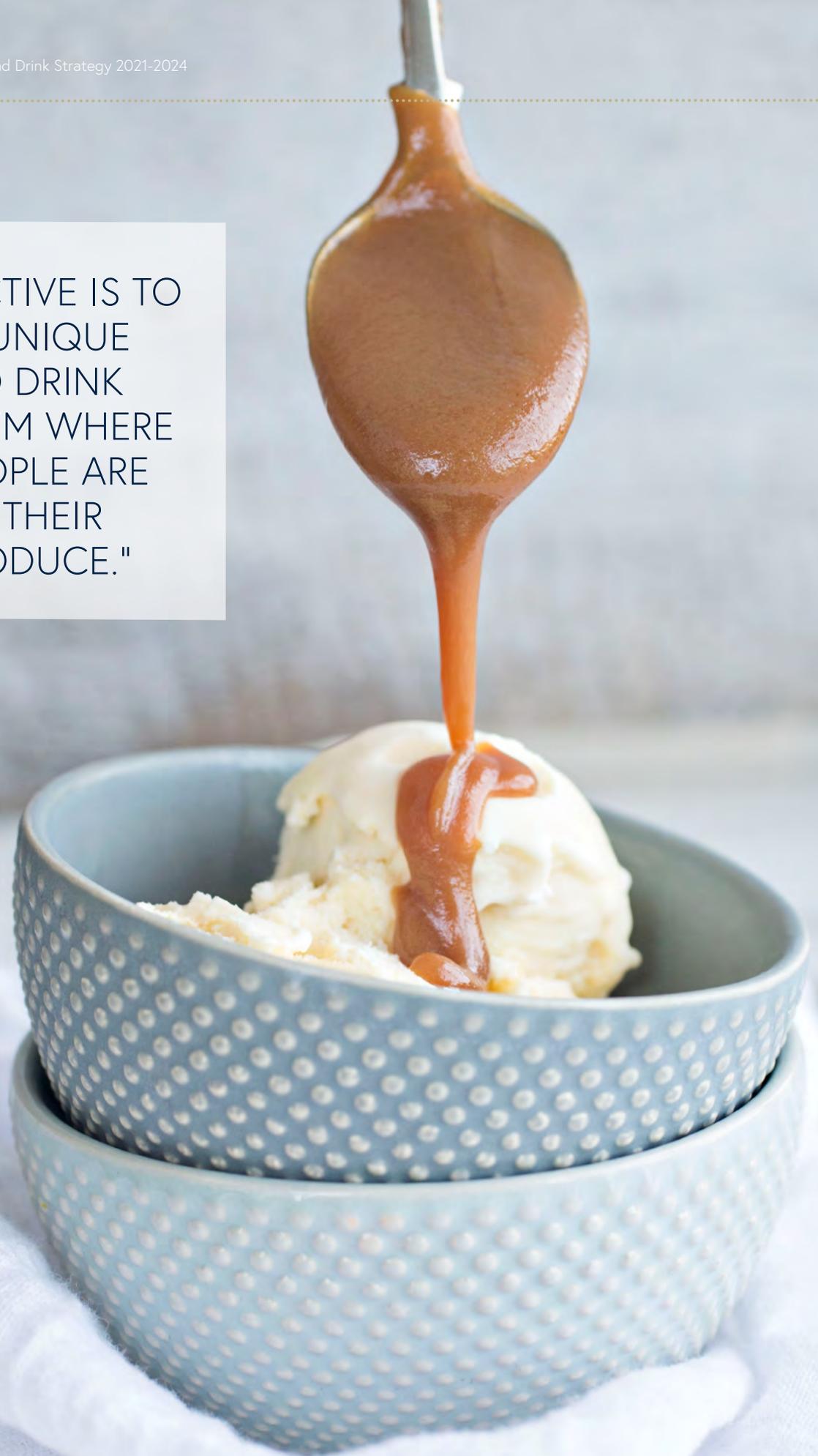
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Glenisk*

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"THE OBJECTIVE IS TO
CREATE A UNIQUE
FOOD AND DRINK
ECO-SYSTEM WHERE
LOCAL PEOPLE ARE
PROUD OF THEIR
LOCAL PRODUCE."



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EXECUTIVE SUMMARY

This Strategy has been developed in response to an identified need for a collaborative, cross-sector approach to deliver a sustainable and resilient food and drink eco-system in the Midland Region, comprising Laois, Longford, Offaly and Westmeath. The objective is to create a unique food and drink eco-system where local people are proud of their local produce, where companies have the capabilities and supports to create world-class hospitality and product experiences, where scaling and exporting is enabled, whilst respecting nature and our environment.

With these objectives, a suite of unique actions have been identified. These actions align with four pillars of activity and are in turn supported by enabling actions that are common to all pillars.

Strategic Pillars

- Sustainability
- Awareness
- Export Capability
- Food Tourism

Enabling Actions

- Allocating Resources
- Creating a Midland Food and Drink Cluster
- Fostering Innovation and Nurturing Capability

Whilst the Strategy has been created to 2024, it is recognised that the appointed Midlands Food and Drink Programme Manager will define the exact chronology of activities, project leads and funding sources. A mid-term review will also be required to assess progress and amend as necessary. The timescales also recognise that the project management resource must aspire to a self-funded model by year 4, to provide continuity.

Close collaboration and deep resilience will be crucial for the Midlands to implement this plan and to navigate the challenges posed by the Covid-19 pandemic and Brexit. To nurture this sense of unity, the Strategy is based on a strong foundational vision, mission and purpose.

The development of this Strategy was informed and guided by the relevant EU, national regional and local policies. The Midland Food and Drink Strategy will translate these policies for delivery through its core pillars and enabling actions.

Our Sustainability and Export Readiness pillars are closely aligned to the core elements of the **'Foodwise 2025'** Strategy. The Awareness and Tourism pillars are also closely aligned to the national policy of **'People, Policy and Place: Growing Tourism to 2025'**. At an EU level, our key pillar of Sustainability is aligned to the **'European Green Deal'** and seeks to set ambitious targets for the Midlands to become a leader in this area. Finally, the Midland Food and Drink Strategy will support the **Our Rural Future - Rural Development Policy 2021-2025**, by harnessing the strength of the food and drink sector, supporting indigenous businesses to create jobs and unlock the potential of the Midlands.



OUR VISION IS THAT...

THE MIDLANDS WILL BE THE MOST **SUSTAINABLE REGIONAL FOOD AND DRINK ECOSYSTEM**

ON THE ISLAND
meeting 2050 environment
neutral targets by 2030.



OUR MISSION IS TO..

CREATE **A UNIFIED MOVEMENT** TO
STEP-CHANGE THE **SUSTAINABILITY,**
EXCELLENCE, VISIBILITY, PRIDE
AND **ECONOMIC**
IMPACT OF OUR UNIQUE
MIDLANDS FOOD AND DRINK
PROPOSITION.



OUR PURPOSE IS TO...

PROMOTE **INDIGENOUS CONSUMPTION, EXPORTS**
AND **VISITOR ENGAGEMENT** THROUGH **EDUCATION,**
MARKETING, BUSINESS **SUPPORTS** AND CONTINUOUS
IMPROVEMENT, FOCUSING ON OUR **SUSTAINABILITY** CREDENTIALS.



INTRODUCTION

The Midland Region, consisting of Laois, Offaly, Westmeath and Longford had established a strong trajectory of growing employment pre Covid-19 with 26,100 more people in employment (Q1 2015 to Q3 2020). As of Q4 2020, employment had grown by 24.1% since 2015. Placed strategically in the centre of the country, the region is serviced by a vibrant third level sector with Technological University of the Shannon – Midlands Midwest and IT Carlow.

The accumulated effect of the Regional Action Plan for Jobs, the Midlands Regional Enterprise Plan, Enterprise Ireland, IDA Ireland, Local Enterprise Offices (LEOs) and other supports has borne fruits in our region and it is important to highlight that supports are dynamic and responsive to stakeholder priorities and needs. This is demonstrated through Bord Bia, Enterprise Ireland and the LEOs supporting the immediate needs of food and drink business through the 'Post-Covid-19 Vision' training and mentoring and the various supports for the Brexit challenge. Looking further ahead, the LEOs are rolling out the 'Going Green' pilot initiative.

The Midland Regional Enterprise Plan (MREP) has ambitions of driving employment growth, building economic resilience and reducing the regional unemployment rate and increasing labour force participation. The MREP is built around strategic objectives, one of which is to harness the potential of the food and drink industry through the development and implementation of a Regional Food and Drink Strategy. For the wider food and drink sector to play its part, this Strategy must be highly ambitious and fully integrated with the remaining strategic objectives.

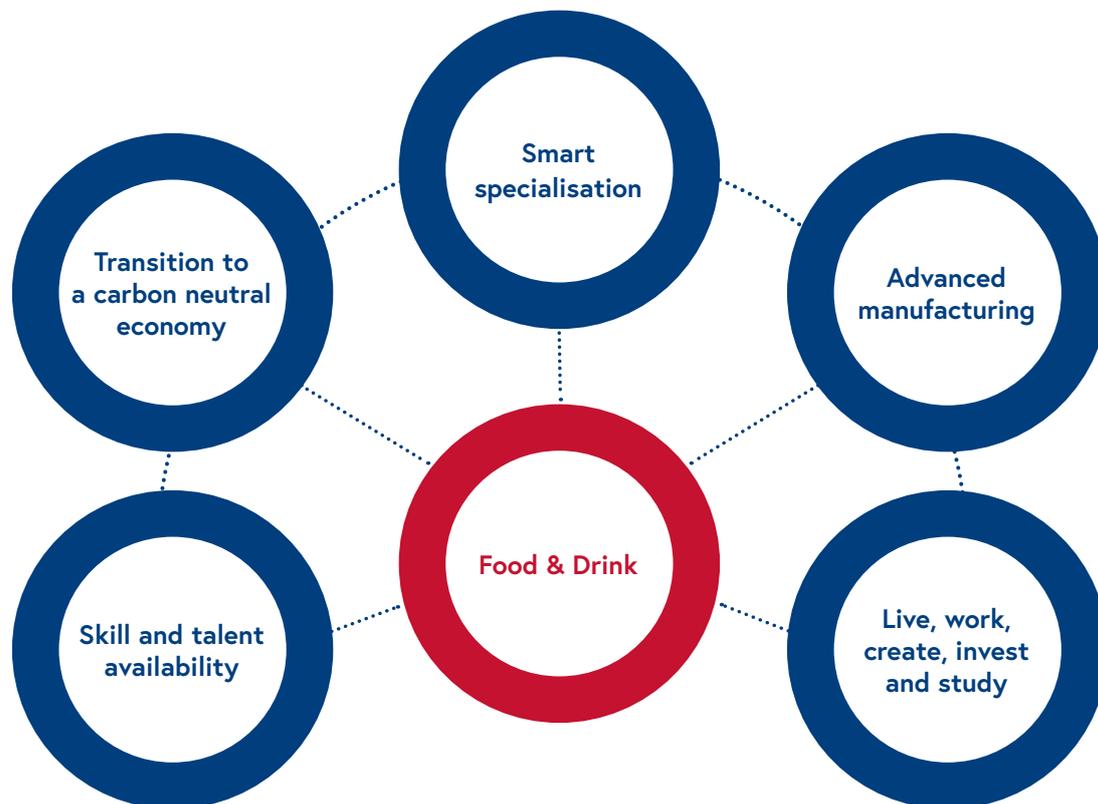
The brief was to develop a Regional Food and Drink Strategy incorporating the views of food producers, the hospitality industry, tourism industry, food retail and other relevant local and national stakeholders. This Strategy showcases key strengths and areas of development potential within the food sector, providing a vision for the region in the medium to long term, drawing on national and international best practice.





