



Presentation to the
Northern Ireland Assembly Business Trust

May 2012

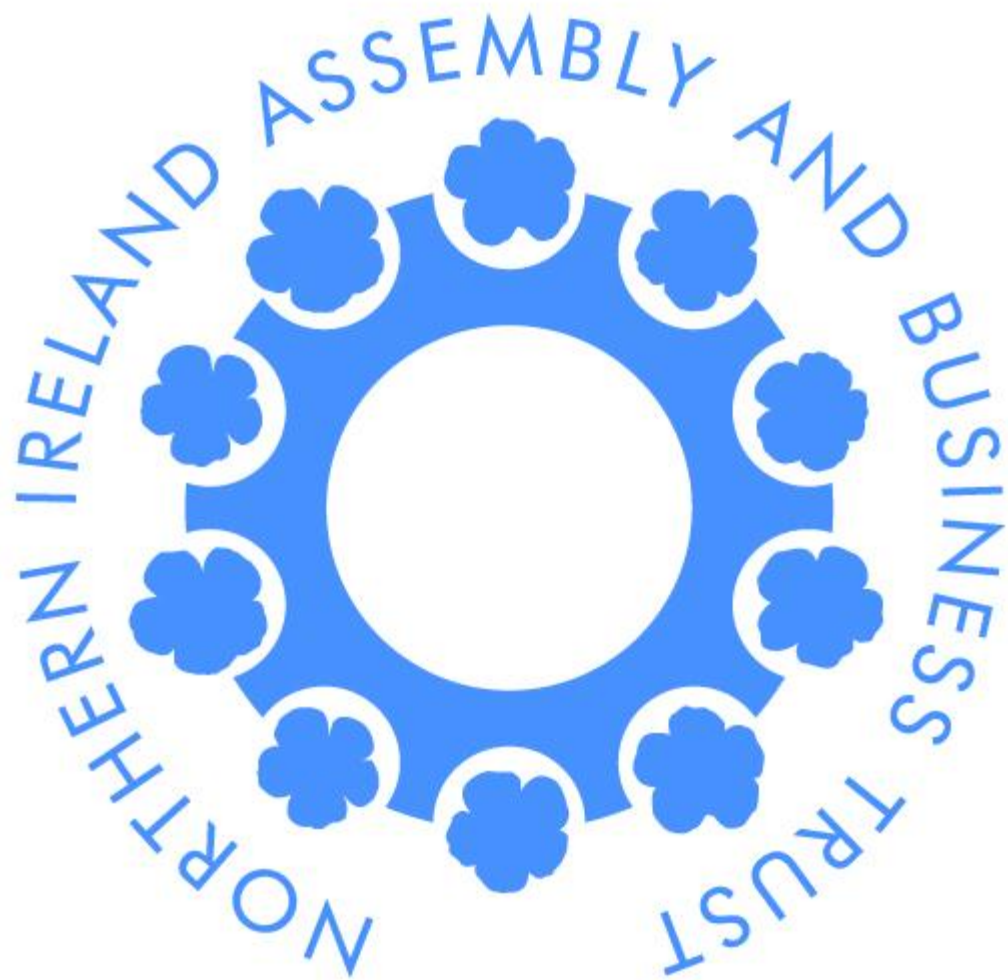
By

Michael Bell

Executive Director

Northern Ireland Food and Drink Association Ltd





Member



- Who are we
- What are our Market opportunities
- National/International Context
- What are competitors doing
- Economic impact of growth in agri-food
- Role of Banking Sector



- **Who are we**
- What are our Market opportunities
- National/International Context
- What are competitors doing
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- Role of Banking Sector

**NIFDA's vision is a strong and united membership,
working together towards a sustainable and growing
internationally competitive food and drink industry
in Northern Ireland.**

NIFDA Mission

- **To be a source of information that is valued by members**
- **To be the 'Voice' of our members that it is respected and listened to by government and other key stakeholders.**
- **To collectively develop with our members pan-industry strategies that support our members' endeavours.**
- **To facilitate members business network development, including member to member support and development networks.**





- £300k spent on Livestock Chain Management project
- £55k invested in NIFCC at start
- Ten years on NIFCC board.
- NIFDA was the primary driver behind NIFCC
- Savings to the agri-food community circa £3m to date



AGRI-FOOD QUEST | Strength through Research

knowledge | science | technology

Agri-Food Quest is a membership-based, industry-led research community working in partnership towards strengthening the international competitive position of the agri-food sector in Northern Ireland.

Stephane Durand, Moy Park
Michael Bell, NIFDA
Eamonn Donnelly, Dale Farm
Jonathan Birnie, Dunbia
Richard Horton, Carritech
Chris Elliott, Queen's University
Peter Mitchell, University of Ulster
Joel Ferguson, AFBI

Andrew Baxter, Agri-Food QUEST



NORTHERN IRELAND
FOOD & DRINK
AWARDS
2011
Food
&
Drink
Awards

Outstanding Contribution to NI Food and Drink
O'Kane OBE



NORTHERN
IRELAND
FOOD & DRINK
AWARDS
2011
ULSTER BANK
OUTSTANDING CONTRIBUTION
TO NI FOOD AND DRINK AWARD
Sponsored by
Ulster Bank
WINNER
O'Kane OBE
Poultry



FOOD & DRINK

Northern Ireland
**Food
&
Drink**
Awards 2011

Northern Ireland
Food & Drink Awards 2011

NORTHERN
IRELAND
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NORTHERN IRELAND FOOD & DRINK

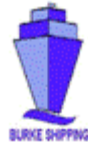



Agri-research
(Ireland) Ltd



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FOOD IMPORTERS AND BROKERS SINCE 1891



Carson
McDowell

Cefetra



diamond
recruitment group



DSM



Dungannon
Proteins



NORTHERN IRELAND FOOD & DRINK




Golden Cow Dairies



Goulding NI



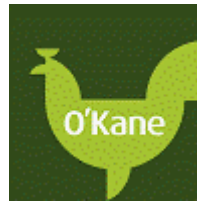
NORTHERN IRELAND FOOD & DRINK



Northern Bank



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NORTHERN IRELAND FOOD & DRINK



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Feed Ingredients


WD MEATS
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SINCE 1841




WILSON'S W & R Barnett Ltd
COUNTRY




interfrigo
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AECOM


HEAVEY
TECHNOLOGY

Are we really world class?