"BY HARNESSING THE
POTENTIAL OF THE
ENTIRE FOOD AND DRINK
INDUSTRY, ONE CAN
STRENGTHEN THE FOOD
AND DRINK ECOSYSTEM"

In terms of economic impact, the food and drink industry can make an enhanced contribution to the ambitions of the Regional Enterprise Plan. By harnessing the potential of the entire food and drink industry, one can strengthen the food and drink eco-system where stakeholders interact and accelerate development. The Strategy development process has endeavoured to identify opportunities for connections between all MREP objectives, with food and drink at its core.



The food and drink sector is central to the overall MREP. Keeping in mind an ethos of collaborative mindsets, complementary initiatives and value-adds, we have created a Midland Region Food and Drink Strategy that will maximise the interaction between REP objectives.

Some key examples include:

- With considerable economic activity in the extended food industry, the **transition to carbon neutral economy** cannot be achieved without the food industry playing an active role. The European Green Deal, the Farm to Fork Strategy and Foodwise 2025 point to numerous opportunities for the entire sector, to diversify into plant-based foodstuffs, organic farming and other reduced intensity, eco-friendly food production practices.
- Strengthening the attractiveness of **the Midlands as a destination to visit** will be enabled by developing a sense of local pride in our produce. This local pride can help support the commercial viability of local food and drink enterprises such that visitors to the region encounter a vibrant and proud food culture.
- Positioning the **Midlands as an advanced manufacturing centre of excellence** will be best advanced by leveraging the Research, Development and Innovation capabilities of the region through the Empower Eco and The Cube projects.

INTERNATIONAL BEST PRACTICE

BLAS CYMRU – TASTE OF WALES

Launched in 2015, the Blas Cymru programme connects eateries, hotels and visitor attractions with the food industry. Expressed in the food tourism action plan, it is a concise and action-orientated plan, reflecting Welsh Government strategy on Tourism and Food and Drink as 'foundation sectors' with strategic importance within the economy.

Key Lessons:

- Continuous funding of a small, agile and passionate team;
- Develop a food offer for the visitors, not just the locals;
- There are interesting food stories even if a region's food heritage is weak;
- Collaboration between producers, retailers and hospitality operators is vital.

www.welshfoodanddrink.wales

ADDA MARTESANA

In 2018 the Martesana region, 20km north east of Milan on the Adda river started developing their regional food and tourism strategy. There is good land and a well-established agricultural sector but the challenge was three-fold:

1. Harness the combined strength of the region's producers;
2. To create an identity for the region's food offer;
3. To draw Milan's urban population as short-stay, weekend break tourists.

A producer group under the 'Adda Martesana' brand with agreed core values and USPs. The group identified higher profit crops and leveraged improved terms through group deals. The Strategy also recognised consumer demand for organic produce, delivering sustainability benefits and improved profits. The regional 'brand' allowed the producer group to engage local independent retailers to create 'Adda Martesana' local produce areas in-store.

Key Lessons:

1. Producers should focus on understanding and addressing consumer needs
2. Producer groups can leverage real commercial benefits.

distrettoagricoloaddamartesana.it/distretto



"FROM AN IN-DEPTH ANALYSIS OF THE MIDLAND FOOD AND DRINK ECOSYSTEM, IT IS POSSIBLE TO IDENTIFY MANY OUTSTANDING PRODUCERS, BRANDS AND SECTORAL STRENGTHS."

REGIONAL FOOD AND DRINK PROFILE

A unique food and drink culture has emerged in the Midlands. The Tullamore DEW brand has achieved global reach, as has First Ireland Spirits in Laois and Kilbeggan Distillery in Westmeath, along with many gin and craft beer producers across the Midland Region. They stand credibly alongside the other Irish regional food and drink heroes such as Dublin's Guinness, Clonakilty's Black Pudding or Waterford's Blaa. From an in-depth analysis of the Midland food and drink eco-system, it is possible to identify many outstanding producers, brands and sectoral strengths, with many Blás na hÉireann award winners.

Looking at the array of Midland producers, one can see two themes:

- Firstly, all main food categories are readily available from local producers, apart from poultry and butter.
- Secondly, there is a clear lineage back to our origins in grain, with exceptionally strong capabilities in milling, baking, distilling and now with a flourishing gin and craft brewing scene.

There are many recognised hospitality heroes across the region, with several blue book members located within the Midlands:

- The Wineport Lodge (Westmeath)
- Ballyfin Demense (Laois)
- Viewmount House (Longford)

There are also many eateries which have been commended by food critics such as the McKennas, Georgina Campbell and the Food Writers Guild, which include:

- Thyme Restaurant (Westmeath)
- The Fatted Calf (Westmeath)
- Glasson Village Restaurant (Westmeath)
- Woodfield Café (Offaly)
- Torc Café and Food Hall (Longford)
- The Pantry (Laois)
- Bowes (Laois)

Thyme Restaurant holds a Bib Gourmand and is a firm believer in local food provenance. Feargal McDonnell, chef at Athlone's Fatted Calf, is a member of Eurotoque Chef Grouping, which celebrate the very best of local food, and Andrew Rudd of Offaly's famous food family, a chef of international repute who recently established a base in Laois.

CHALLENGES FOR FOOD AND DRINK IN THE MIDLANDS

To characterise the current Midlands food offering we must understand how our unique food and drink eco-system has evolved in respect of our natural resources, our tourism proposition, our manufacturing and hospitality heroes and how we compare to best practice examples. We must also consider our exposure to events such as Brexit and the Covid-19 pandemic.

Consumer research highlighted that Midland natives have relatively low awareness of their own regional food and drink culture. Respondents can readily associate Dublin with coddle and Guinness, Armagh with apples and Wexford with strawberries but struggle to find a strong association for the 'Midlands'. Respondents loosely associate the Midlands with 'whiskey' and 'beef', indicating that it is possible for specific locations to be known for specific food and drink cultures, but these associations are more county-based and there is a need for stronger and more evocative activation at regional level.

INDUSTRY STAKEHOLDERS DESCRIBED THE MIDLAND REGION WITH

"A VERY ACTIVE BUT LOW-PROFILE FOOD AND DRINK SECTOR, WITH CLEAR OPPORTUNITIES TO DEVELOP INDUSTRY COLLABORATION, A UNIQUE FOOD PERSONALITY, HERO DISHES AND OTHER REASONS TO BELIEVE"

1. Natural Landscape and Food Heritage

The cornerstone of successful regional food strategies is their focus on the natural landscape and its resources. We can see how this works for some of Ireland's food heroes. For example, Wexford enjoys an average of 215 sunshine hours in May, versus Midland region counties averaging 190 hours. The south-east is also blessed with sandy soils which are a perfect combination for outdoor-grown strawberries or new potatoes. Equally, the unique micro-climate of Armagh is suited perfectly to apple trees, and coastal locations like Dublin and Galway Bay are famous for their seafood.

The natural environment of the Midlands is quite unique. Entirely land-locked, there is good dairy pasture and arable land in Laois but moving through the Slieve Bloom we see the predominantly acidic soils and peaty bog lands of Offaly, Westmeath and Longford. Therefore, the major 'harvest' in the Midlands has been of an inedible commodity. Peat has been widely harvested for use as a fuel source for over a thousand years.

Despite this, the region has developed some interesting food and drink traditions, the result of prevailing economic conditions as well as natural abundance and capability.



1700's

- From 1758 to 1797 government grants encouraged the carriage of grain and flour to Dublin.
- Favourable excise duties made distilling profitable for a time. For example, for a period in the late 1700's there were over 30 distilleries in Offaly alone, and 123 sites related to grain milling, malting and distilling. Peat was a plentiful resource to fuel the kilns used for drying grains and malts.
- However, excise duties were changed in 1779, leading to the closure of all but two distilleries.

1800's

- Grand and Royal Canals reach the Shannon in 1804 and 1817, providing infrastructure for Midland landlords to export grains and flour to Dublin and the rest of the British Empire, thanks to the Corn Law tariffs that made imports from outside the realm uneconomical.
- In 1823 the excise duties were changed again, and it is from this time that we can trace the founding of what would become the Tullamore DEW distillery.
- The Great Famine decimated the Midland population, with counties like Longford and Offaly seeing a 38% decline between 1841 and 1861.

1900's

- Post-famine farming also saw the decline of cereal growing and an increase in livestock rearing. Thus, Midland farming and food production was done in a context of de-population, poor quality land and small farms.
- The foundation of the Irish State, and the formation of Bord na Móna in 1964, saw peat harvesting become a significant source of income in the Midlands, partly compensating for lower incomes from farming.

INTERNATIONAL BEST PRACTICE

EMILIA ROMAGNA REGION

This Northern Italian region is the benchmark for regional food culture. It is a wealthy region, benefiting from a history of trading, banking and farming over thousands of years.

With a population of five million, 48% of the area consists of plains, home to many fruit orchards, wheat and sugar beet fields, and cattle and pig farms meaning that Emilia Romagna is Italy's most important agricultural region. The region has a history of cooperative farming and an ambition to create high-quality finished products and brands. Here are some world-famous examples, many of which have PGI status (protected geographical indication):

- Lambrusco sparkling red wine from Emilia
- Parma's Prosciutto ham
- Parmigiano Reggiano cheese from Reggio Emilia
- Balsamic vinegar from Modena
- Pancetta from Piacenza
- Mortadella from Bologna
- Tortellini from Bologna and Modena
- Barilla pasta and breads from Parma

Key Lessons:

1. Producers can work together to optimise the resources at their disposal.
2. PGI, PDO and TSG status brings immense credibility.

www.emiliaromagnaturismo.it/en/food-valley

www.bbs.unibo.eu/master-fulltime/master-in-business-management-food-wine/

TASTE THE CAUSEWAY FOOD INITIATIVE

Taste Causeway is the food and drink initiative of the Causeway Coast and Glens borough council region. The program has a lead facilitator and digital marketing resource who have built a five to 10-year vision. There is funding for the first three years, transitioning to 'Limited Company' status so that it can apply for wider funding supports. Taste Causeway builds on the Giant's Causeway and Bushmills Distillery attractions and coordinates the varied resources and supports available for food and drink businesses. They encourage collaboration and raise the profile of the region's food and drink sector capabilities.

Taste Causeway has identified three values around which its wide and varied members coalesce: Authenticity, People and Ambition. They launched with a 'Meet the Makers' event bringing together food producers and tourism businesses. Key projects include the establishment of a digitised and searchable food and drink business directory.

Key Lessons:

1. Identify your values
2. Ensure continuous funding
3. Leverage existing supports by focusing on coordination

www.tastecauseway.com

2. Tourism

Whilst agri-food contributes 8% of Ireland's GDP, out of state tourism is responsible for €5.8bn and over 6% of GDP. Tourism is vitally important to our national economy, but the Midlands economic region commands low market share with 3% of tourism visits and 2% of tourism spend. A significant opportunity exists to improve our share of tourism visits, dwell time and spend, based on harnessing an emerging food and drink culture.

The powerhouse tourism regions are Dublin with 31% of total spend, followed by the south-west with 18% and west with 14%. Each of these has a highly developed hospitality offering, high footfall and consistently strong tourist spend from which food and drink cultures can be nurtured and evolve. In this environment entrepreneurs can be creative and take risks to add layers of sophistication on a solid base of food and drink culture.

Outside of Dublin, the south-west has enjoyed decades of tourism interest and Galway has always been associated with Irish culture, language, song and dance. It has used this base to develop its hospitality offering and was named the European Region of Gastronomy in 2018 and European Capital of Culture in 2020. Further afield, Northern Ireland has always had its Giant's Causeway and Titanic legacy, it has leveraged these tourism assets to great effect. More recently, there has been a new impetus for tourism thanks to the filming of Game of Thrones, which has supported a vibrant Belfast restaurant scene.

Whilst the Midland Region has many strategic tourism assets, it has not enjoyed these tourism head-starts. Until 2018, Offaly, Laois and Longford were three of the four least visited counties in Ireland. However, a turn-around has commenced in the form of attractions such as Center Parcs, Clonmacnoise, Lough Boora Discovery Park and the newly developed Slieve Bloom Mountain Bike Trail. Throughout the Covid-19 pandemic, the Midlands has achieved a good share of voice, harnessing their sense of undiscovered serenity, a strong attribute in an era of social distancing.

The Midlands Region is in the enviable position, benefitting from two of Fáilte Ireland's tourism propositions, Ireland's Ancient East and Ireland's Hidden Heartlands, with many maximising their visibility by being part of both tourism communication campaigns.



"ENTERPRISE IRELAND ALSO FACILITATES INNOVATION WITHIN THE FOOD INDUSTRY THROUGH THE DEVELOPMENT OF R&D INFRASTRUCTURE."



3. The Brexit Challenge

There are a variety of challenges posed generally by Brexit to the Irish Agri-Food Industry, all of which apply to the Midland food and drink sector.

1. Tariffs could make importing key ingredients and exporting food and drink to the UK more expensive.
2. Free movement of goods will be impacted due to the additional administration required and could create delays and add-on costs for moving goods, even if a free trade agreement is concluded.
3. The initial stages of Brexit could see Euro to Sterling exchange rate volatility, which could make Eurozone exports more expensive for UK customers.
4. Exports into the UK will need to comply with new British standards, which could be different to the current EU standards.

Amid these uncertainties, some opportunities have emerged for Irish based food and drink manufactures to replace products that were previously manufactured in the UK and imported to Ireland. The key point for Midland food and drink enterprises is that there are wide and varied state supports available. The supports delivered by Bord Bia, Enterprise Ireland and the Local Enterprise Offices can help to mitigate the many risks:

- Customs Readiness programme provided by Bord Bia
- 'Clear Customs' training provided by Skillnet Ireland
- €9,000 'Ready for Customs Grant' for each employee managing customs clearance
- €5,000 'Be Prepared Grant' to fund relevant consulting to develop a Brexit response
- 'Act on Initiative' tailored consulting support
- 'Agile Innovation Funding' up to 50% towards €300k innovation projects
- Bord Bia's Food and Drink Brexit Action Plan
- Strategic Consultancy Grants
- Market Discovery Funds
- Brexit Mentoring
- Trading online voucher
- Financial Assistance and Micro Finance Loans
- Bord Bia's Brexit and Market Diversification webinar series



Apart from financial resilience, supply chain capacity and customs infrastructure, the key strategy for dealing with Brexit is a focus on innovation. Enterprise Ireland's role is to work with the Irish food industry in a bid to foster innovation. Enterprise Ireland works with food companies of all sizes, from high potential food start-ups to global players like Kerry Group, to help them grow their businesses through innovation. In the five-year period between 2013 and 2018, Enterprise Ireland invested €247m in its clients across the Irish food industry. This investment by the state agency has leveraged €1.5bn of investment from the industry in expansion, job creation, research and development projects, new product development and new innovations. Enterprise Ireland also facilitates innovation within the food industry through the development of R&D infrastructure. This includes the €8m Meat Technology Centre at Teagasc Ashtown, the €25m Dairy Processing Technology Innovation is key to growing Ireland's agri-food industry Centre (DPTC) in Limerick, the €50m Food for Health Ireland centre at UCD, as well as the recent €10m expansion of the food research centre at Teagasc Moorepark.

The Midland Region's food and drink supply base can currently access this cutting-edge support for innovation through Ireland's Technology Centres. These centres provide a framework for unique innovation eco-systems that have seen small and start-up companies work hand-in-hand with the Irish bases of some of the most powerful multinationals on the planet and research teams in Ireland's higher education institutes on research topics of mutual interest, identified by industry.

Technology Centres of importance to the food industry include:

- Food for Health Ireland
- The Dairy Processing Technology Centre
- The Innovation for Ireland's Energy Efficiency (I2E2) Research Centre
- The Irish Centre for Manufacturing Research

In addition, work is under way to establish a collaborative initiative to increase value from meat processing streams. New companies can join a Technology Centre at any time. Collaborations with industry receive co-funding through Enterprise Ireland.

Small food and drink companies add huge value to the region by developing our food culture and sense of product and place. These companies may not be engaged in science-led innovation, but they can still access Enterprise Ireland supports to help scale up.



1. **The Foodworks Ireland Programme** combines the contributions of Enterprise Ireland, Bord Bia and Teagasc to help Irish food entrepreneurs scale their businesses.
2. **The Regional Enterprise Development Fund** supports significant regional initiatives to build on sectoral strengths and/or to better leverage identified resources to improve enterprise capability. The fund also seeks to stimulate enterprise clustering initiatives, which are defined as structures or organised groups of independent parties designed to stimulate innovative activity through promotion, sharing of facilities and exchange of knowledge and expertise and by contributing effectively to knowledge transfer, networking, information dissemination and collaboration among the undertakings and other organisations in the connectivity.

"SMALL FOOD AND DRINK COMPANIES ADD HUGE VALUE TO THE REGION BY DEVELOPING OUR FOOD CULTURE AND SENSE OF PRODUCT AND PLACE."



"A SIGNIFICANT OPPORTUNITY EXISTS TO IMPROVE OUR SHARE OF TOURISM VISITS, DWELL TIME AND SPEND, BASED ON HARNESSING AN EMERGING FOOD AND DRINK CULTURE."



4. The Covid-19 Challenge

The Midland Region, like the rest of Ireland and the world, has been heavily impacted by the Covid-19 pandemic. The initial lockdown in March 2020 led to the almost total closure of the food service sector. Restaurants, cafés, hotels and workplace canteens were closed and hundreds of thousands of Hotel, Restaurant and Café (HORECA) sector workers found themselves unemployed overnight. Bord Bia's 2020 Food Service report suggests that the all-island food service sector will have declined by €4.5bn or -47% versus 2019. The best-case scenario forecast is for 2021 to see +41% year on year growth, but this still leaves a -€2.2bn or -26% decline for 2021 versus 2019.

Although food manufacturers were operating in a highly challenging dynamic, the home groceries sector experienced growth of 25%. This benefitted many manufacturers. Whilst, off-trade alcohol sales almost doubled, there was a national and global reduction in demand for alcohol. Online food shopping more than doubled during the first lockdown, effectively accelerating uptake by about five years. However, this did not benefit many smaller, local manufacturers who had regional listings with big supermarkets and were therefore not available in the supermarket's online range. The current absence of major events such as the Ploughing Championships, Tullamore Show, Electric Picnic and Fleadh Cheoil na hÉireann also disproportionately impacts our smaller, local producers. Smaller, high street food retailers like butchers and greengrocers saw a resurgence in demand, following 20 years of declining sales and store closures, thanks to customers avoiding queues and busy supermarkets. There was also a strong sense that shoppers should support the smaller local businesses. This has continued into 2021.