UK Chilled Foods Manufacturing Company of the Year 2011
Mash Direct.



McCartney's of Moira



Robert Ditty : UK Baker of the Year 2011



Dale Farm : **7 Gold star awards**



Punjana: **9 Gold Medals**



Communications



17th February 2011 Feeding Talent Conference

FANCY A CAREER WITHIN
THE FOOD & DRINK
MANUFACTURING INDUSTRY?

**tasty
CAREERS**
in food & drink

USE
YOUR
LOAF!

JUICY
JOBS!

LAND
BUTTER
SIDE UP!



NIFDA 2012 bursary winner: Natasha Rooney



Reports.....

- 1999, 256 pages
- 2000, 88 pages
- 2004, 62 pages
- 2005, 126 pages
- 2006, 60 pages
- 2007, 94 pages
- 2008, 192 pages
- 2010, 43 pages

Total 921 pages



FOCUS ON FOOD

A PARTNERSHIP STRATEGY FOR THE
FOOD INDUSTRY IN NORTHERN IRELAND

May 2010





- Who are we
- What are our Market opportunities**
- National/International Context
- What are competitors doing
- Economic impact of growth in agri-food
- Role of Banking Sector



Population Growth



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Get out
and enjoy
it this
spring
with
the RSPB



We must halt the explosion in population to offer decent life for all, says Sir David Attenborough

By LIZ THOMAS

UPDATED: 02:22, 22 April 2011

Comments (70) Share +1 Tweet Like

Sir David Attenborough has warned that population growth must be stopped in order to offer a 'decent life' for all.

The wildlife broadcaster said people were shying away from accepting that the world's resources cannot sustain current levels of population growth.

'There cannot be more people on this Earth than can be fed,' he writes in the New Statesman.

'The sooner we stabilise our numbers, the sooner we stop running up the down escalator – and we have some chance of reaching the top; that is to say, a decent life for all.'

Sir David, 84, said the global population is over six billion and will hit nine billion in 30 years, but 'there seems to be some bizarre taboo around the subject'.

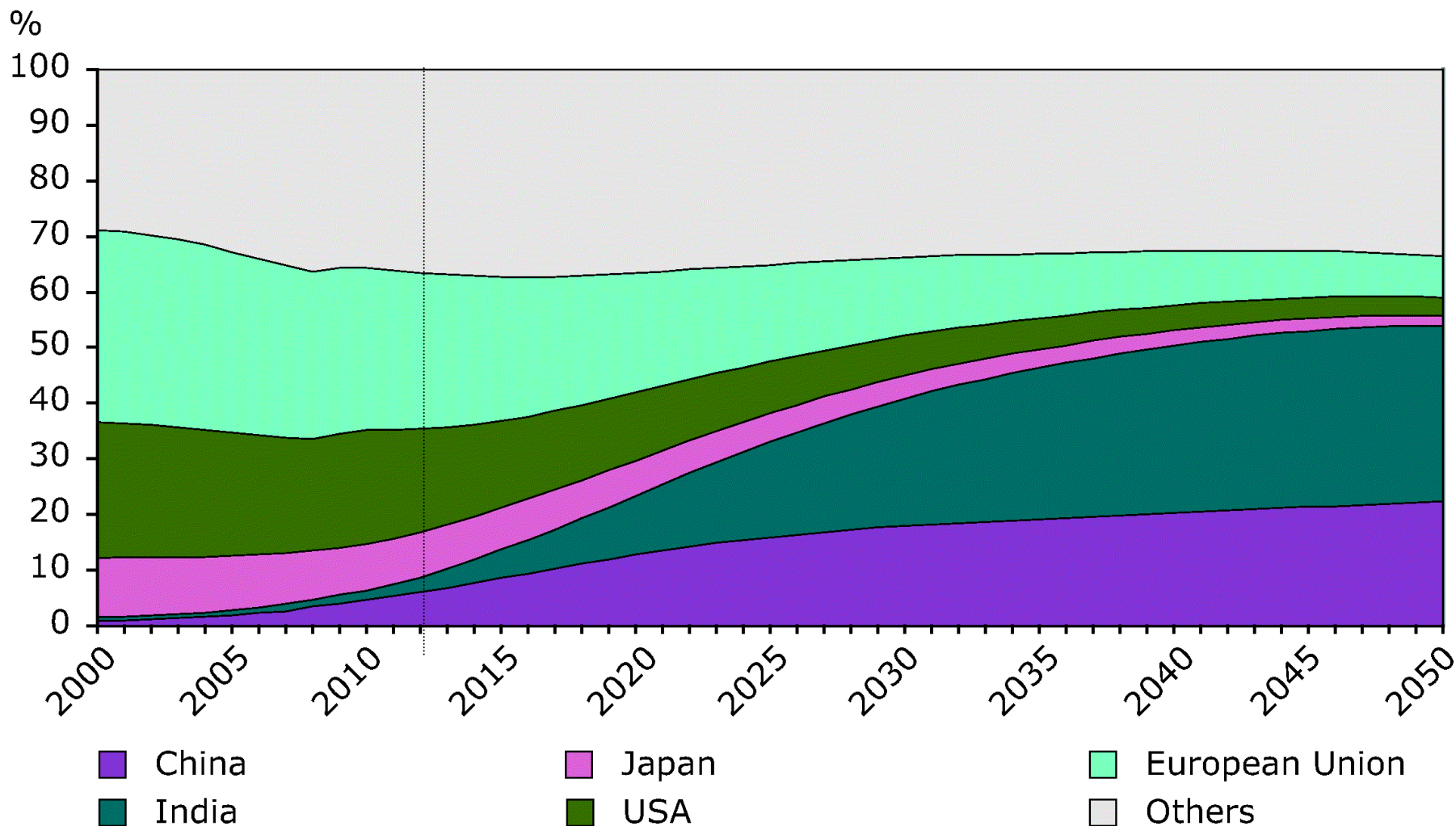
He warned of a 'perfect storm of population growth, climate change and peak oil production', leading to 'insecurity in the supply of food, water and energy'.