These complex trends were seen internationally, but Ireland stands out in the sheer extent of how out of home consumption shifted to take-home groceries and cooking at home. In the UK for example, take-home groceries only grew by 12%, and the food service sector stayed in-business to a much greater extent. The key learning was that Irish food service businesses were much less digitally savvy and had effectively only one sales channel. UK operators had embraced online sales much earlier and were in a better position to transition sales to home deliveries or 'Click and Collect'.

The Midland LEOs are delivering training and mentoring for a 'Post-Covid-19 Vision' and offer online trading vouchers, but it is clear that the future food and drink capability set must include a step-changed approach to omni channel selling, especially for the smaller producers and the food service sector. Further, both manufacturers and food service operators must get prepared for ongoing pandemic turbulence and an anticipated recession that will impact the domestic consumer's capacity to spend.



INTERNATIONAL BEST PRACTICE

KERRY, DINGLE AND THE IRISH NATIONAL FOOD AWARDS

Kerry attracts 13% of Ireland's overseas visitors and has evolved its food and drink sector to service the needs of this footfall. Taste Kerry promotes the county's food and drink offer as a central part of its tourism strategy:

"Through its food tourism development plan, Taste Kerry seeks to ensure that authentic tastes of place become a significant economic driver for communities and regions, while also playing a primary role in enhancing the tourist experience in Kerry."

Dingle especially has positioned itself as the go-to location for the best of fresh fish, and foodies culture via the Blás na hÉireann Awards. Many food and drink producers have emerged in this vibrant scene, such as the award-winning Murphy's Ice Cream, the Dingle Distillery, Glenbeigh Shellfish, West Kerry Brewery and the Valentia Island Farmhouse Dairy.

Key Lessons:

1. Developed a recognised brand or identity
2. Harness the combined energies of local businesses, local community and local government.

tastekerry.ie

www.dinglefood.com

www.irishfoodawards.com

FLAVOUR OF TYRONE

Tyrone had a similar challenge to the Midland Region and Flavour of Tyrone was launched in 2004, fitting in to an overall tourism strategy. They identify strong existing attractions like the 'Hill of the O'Neill' and the standing stone circles at Beaghmore. With Lough Neagh, there is a history of fresh-water inland fisheries and unique species such as the Eels and Pollan. From a food and drink point of view, the team identified that their unique strength was the warmth of welcome.

The major initiative was the 'Good Food Circle' where participating restaurants and cafés could be members based on mystery shopper audits. Members were required to have a signature 'flavour of Tyrone' dish on their menu using local ingredients.

Key Lessons:

Well ahead of its time, their success was based on asking two questions:

1. What have we got?
2. How can we champion it?

www.nigoodfood.com/producers/flavour-of-tyrone/

5. The Innovation Challenge

Consumer behaviour is fast-changing and dynamic. Trend spotters such as research company Kantar Worldpanel, work hard to highlight key shopper trends based on their consumer panel data but they are somewhat at a distance from consumers. The chronology is that individual, early-adopter consumers will always find what they want or need. This could be a new product, diet or cuisine trend. Retailers will eventually observe that shoppers are acting in a certain way, and will make range and merchandising decisions to optimise the opportunity. More consumers will then join the trend, and some time later Kantar will observe this in their panel data. The challenge for all Irish food and drink companies is to see a trend or even better, create one, as early as possible in that chronology.

Midland food and drink businesses must utilise available resources like shared kitchens, innovation hubs and Bord Bia's Thinking House library to stay abreast of these trends and convert them into their innovation efforts in the coming years. Midland food and drink producers must think about what consumers want, not just what they can produce.



Key drivers of consumer behaviours and product innovation:

VALUE: Value is the combination of quality and functionality with price. Looking at a potential global recession due to the Covid-19 pandemic, it is evident that many consumers are increasing their purchases at both ends of the value spectrum. Consumers whose income has been reduced will move from brands into private label. Some will move into 'value' tier whilst more will choose standard and premium tier private label options. Private Label already represents about six in every 10 packs that are purchased in one of Ireland's five mainstream supermarket chains. If a manufacturer wants to grow its business, then private label contracts should form part of their thinking in the coming years.

PROVENANCE: In the last recession, Irish shoppers sought to support local producers as a form of economic nationalism. We can see this trend all across Europe during the pandemic as consumers seek the reassurance that comes from familiar, locally produced products. Further, foodies especially love the authenticity of specific origin products, that link between product and place. Midland food and drink producers must find the stories and unique selling points that make their products resonate, not just in the Midlands, but nationally and overseas too.

CONVENIENCE: Consumers are increasingly searching for new ways to make food and drink more convenient. In the past 20 years, many retailers and brands have developed quick-cook convenience ranges that take the effort out of cooking. We are now seeing a huge move towards making the decision-making and purchasing process even more convenient. Retailers are cross-merchandising much more effectively now, using physical displays and proximity to sell meal solutions rather than products. The pandemic has accelerated the development in e-commerce, with retailers innovating to help consumers shop online and have groceries delivered to their door. Midland food and drink producers must think about how convenient their product is to prepare, consume, purchase and delivery channels. This will present opportunities for producers to trade directly with consumers, but it will also force brand owners and packaging designers to reconsider how their brands appear on shelf, especially if that shelf is increasingly virtual.

HEALTH: Health has long been a tool for anchoring innovation be that reduced fat, reduced sugar or salt, gluten free or probiotic. This remains true in the pandemic since consumers are actively making choices that will make them healthier, boost their vitality and improve their immune systems. Midland food and drink producers should strongly consider the health credentials of any new product development.

SUSTAINABILITY: Before the pandemic, sustainability was fast becoming the leading driver of consumer behaviour and business decision-making. The pandemic has not significantly changed this trend and shoppers are looking for food and drink that is good for the planet thanks to the sustainability of the product, the communities from which it is sourced, it's packaging and it's supply chain. Retailers are leading this charge by making significant commitments around a variety of sustainability measures such as plastic reduction, farming systems, protecting rainforests, and supply chain transparency. Some retailers will simply not trade with suppliers that are not accredited to the relevant sustainability standard so this must be a consideration for the Midland Region. Sustainability is especially relevant for the Midlands given the end of peat harvesting and move to more sustainable forms of production.

EXPLORATION: Consumers are always looking for something new and use food to explore world cuisines. One might not be able to travel right now but that doesn't mean that shoppers don't want innovative products that are inspired by tastes and cultures from around the world. The case studies have shown that regional producers must think beyond what local people will want to eat and drink, and consider what can be sold to both in-bound visitors and export markets.

CONVERGENCE: This is where more than one of the innovation trends is combined in one product. The plant-based food revolution is a good example of this since it is marketed as being better for the planet and for our health, add in some adventurous flavours and an authentic provenance story and it's a recipe for success. Midland producers should consider this in their innovation efforts.



"MIDLAND FOOD AND DRINK PRODUCERS MUST FIND THE STORIES AND UNIQUE SELLING POINTS THAT MAKE THEIR PRODUCTS RESONATE. "

"THE SIX-STEP PROCESS IS A
PROVEN METHODOLOGY
FOR STRATEGIC PLANNING."



PROJECT METHODOLOGY

The Midland Regional Food and Drink Strategy was developed utilising a six-step process as follows:

1 DIAGNOSIS



Stakeholders were engaged to discuss the Midlands food and drink sector comprising manufacturers, retailers, hospitality sector, LEOs, Bord Bia, Enterprise Ireland, Technological University of the Shannon - Midlands Midwest and consumers.

Regional food programmes were assessed both nationally and internationally.

Stakeholder insights from the Diagnosis phase informed the SWOT analysis in Step 4.

2 BRAND POSITION



Values guide decision-making and they are the key difference between a good result and a great result. The **common values** of the Midland Region food and drink industry were developed to underpin the **Vision, Mission and Purpose** of this Strategy.

3 IMMERSION



A detailed review of the Midland food and drink sector was undertaken in the context of the overall economy. This is reflected in the **Regional Food and Drink Profile, Midlands Economic Profile** (App 1) and **Challenges for Food and Drink in the Midlands Today**.

4 SWOT AND IDEATION



The insights from Step 3 were combined with Stakeholder insights from Step 1 to create actionable ideas through a SWOT Analysis.

5 STRATEGY



The ideas from Step 4 are grouped under common headings to create the **Pillars of the Strategy**. Strategy pillars are aligned with the necessary **enablers** such as values, resources and capabilities and are reflected in **Realising the Vision**.

6 PROJECT MANAGEMENT AND REPORTING



The ideas from Step 4 are grouped under common headings to create the **Pillars of the Strategy**. Strategy pillars are aligned with the necessary **enablers** such as values, resources and capabilities and are reflected in **Realising the Vision**.

The six-step process is a proven methodology for strategic planning. The diagnosis phase included the assessment of several local and international regional food strategies. These are highlighted as case studies, with key learnings, throughout the strategy document. The diagnosis phase was informed by over 30 interviews. From these it was possible to identify the big themes and individual ideas that become the foundations of the business strategy pillars and enabling actions.

SWOT ANALYSIS

In preparation of this Strategy a number of key stakeholder meetings, as well as desk and online research, was used to establish the current positioning of the Midland's Region food and drink sector. This insight is captured in the SWOT Analysis and was used to identify the key strategy pillars and detailed actions to be delivered through this Strategy.



STRENGTHS

- Perceived as unspoilt, undiscovered, a clean canvas.
- Geographically central, most connected region on the island of Ireland.
- Lower cost of rent, labour and lower cost of living relative to coastal cities.
- Access to a young, dynamic and well-educated workforce.
- Great amenities in Lough Boora Discovery Park, Corlea Trackway, Abbeyleix Bog, Emo House and Gardens, Birr Castle Demesne, Center Parcs, Slieve Bloom Mountains, River Shannon, the Grand and Royal Canals and many lakes.
- Well serviced principle towns of Athlone, Longford, Tullamore, Portlaoise, and Mullingar.
- Recognised as an international event destination through Electric Picnic, Tullamore Show, The National Ploughing Championships and Athlone Sports Arena.
- Quality food offering.
- Strong manufacturing base, e.g. Pat the Baker, Panelto, Kepak, Glenisk, Carroll's, C&D Pet Foods, Rosderra Meats, Glanbia and Odlums.
- Internationally renowned drinks brands in Tullamore DEW, Kilbeggan Whiskey and First Ireland Spirits along with a thriving craft renaissance with Brennan's Old Yard Gin, Mór Gin, Slingshot Gin, Dead Centre Brewing, Ballykilcavan Craft Beer, St Mel's and 12 Acres becoming household names over the last decade.