Warning: Sir David Attenborough encouraged population growth control

Experts have predicted that the British population - which is currently around 62million - will increase to 70million by 2029.

Projected shares of global middle-income class consumption, 2000 to 2050



<http://www.eea.europa.eu/data-and-maps/figures/projected-shares-of-global-middle>



“The most frequent and significant factor causing volatility is unpredictable weather conditions”.

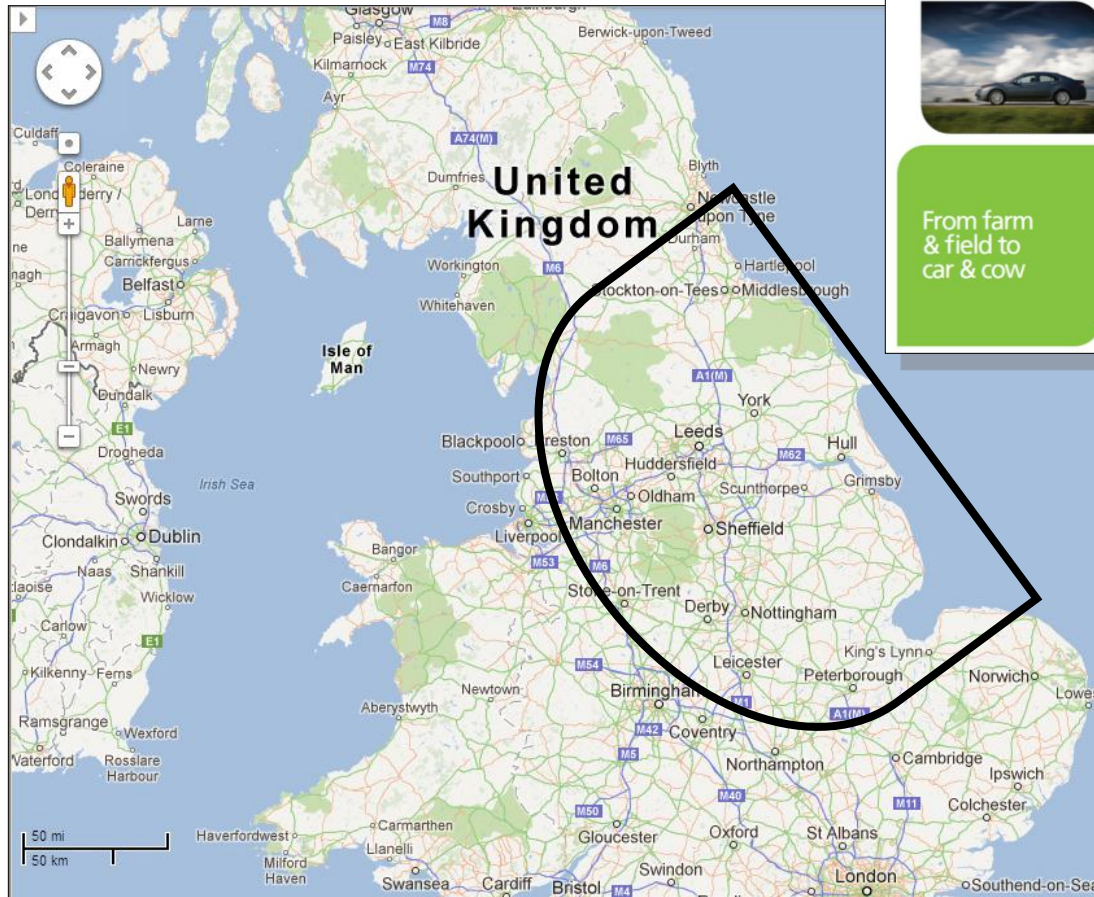
FAO/OECD Agricultural Outlook, 2011-2020



“By 2025, two-thirds of the world population could be living under water stress conditions”.

UN

“Our aim is to use UK-sourced wheat grown within a 100 mile radius of the plant.”



From farm
& field to
car & cow



Aerial image of Vivergo site - Mar 2012



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Global food commodity prices more than 35% higher than 2005-2010 average



<http://www.fao.org/worldfoodsituation/wfs-home/foodpricesindex/en/>



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England 20% Growth by 2020



Sustainable Growth in the Food and Drink Manufacturing Industry

Food and Drink
Federation **FDF**
Delivering Sustainable Growth

Grant Thornton

Grant Thornton report commissioned by the Food and Drink Federation



“ With the right entrepreneurial approach on the part of business and a genuine partnership between Government and industry, we believe that food and drink manufacturing can achieve 20% growth by 2020. A number of initiatives are already in place. Over the next few months we will build on this to maximise our sector’s ability to grow, and minimise the barriers that stand in our way. This is our 20/20 vision.”

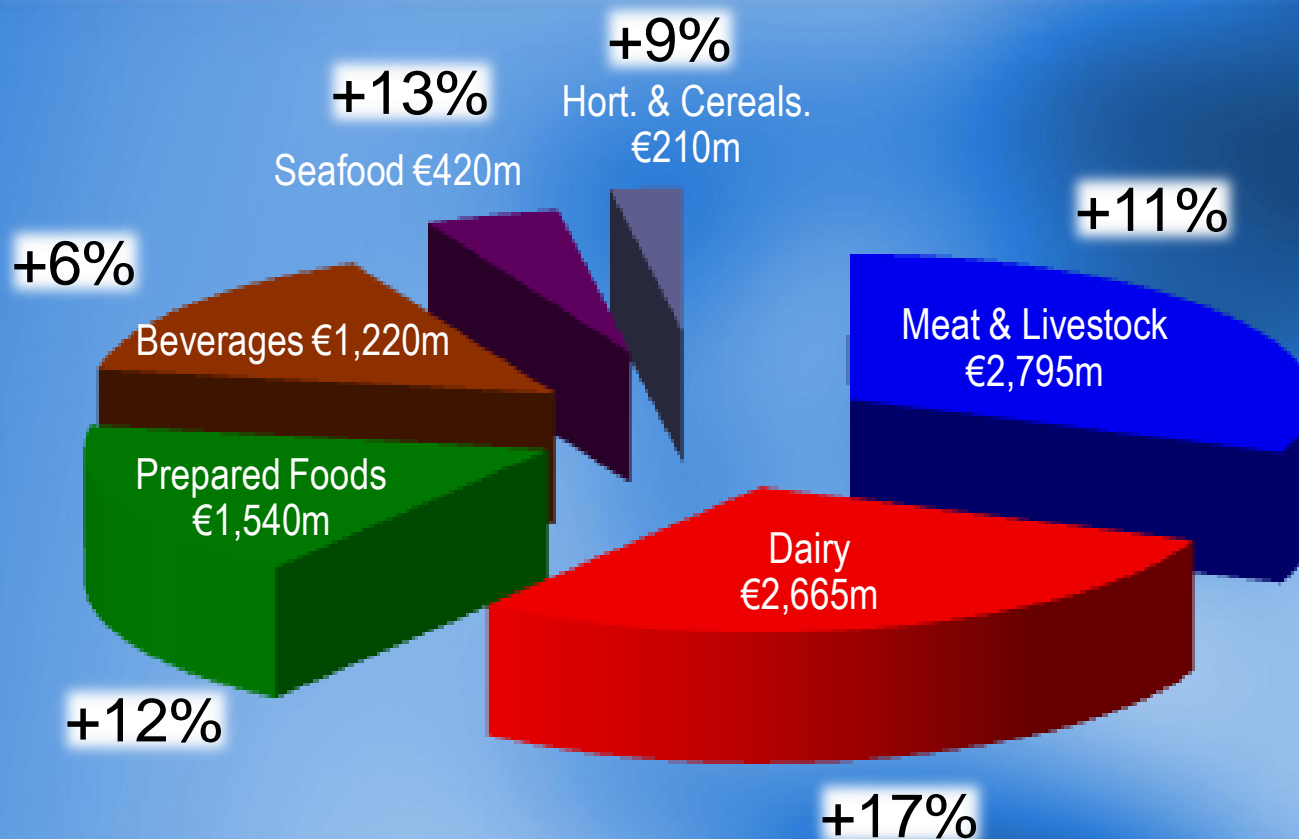
Jim Moseley, FDF President
Managing Director, General Mills UK Ltd

Ireland 40% Growth by 2020



- Increasing the value of primary output in the agriculture, fisheries and forestry sector by €1.5 billion. This represents a 33% increase compared to the 2007-2009 average.
- Increasing the value added in the agri-food, fisheries and wood products sector by €3 billion. This represents a 40% increase compared to 2008.
- Achieving an export target of €12 billion for the sector. This represents a 42% increase compared to the 2007-2009 average

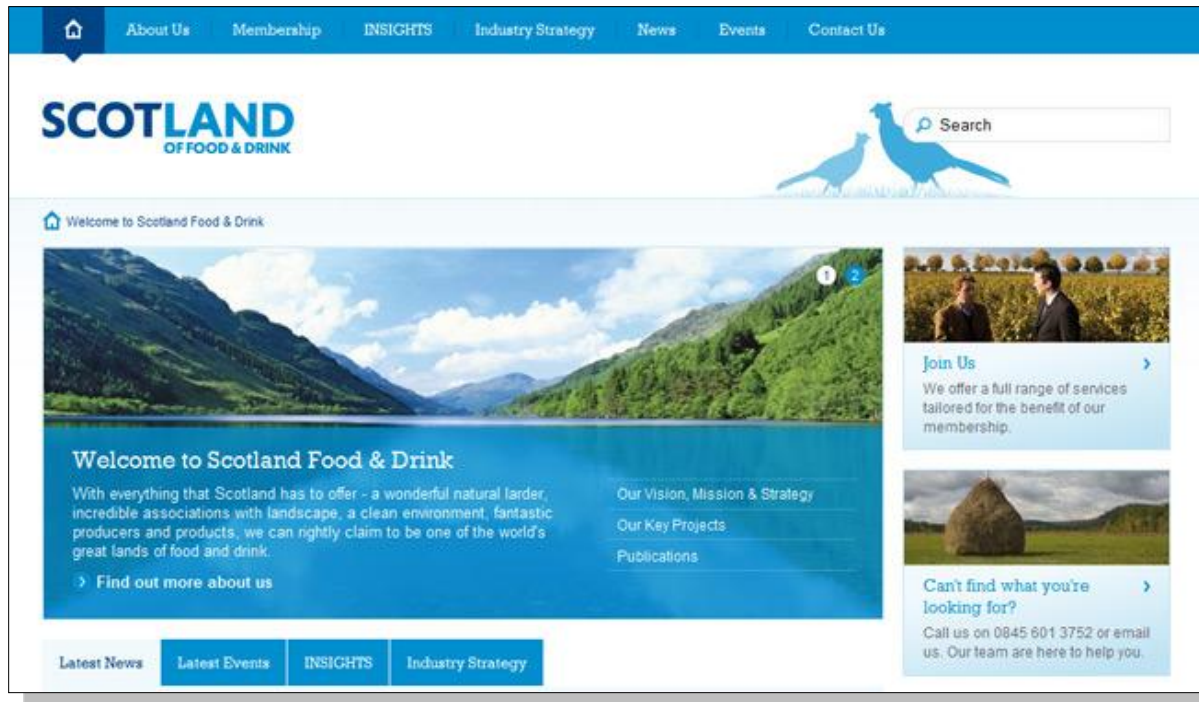
Exports up 12% in 2011....to €8.85bn



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Scotland 60% Growth by 2017



Our vision is to make Scotland internationally known as 'A Land of Food and Drink' and grow our industry from £10 billion to £12.5 billion by 2017. It's an ambitious goal but one that can be achieved if the industry works together, pools resources and knowledge and uses the Scotland Food & Drink brand to the best possible advantage.