WEAKNESSES

- Some towns still impacted by last recession.
- Large but low-profile food and drink production sector.
- Strong manufacturers but no unique 'Midland' personality.
- Limited joined up activity.
- Start-ups struggling and limited network.
- Variable quality in café scene and limited use of locally produced food and drink.



OPPORTUNITIES

- Get the stakeholders aligned to a shared vision.
- Peer to peer networking and knowledge sharing.
- Update and digitise the MidlandsIreland.ie regional food and drink producers directory.
- Schools engagement.
- Develop a pride in regional produce.
- Develop food trails and visitor experiences.
- Diversifying the small beef farmers and examining organic transition.
- Partnering science with business and venture capital.
- Partner up with national and local retailers to enhance midland food and drink visibility.
- Capability building programme for manufacturers and hospitality businesses.
- Develop a network of vibrant farmer's markets throughout the region.
- Start telling our food and drink stories online and in social media.



THREATS

- Brexit threats to UK exporters.
- Covid-19 threats to HORECA sector especially.
- No clear USPs.
- Too many unprofitable food and drink businesses.
- Lack of long-term funding for initiatives.
- County level preferences may hinder united action.
- Hard to attract and retain talent with a fledgling food eco-system.
- Dispersed population creates lower customer footfall for food and drink businesses.
- Food and drink businesses focusing on their capabilities – rather than understanding their customer needs.
- Supports are not integrated or mapped out.



"MIDLAND FOOD AND DRINK PRODUCERS MUST THINK ABOUT WHAT CONSUMERS WANT, NOT JUST WHAT THEY CAN PRODUCE."



VISION FOR THE REGION 2030

THE MIDLANDS PROPOSITION

The success of the Midland Food and Drink Strategy will depend on galvanising unity between those immersed in the industry.

To encourage greater collaboration amongst food and drink producers in the region, key shared values were distilled down to the following:

1. **Exploring:** Harnessing our collective talent and curiosity, to explore the boundaries and discover a bright future for our food and drink producers, chefs and retailers.
2. **Nurturing:** Our region enjoys a unique diversity of uplands and lowlands, rivers, lakes and canals. From our roots in barley, beef and bog lands, we are nurturing a sustainable food and drink eco-system, that celebrates the heritage and culture of the region, whilst sustaining the environment, economy and communities, for the benefit of current and future generations.
3. **Welcoming:** A region with a welcome to experience a uniquely traditional, hearty, family flavour. Come and taste Midlands food and drink.

Based on these three core values, the following vision, mission and purpose was identified:



OUR VISION IS THAT...

THE MIDLANDS WILL BE THE **MOST SUSTAINABLE REGIONAL FOOD AND DRINK ECOSYSTEM** ON THE ISLAND, MEETING 2050 ENVIRONMENT NEUTRAL TARGETS BY 2030.



OUR MISSION IS TO...

CREATE **A UNIFIED MOVEMENT** TO STEP-CHANGE THE **SUSTAINABILITY, EXCELLENCE, VISIBILITY, PRIDE AND ECONOMIC IMPACT** OF OUR UNIQUE MIDLANDS FOOD AND DRINK PROPOSITION.



OUR PURPOSE IS TO...

PROMOTE **INDIGENOUS CONSUMPTION, EXPORTS AND VISITOR ENGAGEMENT** THROUGH **EDUCATION, MARKETING, BUSINESS SUPPORTS** AND **CONTINUOUS IMPROVEMENT**, FOCUSING ON OUR **SUSTAINABILITY CREDENTIALS**.



KEY OPPORTUNITIES

The key opportunities to grow the Midlands food and drink were identified through stakeholder engagement as follows:

1. Increased indigenous consumption

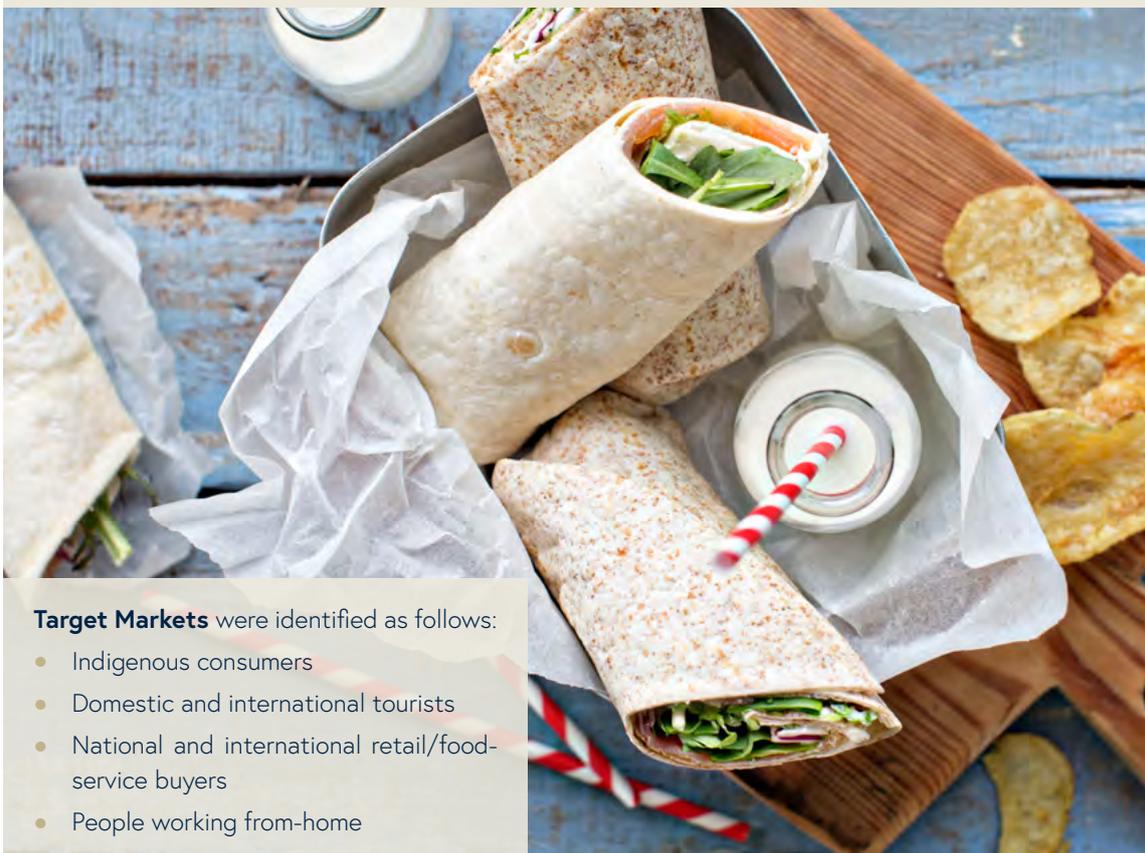
- More local products in the trolleys of more local shoppers
- More local products on the menu of local hospitality establishments

2. Increased innovation, growing market share and exports

- Embracing innovation in production practices – leaner practices
- More products nationally listed in retail chains and food service distributors
- More regional products exported to UK/EU/MEA

3. Increased footfall within Midland Region

- Highlight tourism destinations to drive increased in-bound footfall
- Capture cross-country stop-off traffic
- Reduced commuting, remote work and work from home because of Covid-19



Target Markets were identified as follows:

- Indigenous consumers
- Domestic and international tourists
- National and international retail/food-service buyers
- People working from-home

By identifying target markets, one can increase and strive to maximise economic activity. Increased demand will lead to increased sales. Increased supply will need to be supported by increased employment. Improved employment improves spending power, so there is a virtuous circle of economic activity.

Identifying target markets also allows the region to optimise the impact of its finite resources, especially in marketing and communications. By talking specifically to the audiences that are most likely to buy into the Midlands value proposition we maximise the impact of communications activity and spend.

"BY IDENTIFYING TARGET
MARKETS, ONE CAN INCREASE
AND STRIVE TO MAXIMISE
ECONOMIC ACTIVITY. "





"THE OBJECTIVE OF THIS PILLAR IS TO BUILD A MORE SUSTAINABLE FOOD AND DRINK ECOSYSTEM IN THE MIDLANDS."



REALISING THE VISION: STRATEGIC PILLARS AND ENABLERS

This Strategy focuses on strengthening the region's food and drink sector through four strategic pillars:

1 SUSTAINABILITY
Building a more sustainable food and drink eco-system in the Midlands

2 AWARENESS
Developing local awareness and pride in Midlands food and drink

3 EXPORT CAPABILITY
Building capability to support export readiness

4 FOOD TOURISM
Developing a food and drink culture to create evocative visitor experience

STRATEGIC PILLARS

1. Sustainability

The objective of this pillar is to build a more sustainable food and drink eco-system in the Midlands. The Foodwise 2025 plan states that environmental protection is as important as economic competitiveness. The Midlands wider food and drink sector has the opportunity to buy into and support the existing schemes and partnerships such as:

- Sustainable food and drink supply chains through Bord Bia's Origin Green
- Packaging Recycling through Repak
- Sustainable Energy usage through the SEAI
- Reducing eco-system impact through Biodiversity Ireland's events and training
- Holistic approaches to sustainability and Corporate and Social Responsibility (CSR) through BITC (Business in the Community)

Post-Covid-19, the European Commission has identified sustainability as the key driver of economic recovery. It is a major opportunity for food businesses given the consumer demand for clean, eco-friendly, organic, and sustainable foods and food supply chains.

- With the European Commission launching the 'Green Deal' Strategy for Europe to become environment neutral by 2050, opportunities exist to progress projects through the Premier Lakelands Food Hub, Empower Eco, and The Cube. The Midland Food and Drink Strategy Working Group will continue to create and maintain this momentum, potentially with the expert support of a pillar-specific sustainability working group scoping ways for the Midland Region food and drink industry to position itself as a best practice 'green deal zone' with ambitious and accelerated plans to be environment neutral by 2030. The specific initiatives should be scoped by sustainability experts. Companies can advance their sustainability agenda through a lean focus. This approach helps companies to be less wasteful, giving them a commercial competitive edge whilst being more sustainable.



- The Midlands are also strongly active in beef farming, but with sustainability in mind, there is an opportunity to re-position the region in sustainable beef production, based on organic transition or 100% grass-fed systems. With a beef cattle population of over 120,000 head in the four counties, there is sufficient scale for commercialisation of a sustainable, differentiated offer with a specific identity, effectively a re-brand for the 'Mullingar Heifer'. For farmers that don't make a full transition to 100% grass fed or organic, there remains the opportunity to reduce emissions through the Origin Green's Sustainable Beef and Lamb Assurance Scheme (SBLAS) and Sustainable Dairy Assurance Scheme (SDAS).
- The Cube, Laois's low carbon centre of excellence, a resource for guidance, best practice and learning for Midland food and drink businesses.
- Empower Eco will act as a best-practice example of how a region can develop and deliver a vision for eco-innovation research, entrepreneurship, training and social innovation. This new multi-agency eco-system will act as a test-bed by harnessing collaboration to foster more sustainably based enterprises.
- Premier Lakelands Food Hub will promote the concept of sustainably grown local food production and provide a support environment for the creation and development of new micro-food enterprises.

2. Awareness

The objective of this pillar is to develop local awareness and pride in Midlands food and drink. For the Strategy to be successful, it will be vital that all food stakeholders and the public, understand what the Midlands has to offer as a food and drink region. There is significant potential to grow the awareness of, and pride in, local Midlands food and drink.

- The Midlands has a rich variety of food and drink producers in the region. The first task will be to update and digitise the Midlands Food and Drink Directory. The directory will be used to build a bank of material exposing the stories behind the food and drink brands that are produced on our doorsteps. These stories can act as a call to action for consumers to buy these products when they see them on the restaurant menu or the supermarket shelf. This can be strengthened further by deploying bespoke point of sale material at the shelf edge in supermarkets.
- A reputation strategy will be created using food ambassadors to highlight our unique products, building on the previous work of Fáilte Ireland Regional Food Ambassadors. The manufacturing and hospitality sector can be incentivised in a competitive process to create a hero dish, or hero product for the Midlands. The reputation strategy could also include an events calendar and a specific 'Year of Food and Drink' with exciting events and PR activities for both manufacturers and

"THERE IS SIGNIFICANT POTENTIAL TO GROW THE AWARENESS OF, AND PRIDE IN, LOCAL MIDLANDS FOOD AND DRINK. "





"... IT WILL BE VITAL THAT ALL FOOD STAKEHOLDERS AND THE PUBLIC, UNDERSTAND WHAT THE MIDLANDS HAS TO OFFER..."

hospitality operators. This year-long campaign can be coordinated at regional level but can also work with the county level initiatives. Consumers respond well to third-party endorsements so it will be important to encourage our producers to enter the existing food awards programmes.

- Many other regions have deployed 'Buy Local' campaigns, and this Strategy includes a 'Buy Midlands Food and Drink' campaign in conjunction with supermarkets, supported by POS, media, offers, rewards etc.
- Our focus groups demonstrated that, a key consideration at the shelf-edge is "will the kids eat it?" Many participants stated that they would love to support more local food and drink brands but that if the kids didn't like it, it would be wasted. Consideration should be given to a schools engagement programme where kids can learn about how food is produced, how waste can be avoided, how their personal habits impact the environment, but also to start building their awareness of local produce.
- To build on this momentum, there is potential to produce a book 'A Celebration of Midland Food and Drink'. This would highlight Midland food and drink heroes, sharing unique recipes from the talented chefs and foodies in Torc, Thyme Restaurant, Ballyfin Demense, The Wineport Lodge, Muller and O'Connell, Durrow Mills and many more. This is also an opportunity to tell the regional food story, to educate people on our unique heritage in grain milling, malting, distilling, brewing and baking.

The Midland Region undoubtedly has much work to do in forming an identifiable food culture or regional food brand/identity but much of this can start with our own Midland communities. Our research showed that, pre Covid-19, Midland inhabitants were eating food out of home, on average less than 11 times per month. That is 11 opportunities every month for our own inhabitants to see a menu with Midland foods and signature Midland dishes highlighted. Crucially, for commuters, many of these 'out of home' meal occasions were actually executed outside the Midland region.

As a consequence of public health guidance, working from home is now much more prevalent, so there is an opportunity for more of these meals to positively impact the local economy.



3. Export Capability

The objective of this pillar is to build capability to support export trade. While we continue to raise the profile of our food and drink sector, it is crucial that our food and drink businesses have the tools and supports they need to sell nationally and internationally. In line with Foodwise 2025, exporting is key to the long-term success of the food and drink industry since companies that export have greater economic impact.

Under this Pillar the aim is to leverage the expert support of Enterprise Ireland and the international reach of Bord Bia to prioritise export opportunities and find new customers in strategic markets worldwide by:

- Building national/global recognition of the region's excellence in food and drink.
 - Facilitating more food and drink companies to export for the first time.
 - Opening new markets to the region.
 - Building the export capacity and capability of the sector through increased skills and innovation.
- The first priority will be to establish a pillar-specific working group comprising business owners who have experience in scaling and internationalising businesses. The role of this board will be to create a Midland Food and Drink Expo, potentially in 2022, to engage national and international buyers. It will be crucial to manage this in conjunction with our 'Nurturing Capability' enabler since producers will do better deals if they have been trained to sell and negotiate effectively. Large producers like Tullamore DEW, Kilbeggan, Glanbia and Panelto can play a significant role in sharing their experience of export market development. To achieve maximum impact, we should promote a B2B identity for Midland food and drink producers in co-operation with [MidlandsIreland.ie](https://www.midlandsireland.ie).
 - Explore opportunities for Technological University of the Shannon – Midlands Midwest to act as a focal point for food and drink enterprise cluster groups or forums.
 - Explore opportunities to sell the Midlands food and drink proposition on a national and international stage. This could take the form of a Midlands food and drink presence at the Bloom Festival or at international events like PLMA (the Private Label Manufacturers Association Expo) or Anuga (the Allgemeine Nahrungs- und Genussmittel-Ausstellung) which is one of the world's largest food and beverage fayres.
 - Nurture collaboration on the challenge of routes to market for local producers looking to move beyond their county.
 - Explore opportunities to create a 'Dragons Den' style investment competition for Midland food and drink companies.

4. Food Tourism

The objective of this pillar is to develop evocative food and drink visitor experiences that will attract tourism. Building on the foundations established in pillars one and two, we must leverage this in how we attract visitors and give them options to spend money. This pillar must integrate with the hospitality standards programme to highlight the quality and variety of restaurants and cafés since many visitors will chose a destination largely on their options to eat and drink unique and high-quality produce.

- The Strategy will encourage the development of a network of vibrant farmers markets in all four counties. Farmers markets offer an accessible point of entry for farmers who wish to diversify their business activities. New food and drink entrepreneurs can also test market their products at the markets. Producers will be encouraged to develop visitor experiences for tourists to 'meet the makers'. These activities can form the basis of multiple Midland food and drink discovery trails. There is a significant opportunity to differentiate the Midlands by bringing sustainability into the tourism offer via agri-food eco-tourism attractions.
- Midland food and drink must remain front and centre at all the major events and tourist destinations such as Center Parcs, the Tullamore Show, Electric Picnic and the Ploughing Championships since these attract significant visitor numbers from outside the region.
- Building on our heritage in milling and distilling, the Midlands should aim to host an international awards event such as the ISC (International Spirits Challenge), World Whiskies Awards or Bakery Industry Awards. These events give a reason for both national and international journalists to visit the region, write about our food and drink cultural revolution, and share the story widely.



"... EXPORTING IS KEY TO THE LONG-TERM SUCCESS OF THE FOOD AND DRINK INDUSTRY..."



ENABLING ACTIVITIES

To create the conditions that will allow the pillar activities to be executed, the following have been identified as enablers:

1 ALLOCATING RESOURCES

2 COLLABORATION

3 FOSTERING INNOVATION AND NURTURING CAPABILITY

1. Allocating Resources

The first activity in implementing this Strategy will be to secure resources to appoint a dedicated Programme Manager to coordinate the Food and Drink Strategy for the region. This programme manager will be responsible for delivery of the plan and will be given visibility of a 3-year funding plan and a brief to create a sustainably funded entity from year four onwards.

2. Collaboration

The Programme Manager will be tasked with engagement with the producers of all scales and food categories, and the extensive support network that exists within the region, such as Enterprise Ireland, the LEOs, Technological University of the Shannon – Midlands Midwest and Regional Skills Forum. Ensuring 'buy in' will be crucial in delivering on the vision.

- A Business to Business Network will be established for the food sector in the Midlands. This network will enable the formation of smaller forums or clubs where non-competing businesses can share best practice and learn from each other.
- Sector groups will also enable the appointment of buddy companies, where smaller enterprises can be mentored and guided by bigger enterprises. Companies with common needs can cooperate to leverage advantage, for example, by increasing their buying power for ingredients, packaging, components or utility cost inputs.





3. Fostering Innovation and Nurturing Capability

A mindset of innovation combined with problem solving capability will benefit all four strategy pillars. Much support is already available for enterprises spanning start-ups to global exporters. Opportunities exist to harness these supports and enhance them further.

- A supports map should be created to demystify the access to training supports and funding programmes for all scales of enterprise.
- Midland food and drink manufacturers and hospitality sector operators will be surveyed to assess skills gaps. Capability training will be provided to address these deficits in co-operation with Technological University of the Shannon – Midlands Midwest, Fáilte Ireland, Regional Skills Forum and the ETBs as appropriate.
- Establishing this base of ability will become the foundation upon which we build a hospitality standards programme. This will be independently assessed via mystery shopper to an agreed criteria and businesses that reach the mark will be able to display the 'Midland Food and Drink Excellence' plaque at their premises and on communications material. A basic requirement of the programme will be that Hotel, Restaurant and Café (HORECA) businesses include a signature 'Midland food/drink dish' on their menu and will buy an agreed percentage of ingredient inputs from local Midland manufacturers.
- For established manufacturers, the key capability builds will be around strategy, commercial, selling and negotiation skills. For start-ups and early stage manufacturers we will leverage the resource within the regional shared kitchens and food incubator hubs, strengthening coordination of activities such as funding applications, and sharing expertise and resources such as laboratories between the hubs. The Local Enterprise Offices in the region are well positioned to assist and guide start-ups and provide training in partnership with Bord Bia and the various retailer sponsored programmes.
- Developing capability will depend on increasing awareness of the existing food research and packaging expertise that is available from Technological University of the Shannon – Midlands Midwest Polymer Gateway and Research Centres, which may be accessed through Enterprise Ireland Innovation Vouchers.