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27 March 2012 Last updated at 10:48



Whisky growth pushes Scots food and drink exports to record high

A strong performance by the whisky industry helped push Scottish food and drink exports to an all-time high last year.

According to official figures, £5.4bn worth of food and drink products were exported in 2011, surpassing industry targets six years ahead of schedule.

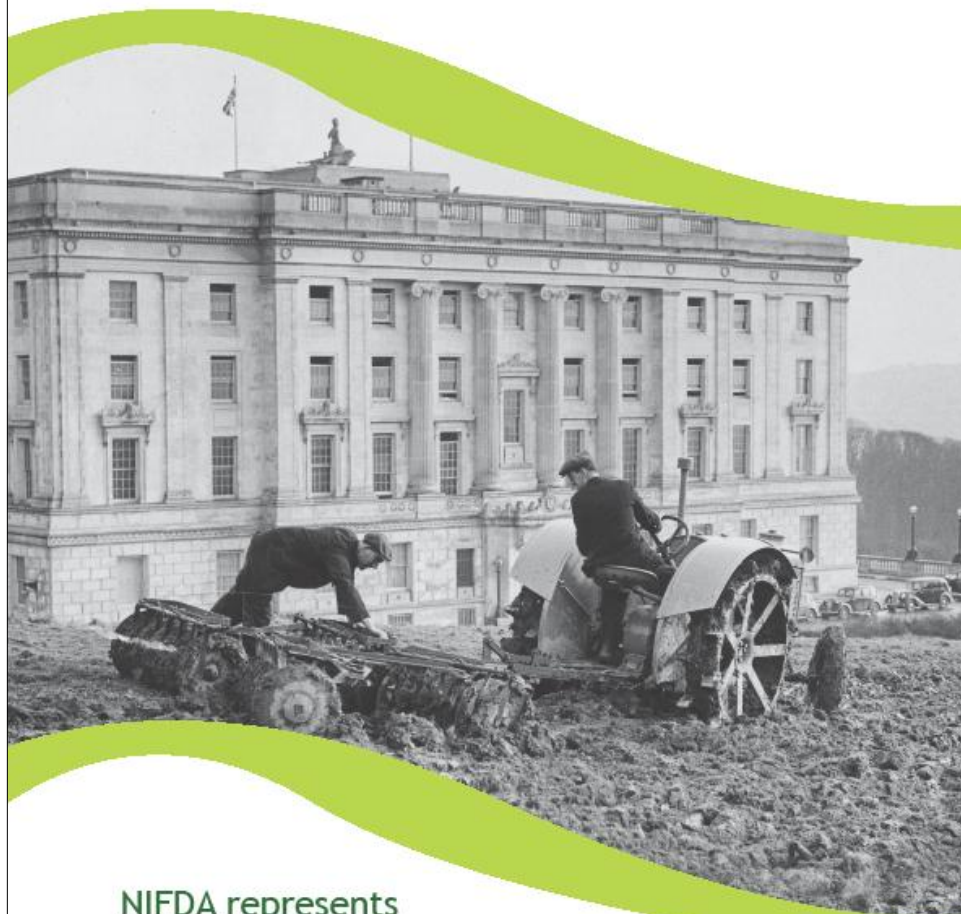
Whisky exports broke new records, increasing in value by 23% to £4.23bn.



Whisky exports reached record highs in 2011 rising to £4.23bn



Manifesto 2011



NIFDA represents
Northern Ireland's biggest
manufacturing industry

Value of Food & Drink Industry to Northern Ireland

October 2010

An economic
analysis prepared by
Goldblatt McGuigan
for Northern Ireland
Food & Drink Association



THE JOBS PLAN

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THE VOICE OF BUSINESS
NORTHERN IRELAND

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FEDERATION

Centre for
Competitiveness
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momentum
FOR NORTHERN IRELAND ICT FEDERATION

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NIIRTA
NORTHERN IRELAND INDEPENDENT
RETAIL TRADE ASSOCIATION

NORTHERN
IRELAND
FOOD & DRINK







NI's agri-food industry has an 'appetite for growth'

NORTHERN Ireland's Food & Drink industry can deliver more than half the new job targets set out in the Executive's Programme for Government.

However, speakers at the inaugural Northern Ireland Food and Drink Association (NIFDA) 'Appetite for Growth' conference stressed that joined up thinking throughout the supply chain and at policy making level is essential if the potential for growth in Northern Ireland's agri-food sector is to be fulfilled.

Speaking from the event, NIFDA executive director Michael Bell said: "The Northern Ireland food and drink industry has an 'appetite for growth' and we have been extremely encouraged by the discussions throughout the conference between all the stakeholders in the supply chain. It is essential we keep the momentum going and develop an action plan which addresses the issues outlined in NIFDA's 'Appetite for Growth' report, which was launched at the event. The report outlines the necessary strategic steps to facilitate and maintain the expansion of the agri-food sector in Northern Ireland. We have heard inspirational key note speeches from Aidan Cotter of Bord Bia and James Withers from Scotland Food and Drink, who drew from their experiences and current growth strategies. Namely Bord Bia's 'Food Harvest 2020' strategy which aims to grow its exports for food and drink by 40% by 2020 and the Scottish Executive's vision 'A Land of Food and Drink' which lays out a plan for achieving 60% food and drink output growth by 2017.

"In order for Northern Ireland's Food and Drink industry to increase output by 40% to £5.2 billion by 2020 and create thousands of new jobs, it is imperative that there is joined up thinking in the supply chain and it is of great importance that the agreed Programme for Government has made the agri-food sector priority one. We need to be passionate about what our industry can achieve and the contribution it can make to the local economy. We need to get out and tell people just how good we are and I believe we have taken the first step, at the 'Appetite for Growth' conference."

Addressing the conference, Enterprise Minister Arlene Foster said the new Agri-Food Strategy Board will have an important role in identifying actions to help expand food and drink sales abroad within the Northern Ireland Executive's overall Programme for Government commitment to develop exports as a key economic driver.

"With the world population growing rapidly and demand for Western products increasing steadily particularly in high



Tony O'Neill, Chairman, Agri Food Strategy Board, Minister for Enterprise, Trade and Investment Arlene Foster, Michael Bell, Executive Director, NIFDA and Minister for Agriculture and Rural Development Michelle O'Neill.

growth economies with developing and increasingly affluent middle classes, there are significant opportunities for Northern Ireland food companies to expand export sales.

"China, India, Russia and Brazil are all expected to be in the top five retail grocery markets by 2015, accounting for almost £2 billion. We cannot afford to ignore the business potential of these markets.

"Many local products from companies in sectors including dairy, beef, poultry and cereals are now being sold in global markets and have earned an impressive reputation for quality and innovation. I am convinced that the opportunities for existing exporters and other companies keen to expand sales abroad are very substantial.

"Food and drink, a £3.7 billion industry that's now our biggest manufacturer and has a track record of selling around 70 per cent of output beyond Northern Ireland, has immense potential and could become a locomotive that will drive our economic recovery and create thousands of new employment opportunities."

Agriculture and Rural Development Minister, Michelle O'Neill said that the opportunities and challenges faced by the agri-food sector make for a rewarding and innovative sector to work in and it is encouraging that the importance of food is now recognised in the wider context of our economy.

She added: "The Appetite for Growth Report raises a number of key issues for consideration within the agri-food sector across the north. Perhaps, most importantly, it highlights the tremendous potential across the sector for growth and job creation.

"I also believe that there are opportunities for enhanced growth in the sector, so long as everyone in the food chain, from farmer to processor, works together in partnership. That is why we are working with the industry to establish an industry-led Agri-Food Strategy Board to develop a strategic plan for the sector to 2020.

"This report, along with the discussions that have been held here today, will no doubt provide food for thought for the new Agri-Food Strategy Board in taking forward this important work."

The innovative event which was sponsored by Invest NI, Ulster Bank, PwC and Morrow Communications brought together Ministers for Enterprise, Trade and Investment and Agriculture and Rural Development, Arlene Foster and Michelle O'Neill as well as the recently appointed Chair of the Agri Food Strategy Board, Tony O'Neill, who addressed over 150 delegates from both the business and agri-food sectors across Northern Ireland.

For more information please visit www.nifda.co.uk.



NORTHERN IRELAND FARM TOY & MODEL SHOW

6th & 7th APRIL 2011

**OPEN : FRI. 2pm - 10pm
SAT: 10am - 4pm**

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**NORTHERN
IRELAND
FOOD & DRINK**

Business soapbox

Michael Bell



THIS WEEK WE ASK AN EXPERT TO TAKE A LOOK AT ER....

“With partnership from the Executive regarding sustainability, planning, investment and skills, I believe we can accelerate the growth of our industry

The good news ... the data taken from the latest Size and Performance of the Northern Ireland Food and Drink Processing Industry report published by the Department of Agriculture and Rural Development, shows that through the recession to date, the food and drink industry's turnover is £3.68bn, which is a remarkable 8.4% growth year on year (2009/2010).

Indeed industry growth from 2008 shows a £554m turnover representing 18% growth.

The Northern Ireland Food and Drink industry supports upwards of 90,000 jobs locally including employment in areas including farming, haulage, hygiene, cold stores, packaging and engineering.

The even better news ... the figures are very encouraging in the face of recession, but there is reason to believe we can do better!

The UK trade deficit in food is currently £18.4bn and represents a huge opportunity.

And it's a win-win scenario;

addressing the trade deficit in food and drink could have multiple positive impacts on the UK economy beyond the broad call for reducing imports.

In October 2010 NIFDA published a document that showed that up to 15,000 jobs

to the programme for government must not be missed and by continuing to work together we will endeavour to create new jobs for our young people.

Food prices are rising and will continue to rise for the foreseeable future.

The forces driving this are global. Population growth combined with a finite amount of land available will inevitably mean that food and drink will rise in value.

Overall, we see a very bright future for the food and drink industry.

With partnership from the Executive regarding sustainability, planning, investment and skills; I believe that we can accelerate the growth of our industry.

For NIFDA and its members, I believe the future is tasty.

Michael Bell, is executive director of the Northern Ireland Food and Drink Association (NIFDA)

“Population growth combined with a finite amount of land available will mean that food and drink will rise in value

could be created simply by growing the industry akin to our nearest competitors.

So far, I have been greatly encouraged by the responses' of the Deti and Dard ministers.

The importance of agri-food

Spread bet group in trade boom

NEWS

BY PHILIP WHITEROW

SPREAD bet firm IG Group has seen record levels of activity in the past few weeks as stock markets, shares and commodities have swung wildly.

The group, whose customers bet on which way markets, share prices and commodity prices will move, said the trading boom was despite it being the holiday season in most countries where it operates.

The frenetic trading has sent revenues in excess of £94m for the quarter ending August, 19% higher than the £79.1m generated in the same period a year ago.

The market roller coaster over the past month has been driven by fear over the impact of the eurozone debt crisis and the possibility of the US economy grinding to a halt.

Commodity prices have also been very active, also good news for IG and other spread bet firms.

WE CAN HELP



- Who are we
- What are our Market opportunities
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HEADLINE FIGURES

- **Agriculture**

- Gross output (2010) £1.5 billion
- Gross value added (2010) £378 million

- **Food and Drinks Processing**

- Gross output (2010) £3.7 billion
- Gross value added (2009) £608 million

- **Combined Contribution to Northern Ireland**

- GVA 3½%
- Employment 6%



Department of
**Agriculture and
Rural Development**

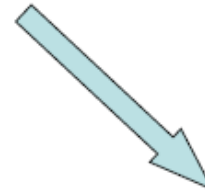
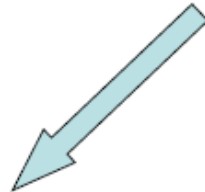
www.dardni.gov.uk