MIDLANDS FOOD AND DRINK STRATEGY – AN OVERVIEW

GOAL: To drive economic growth, build economic resilience and foster innovation

STRATEGIC PILLAR	SUSTAINABILITY	AWARENESS	EXPORT CAPABILITY	FOOD TOURISM
ENABLERS	<p>RESOURCES: Appoint Programme Manager Pre-approved three year funding plan Brief to develop sustainable multi-year funding thereafter</p> <p>COLLABORATION: Engage producers and support network Industry buy-in to strategy B2B identity for Midland F&D industry briefing Establish forums and sector groups for knowledge sharing Buddy mentoring programme Leverage B2B group on procurement</p> <p>FOSTERING INNOVATION AND NURTURING CAPABILITY: Skills Assessment and Capability Training through Midland Regional Skills Forum HORECA Standards Programme Commercial skills pre-buyer meetings Coordination of shared kitchens and food innovation hubs leveraging Technological University of the Shannon - Midlands Midwest and industry forums to support Innovation Awards Awareness of opportunities for Technological University of the Shannon - Midlands Midwest and industry engagement on research-led innovation Integration sector supports map</p>			
PILLAR ACTIVITIES 2021-2024	<ul style="list-style-type: none"> • Create sustainability working group • Scope a 'Green Zone' plan for industry to hit 2050 targets by 2030 including competitive edge/ lean projects. • Consumer-focused plan – food waste, plastic, food miles etc. • Sustainable farming plan • Support the 'Empower Eco' and 'The Cube' initiatives 	<ul style="list-style-type: none"> • Updated and digitised Midland Food Directory • 'Midland Food Stories' social and PR • F&D ambassadors to co-create plan for 'hero dish', awards entries and a Midland Year of F&D • 'Buy Midlands F&D' campaign • Schools engagement program • A Celebration of Midland Food and Drink Cookbook 	<ul style="list-style-type: none"> • Midland F&D expo • Explore opportunities for Technological University of the Shannon - Midlands Midwest to be a focal point for company/sector clusters. • Explore opportunities to go beyond the region via national events (like Bloom) and international events like Anuga/ PLMA • Midland F&D Dragons 	<ul style="list-style-type: none"> • Establish a vibrant farmers' market in each county • Develop multiple F&D discovery trails • Dial up agri-food eco-tourism and align with existing infrastructure and amenities • Leverage large events to showcase Midland F&D • Host international awards (distilling/ baking)



MIDLAND REGIONAL FOOD AND DRINK STRATEGY – IMPLEMENTATION PLAN (ENABLERS)

	OBJECTIVE	ACTIVITY	LEAD
ALLOCATING RESOURCES			
1.1	Create a dedicated central resource, outside of the industry players, to coordinate activity across stakeholders and maintain momentum	Secure funding and appoint Regional Midland Food and Drink Programme Manager	Food & Drink working group
1.2	Achieve long-term visibility of funding	Establish an integrated sustainable funding plan	Regional Food & Drink Programme Manager
COLLABORATION			
2.1	Industry Engagement and Buy-in	Arrange comms and briefing sessions to establish links, re-engage contributing stakeholders and wider industry	Regional Food & Drink Programme Manager
2.2	Harness combined strengths of the sector	Establish a Midlands F&D Business Cluster, for knowledge sharing in the F&D Sector	Regional Food & Drink Programme Manager
		Identify and launch projects to leverage the combined power of the Midland F&D sector e.g. purchasing/procurement	Technological University of the Shannon – Midlands Midwest Enterprise Ireland
		Create sector groups for HORECA and Manufacturing	LEOs Bord Bia
		Create industry buddies where smaller companies can learn from larger enterprises	Fáilte Ireland Bord Bia MREP
FOSTERING INNOVATION AND NURTURING CAPABILITY			
3.1	Identify and address skills deficits within F&D sector	Skills Assessment and Training Plan	Midlands Regional Skills Forum, LEOs, Technological University of the Shannon – Midlands Midwest & ETBs
3.2	Improve hospitality standards, increase local pride, increase buying of locally produced F&D	Create and roll-out a HORECA standards programme to be audited by mystery shoppers and awarded with an 'excellence' award. Programme will include a 'signature' dish	Fáilte Ireland, Technological University of the Shannon – Midlands Midwest, Bord Bia

continued

	OBJECTIVE	ACTIVITY	LEAD
3.3	Build basic commercial selling and negotiation skills of manufacturers	Anticipated Training: Meet the buyer/ Routes to Market / Selling Skills / Negotiation Skills / Market Insights	RSF / LEOs / ETBs
3.4	Harness full combined strength of the regional food and drink incubator hubs	Develop hub strategy to pool resources, coordinate funding applications, share best practice and knowledge and increasing awareness of the incubator hubs.	Regional Food & Drink Programme Manager Regional Food Hubs
		Laboratory and Technical Services support for hubs and larger enterprises. Innovation capability supports for producers.	Technological University of the Shannon – Midlands Midwest
3.5	Nurture a culture of innovation in every aspect of Midland Food and Drink	Encourage engagement in existing supports, especially LEO and Enterprise Ireland structures. Explore feasibility of an annual Midland Innovation Awards programme to reward companies and individuals pushing boundaries in areas of food and drink manufacturing, hospitality, product development, sustainability and food tourism. Consider inclusion within existing business Chambers Awards/LEO County Awards	Enterprise Ireland & LEOs
3.6	Harness role of Third Level Sector	Utilise Technological University of the Shannon – Midlands Midwest and Carlow Institute of Technology as a resources for developing unique and research-led products especially in the areas of food research, consumer research, polymer research, packaging and hospitality excellence.	Technological University of the Shannon – Midlands Midwest Carlow IoT Regional Food Hubs

MIDLAND REGIONAL FOOD AND DRINK STRATEGY – IMPLEMENTATION PLAN (PILLARS)

	OBJECTIVE	ACTIVITY	LEAD
SUSTAINABILITY			
4.1	Fast-track sustainability projects within Midland F&D sector to create a 'Green Zone' to hit 2050 targets by 2030	Explore the formation of a pillar specific Midland F&D sustainability working group to drive projects within this pillar	Regional Food & Drink Working Group
4.2	Deliver industry-focused sustainability goals	Integrated eco/food strategy including CO ₂ footprint, water and soil quality, biodiversity, food waste, plastic reduction, food miles, eco-energy plan to include bio, wind and solar	Regional Food & Drink Working Group
		Explore role of The Cube, Laois's low carbon centre of excellence, especially as a source of best practice and learning for Midland food and drink businesses	
		Support the Empower Eco initiative	Enterprise Ireland
4.3	Transform consumer behaviour to create a region of green ambassadors	Lean business and competitive edge programme to support producers to save resources and money, delivering commercial and sustainability objectives	Regional Skills Forum/ Enterprise Ireland / LEOs
		Green Consumer plan to include eco-awareness campaign e.g. The Year of Sustainable Food and Drink, Grow Your Own - Community Farming and schools projects	Enterprise Ireland / LEOs / Bord Bia / Local Food Market Promotion
4.4	Improve on-farm profitability and deliver sustainability goals	Explore beef diversification options	Regional Food & Drink Working Group, Teagasc
		Scope an organic transition plan	Teagasc / Macra na Feirme/ Local Development Companies

	OBJECTIVE	ACTIVITY	LEAD
AWARENESS			
5.1	Increase local pride, awareness and sales of Midland Food and Drink	Updated and online searchable F&D Directory Create a Midland F&D marketing plan to include producer stories, menu activations, in-store POS material, event calendars Identify food and drink ambassadors to co-create and deliver a reputation strategy. Encourage Midland F&D producers to enter the existing awards like Blás na hÉireann and Great Taste Buy local Midland F&D Campaign Schools engagement project The Book of Midland F&D - "A celebration of our heritage, our producers, products and cuisine"	Regional Food & Drink Programme Manager Regional Food and Drink Working Group Ambassador
EXPORT CAPABILITY			
6.1	Harness existing supports, skills and experience of scaled F&D companies to drive national and international sales	Convene a board of industry leaders as a pillar specific working group. Harness the strength and experience of major players like Tullamore DEW and create a Midland Food and Drink Expo to attract national and international buyers. Create a B2B identity for Midland F&D sector companies Explore industry engagement options for Technological University of the Shannon – Midlands Midwest and the potential to act as a focal point for food and drink cluster groups/forums Explore opportunities for enhanced Midland Food and Drink presence and identity at events like Bloom Festival and PLMA/Anuga Explore collaboration on developing routes to market	Regional Food & Drink Programme Manager Regional Skills Forum Bord Bia LEOs Enterprise Ireland
6.2	Create competitive and investment oriented eco-system	Explore Midland Food Dragons opportunity to create investment opportunities and increase profile	Regional Food & Drink Programme Manager Regional Food & Drink Working Group

	OBJECTIVE	ACTIVITY	LEAD
FOOD TOURISM			
7.1	Create a top-class ground level food and drink eco-system through bustling food markets	Create a network of vibrant county level farmers/food markets where visitors can engage and meet the makers Give a point of entry for F&D entrepreneurs, test-market capability, farmer diversification potential, visitor engagement opportunities	Local Authorities / Enterprise Ireland / Bord Bia and Teagasc
7.2	Engage visitors with an evocative and unique F&D proposition, leveraging existing high-profile events	Develop and market multiple food and drink discovery trails to align with existing infrastructure and amenities. Engage and collaborate with existing tourist attractions in Center Parcs, Lough Boora Discovery Park, Emo Park and Gardens, Shannon Waterway etc. Explore opportunities for agri-food eco-tourism to help dial up our sustainability message.	Tourism Officers / Fáilte Ireland
		Central positioning of Midland F&D at large events such as Electric Picnic, Ploughing Championships, Fleadh Cheoil, Bloom etc	
7.3	Create reason for national and international journalists to discover the Midland F&D eco-system	Hosting national and International food and drink awards	Tourism Officers / Fáilte Ireland/ Bord Bia / Irish Food Writers Guild