AN ROINN
Talmhaíochta agus
Forbartha Tuaithe

MAINNSTRIC O
Fairms an
Kintra Fordèrin

Food and Drinks Processing Sector Multipliers

**+£1m in food and drinks
processing output**



**+£1.91m in regional
economy output**

**+£0.54m in regional
economy GVA**

**+22 FTE jobs in the
regional economy**

**+ 1 job in food and drinks
processing**



**+ 1.91 jobs elsewhere in
the regional economy**

Source: Agri-Food & Biosciences Institute



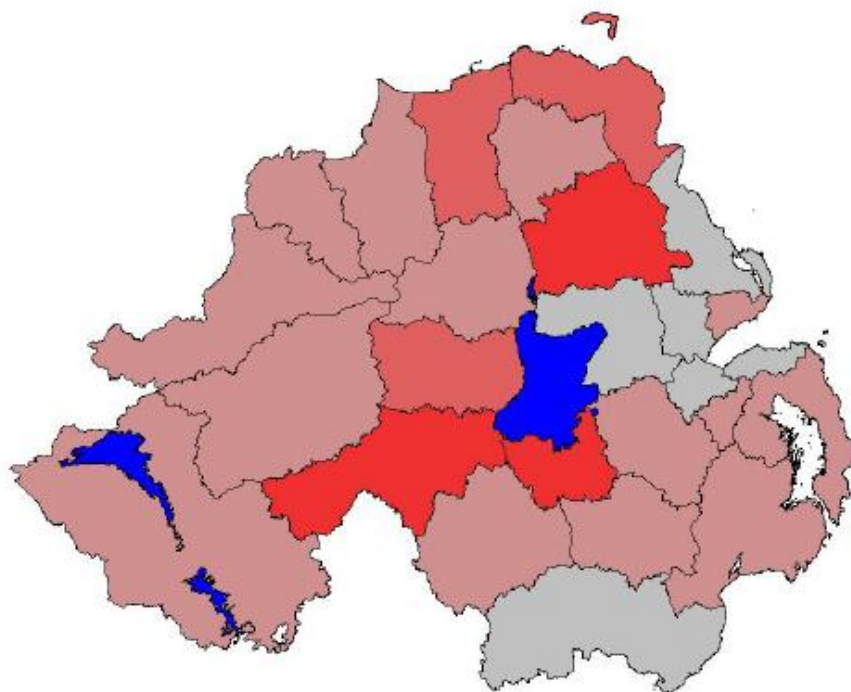
Department of
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
AN tOEN
Talmhaíochta agus
Forbartha Tuaithe

MAINNISTRE O
Fairms an
Kintra Fòrdèrin

Contribution to Sub-Regional Employment



Estimate of food and drinks processing employment as percentage of total private sector employment in each Council area

	10% to 15%
	5% to 10%
	1% to 5%
	0 to 1%

Growth of the 'big four' supermarkets

Number of supermarket stores

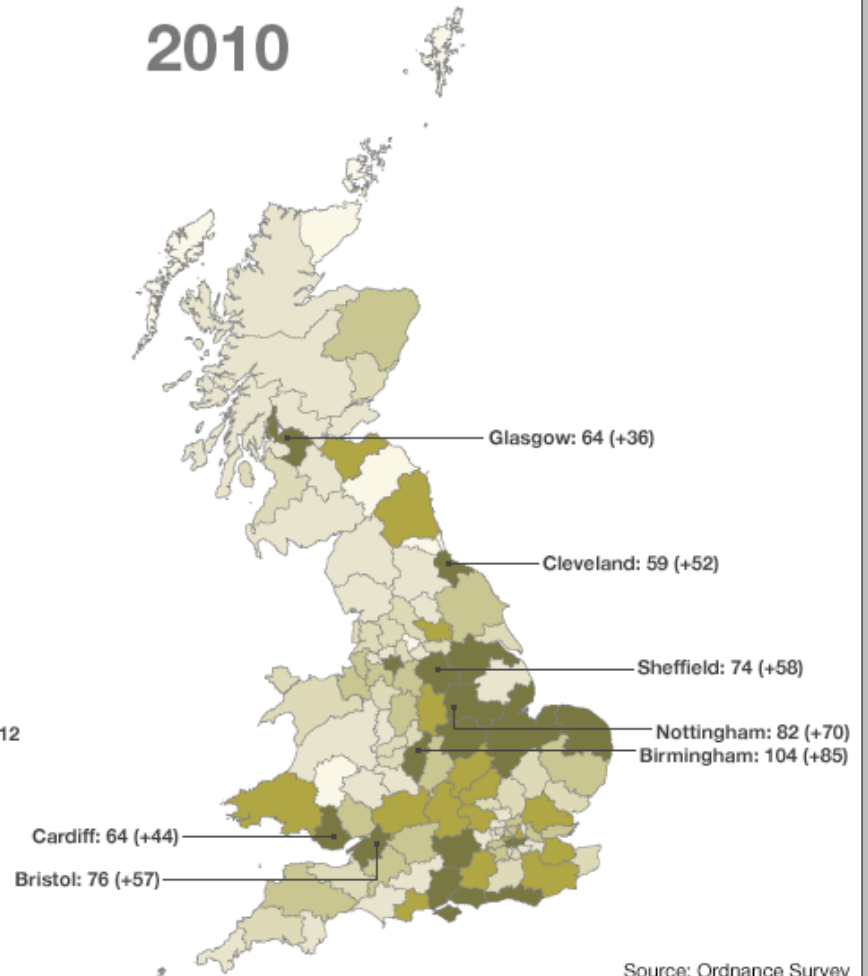
The 'big four' by postcode

- 0 - 10
- 11 - 20
- 21 - 30
- 31 - 40
- 41 - 50
- 50 +

2004



2010



Source: Ordnance Survey

<http://www.bbc.co.uk/news/uk-12007835>

MINISTERS PUSH FOR AGRI-FOOD STRATEGY BOARD MEMBERS

People were today reminded that they have just a few days left to submit applications to become a member of the new Agri-Food Strategy Board.

~ Thursday, 15 March 2012

The Board will be made of up both industry and senior Government officials and its purpose is to develop a strategic plan for the agri-food sector up to 2020. The search for Board Members follows the recent appointment of Tony O'Neill as the new independent Chairperson of the Agri-food Strategy Board.

The closing date for applications for Board Members is noon on Tuesday 20th March 2012.

Encouraging people to apply the Enterprise, Trade and Investment Minister Arlene Foster and Agriculture and Rural Development Minister Michelle O'Neill said: "Developing a strategic plan for the agri-food sector is included in the Executive's Programme for Government and the potential of the sector is clearly recognised in the Executive's Economic Strategy. There is a significant job to be done in helping to realise the enormous opportunities available to this important sector."

The Ministers continued: "We are now reaching the final stages of setting up the Board which will take forward this important piece of work. We have always said this is to be an industry led process and we need the best people in the industry to put themselves forward for consideration. The Board needs to be made up of committed individuals with the skills, attitudes and new ideas to drive this work and the sector forward. This is very much an opportunity for industry to have its say and to determine its growth ambitions over the longer-term and we are encouraging those who want to be part of that future to apply."

Application packs are available from the Invest NI and DARD websites at the following links.

15 March 2012 - Minis...

Agri-Food Strategy Board (AFSB)



Enterprise Minister Arlene Foster (right) and Agriculture Minister Michelle O'Neill (left) are pictured with Mr Tony O'Neill, who was recently appointed to the position of chair to the Agri-Food Strategy Board.

Big hopes on agri-food to grow the economy

JAMES CAMPBELL
NORTHERN EDITOR

Tremendous hopes are being built up around the Food Strategy Board for Northern Ireland and the perceived capacity for the agri-food industry to lift the local economy.

There is no doubt that farmers in Northern Ireland can produce more if they are given the incentives to do so — in particular, higher prices. But those are out of control of the Food Strategy Board or anyone else.

The focus of the board will presumably be on every other conceivable opportunity to boost the output from the sector. One of the immediate boosts is in the amount of discussion time being devoted to the matter.

'APPETITE FOR GROWTH'
'Appetite for Growth' is the theme for the Northern Ireland Food and Drink Association (NIFDA) conference to take place in Belfast on 22

March. The event, which is sponsored by Invest NI, Ulster Bank, PwC and Morrow Communications, will look at how the local food and drink industry can contribute to the growth targets set out for the NI economy in the Executive's Programme for Government.

It will also discuss the potential offered by the formation of the new Agri-food Strategy Board, which is a joint initiative by the Department of Enterprise, Trade and Investment and the Department of Agriculture and Rural Development.

The aim of the conference is to provide a platform to discuss how the potential for growth in Northern Ireland's agri-food sector can be fulfilled.

It will highlight the ambitious growth targets that both the Scottish and Irish Governments have set for their food and drink industries, representing 60% and 40% respectively.

The conference will bring together six expert speakers from across the UK and Republic of Ireland, including Aidan Cotter, chief executive of the Irish food board, Bord Bia, and James Withers, chief executive of Scotland Food & Drink.

The food sector provides around 20% of NI's private sector employment and generates an output worth £3.5bn.

CONFIDENT

NIFDA's Michael Bell said that the association is confident the industry can contribute to achieving the Northern Ireland Executive's economic growth targets.

"We believe the Northern Ireland food and drink industry has the capacity to increase output by 40% to £5.6bn by 2020 and in the process generate up to 15,000 new jobs, if the correct actions are taken to facilitate and maintain this expansion.

"In order to ensure North-

ern Ireland achieves its potential we need to formulate an action plan to maximise this opportunity. We believe the formation of the Agri-Food Strategy Board will deliver a central focus, providing momentum to ensure that Northern Ireland meets these targets.

"The 'Appetite for Growth' conference provides a very timely opportunity for the industry to air their views on how this can be achieved and will be extremely beneficial for those local businesses that are focused on expansion and growth."

The event will include interactive workshops alongside keynote speeches.

'Appetite for Growth' will take place in the King's Hall Conference Centre from 9.30am to 3.30pm on 22 March. To register, visit www.nifda.co.uk or contact Morrow Communications on 02890 393837 or email events@morrowcommunications.com

Deloitte.

Food and Beverage 2020 Northern Ireland



21 March 2012

Key findings – Northern Ireland

Specific Northern Ireland challenges:

Impact of the Food Strategy Board:

Contributors have expressed reservations with regard to the impact which the Food Strategy Board (FSB) will have in promoting growth and job creation (17% = no impact and 45% = unsure). Many companies also expressed the view that there can be greater merit in aligning with GB affiliations or lobbying Westminster politicians directly for change rather than looking to local policy makers.

Focus areas include:

► Execution:

The advisory nature of the FSB with consequent financial constraints inevitably means that initiatives are likely to be progressed only at the request of the two executive departments (DARD & DETI) which the industry considers to be difficult to manage and lacking in the entrepreneurial vision to drive growth and job creation.

► Increase competencies:

Whilst ultimately it will be market forces that will dictate strategy, growth and job creation, the industry's ability to react quickly to opportunities must see efficiencies in areas such as the planning and environmental agencies.

62% unsure or no impact:- AFSB

► **Better consultation:**

If the FSB can influence policy there must be an appropriate balance of input from producers and processors and key areas for strategic focus will be: marketing, talent development, the consolidation of the industry in order to compete on a global scale, and approaches to tackling energy and transport cost disadvantages.

► **Guidance:**

In addition, and importantly, the industry is looking to FSB to provide guidance, facilitation and active support in achieving export led growth (in terms of added value).

Promotion of food in Ireland:

- There is an appreciation that the marketing activities of Bord Bia have been successful in the effective promotion of food in Ireland. Protectionist policies aside there is support, where appropriate, for mutual exploitation of the Irish brand where not in direct competition.

NIFDA members want the AFSB to provide....export led growth





- Who are we
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- Role of Banking Sector**



What do we want from the banking sector?

- Access to investment capital
 - Reasonable access criteria
 - Reasonable quantity availability
 - Reasonable costs
- Value Agri-Food - banks should be applauded for correctly valuing Agri-food. (Government is catching up)
- Extend time frames. Return to long term planning.
- Maintain and develop further close working relationship and understanding.



Thank you

Northern Ireland Assembly Business Trust

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