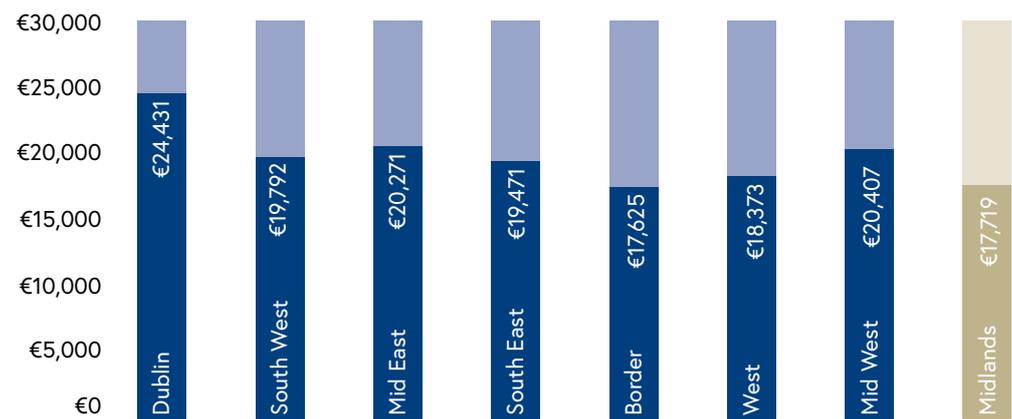
APPENDIX 1: MIDLANDS ECONOMIC PROFILE

The food and drink sector contributes significantly to employment the region, both directly and indirectly, supports jobs across additional sectors including Manufacturing Industry, Agriculture and Fisheries, Wholesale and Retail, Transportation and Storage, Accommodation and Food Service and Professional, Scientific and Technical sectors, so the contribution of the food and drink sector to the Midland Region economy cannot be underestimated.

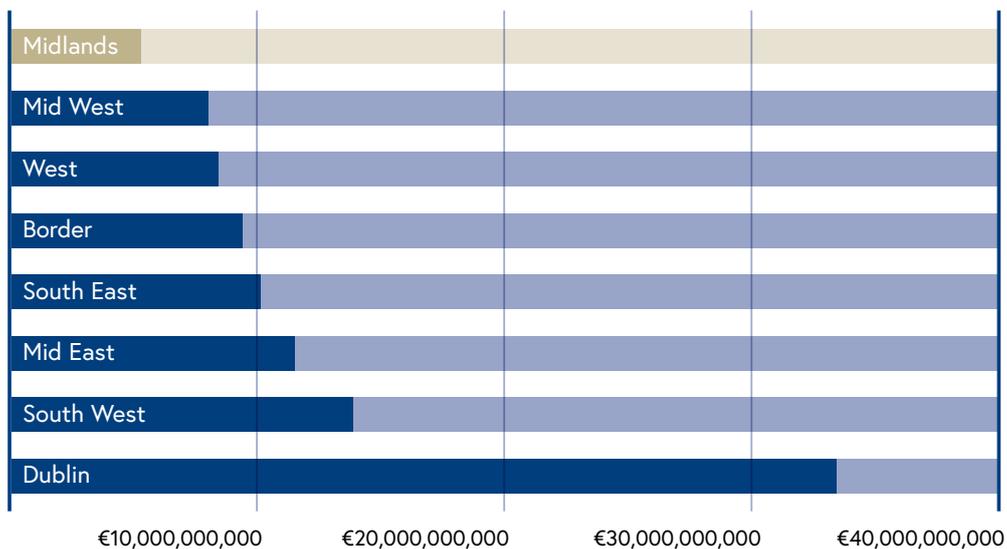
The Midland region is home to many food and drink manufacturers, who purchase a portion of their ingredients and components locally and sell a portion of their end-products in shops and restaurants locally.

1. Disposable Income

Disposable Income €/person by region



Total Disposable Income € (population x €DI/Person)

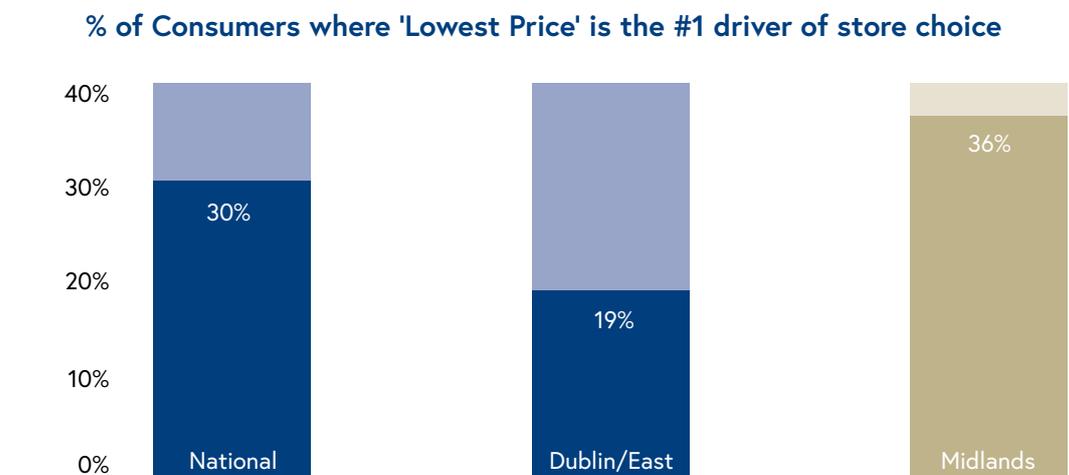
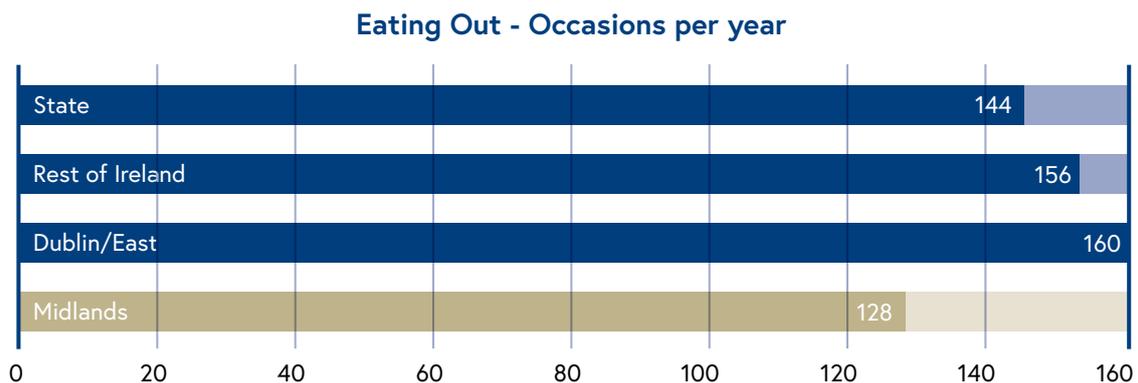


CSO data for 2019 demonstrated that the region had an average disposable income of €17,719 per person when weighted by population, the second lowest of all regions except the border. Based on its relatively low population, the region has the lowest total disposable income of all regions.

2. Price Sensitivity

It appears that the Midland region's low disposable income is expressed in a degree of price sensitivity. Consumers were engaged via two online surveys and a series of two focus groups, highlighting the following key insights:

1. Midland consumers eat out less frequently than those in Dublin or East Coast areas. For example, consumers in Dublin eat out 160 times per year, whilst Midland consumers eat out 128 times.
2. 36% of Midland Consumers stated that 'lowest prices' was their first or second most important factor in selecting their supermarket of choice. This compares with a national average of 30% and a Dublin/East score of 19% and suggests a reasonable price sensitivity in the Midland Region.
3. Midland consumers state a preference for buying 'local' foods and supporting local suppliers but are less willing to pay a premium for this enhanced provenance.



NOTE: Total sample size 248

APPENDIX 2: WORKING GROUP MEMBERS

- Vincent Cleary, Managing Director, Glenisk, Co-Chair
- Evelyn Reddin, Head of Enterprise, LEO Laois, Co-Chair
- Sarah Morgan, Programme Manager, Midlands Regional Enterprise Development Office
- James Maloney, Senior Regional Development Executive, Enterprise Ireland
- Declan Coppinger, Marketing Finance Manager at Bord Bia
- Caren Caruthers, Programme Officer – Ireland's Ancient East at Fáilte Ireland
- Sarah McCarthy, Programme Officer – Ireland's Hidden Heartlands at Fáilte Ireland
- John Costello, Midland Regional Skills Forum Manager
- Anthony Johnston, Head of Department – Hospitality, Tourism and Leisure, Technological University of the Shannon – Midlands Midwest
- Liam Tutty, Dead Centre Brewing





APPENDIX 3: CONTRIBUTING STAKEHOLDERS

- Blás na hÉireann Food Awards
- Adda Martesana Italy Food Strategy
- Tyrone Food Circle
- Food NI
- Causeway Coast Food Initiative
- Technological University of the Shannon – Midlands Midwest
- Ballykilcavan Brewery
- Athlone Food Festival
- Blas Cymru Welsh Food Strategy
- Fáilte Ireland
- LEO Laois
- LEO Longford
- LEO Offaly
- LEO Westmeath
- Bord Bia
- Enterprise Ireland
- Tullamore DEW
- Carroll's Meats
- Dawn Meats
- Bord na Móna
- Epicom
- G's Gourmet Jams
- Glenisk
- Mr Crumb
- Wild Irish Foragers
- Coffee Hut
- Thyme Restaurant
- Limerick Urban Co-op
- Tesco Ireland
- Aldi Ireland
- Lidl Ireland
- SuperValu
- Tullamore Farmer's Market
- Durrow Mills
- Boyne Valley Food Hub and Accelerator
- Bia Innovator Campus Galway
- Ferbane Food Campus





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PHOTOGRAPHY

BY JOANNE MURPHY

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Supported by the LEOs in Laois,
Longford, Offaly and Westmeath.



Údarás Áitiúla Éireann
Local Authorities Ireland



**Midlands European Structural and
Development Funds Programmes
2014-2020**
Co-funded by the Irish Government
and the European Union



European Union
**European Regional
Development Fund**