



Working  
with nature

**Michael Maloney**  
***Director of Origin Green***



Growing the success of Irish food & horticulture

***Bord Bia***  
Irish Food Board

# Our Mission

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

Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board





Department of  
**Agriculture,  
Food and the Marine**  
An Boinn  
**Talmhaíochta,  
Bia agus Mara**

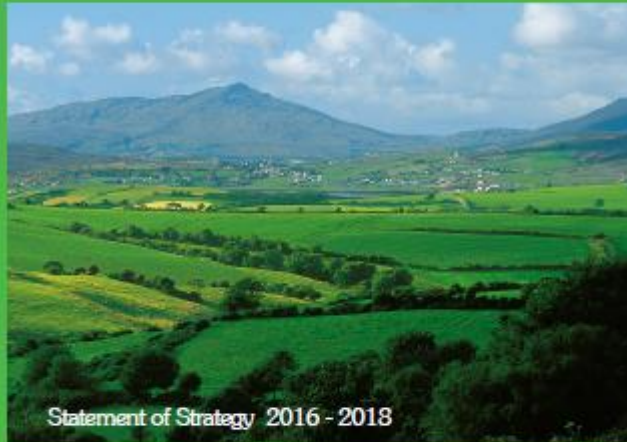
LOCAL ROOTS GLOBAL REACH  
**Food Wise 2025**  
A 10-year vision for the Irish agri-food industry

Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board



# Making a World of Difference



Statement of Strategy 2016 - 2018

Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board

- Informed by consumer insight
- Enabled by valued people, talent & infrastructure
- **Underpinned by Origin Green**
- Realised by effective RTM
- Supported by strong brand communications in a digital age

**Bord Bia**  
Irish Food Board





# Sustainability Trade Research Study

November 2009







Bord Bia's Programme to  
provide proof that  
Ireland's food & drink is  
being produced  
sustainably

- National sustainability programme uniting government, private sector & food producers
- Structure to collate facts and figures
- Business to business initiative
- Help our customers achieve their targets
- Build relationships



# Origin Green – A Full Supply Chain Programme



Growing the success of Irish food & horticulture



Working  
with nature

# Farm Level

Growing the success of Irish food & horticulture

*Bord Bia*  
Irish Food Board





The farm audit



Growing the success of Irish food & horticulture



# Beef and Lamb Quality Assurance Scheme Producer Standard Revision 01



Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board

## Sustainable Beef & Lamb Assurance Scheme



Working  
with nature

**Bord Bia**  
Irish Food Board



# Using Data to Drive Performance

GHG  
Emissions



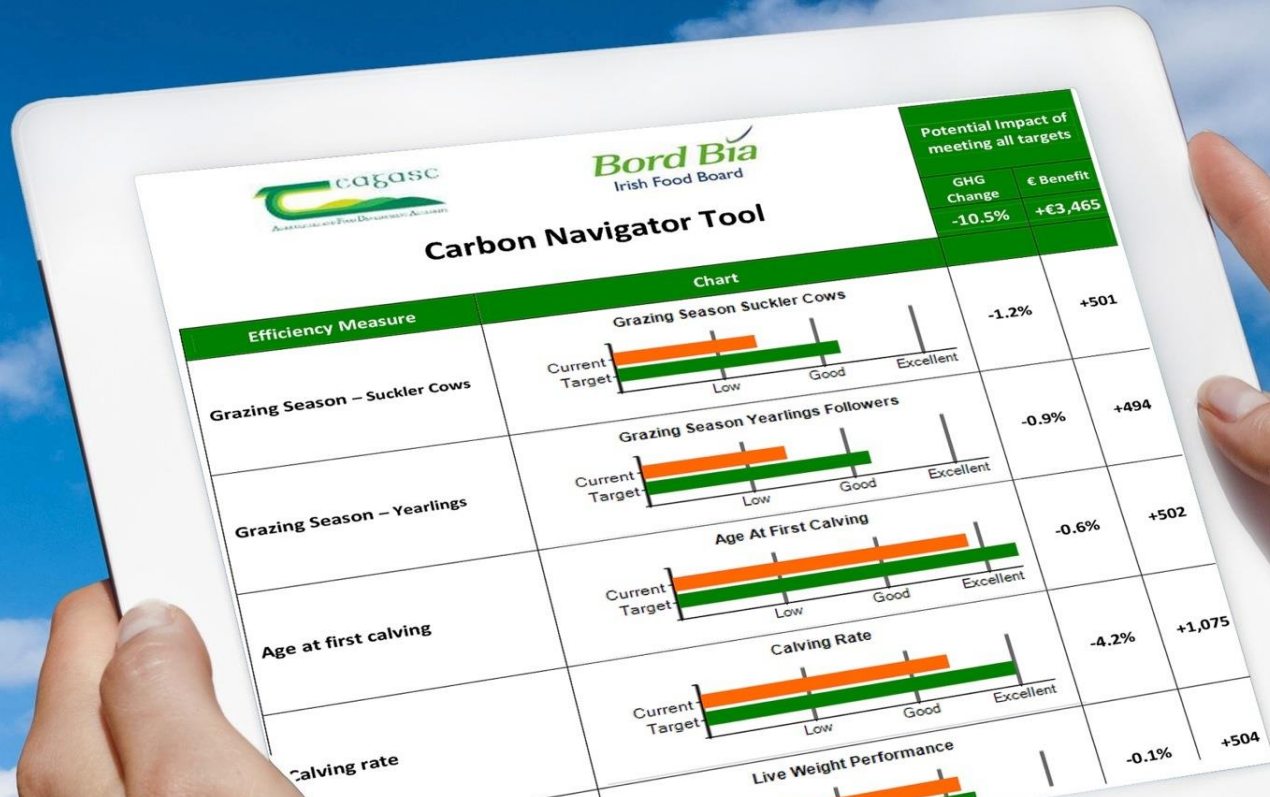
Farm  
Financial  
Performance



Sustainable = Efficient



# The Carbon Navigator





# Extended Grazing Season

**10 Day Increase in  
Grazing Season**

**Reduces costs by €25 per cow**

**Cuts carbon footprint by 1.7%**

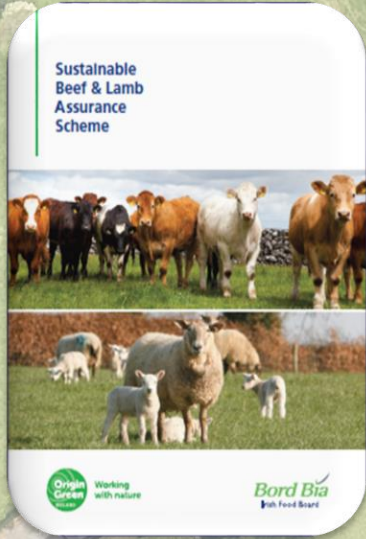


Accreditation, independent verification...

ISO  
17065



# Farm Sustainability Schemes



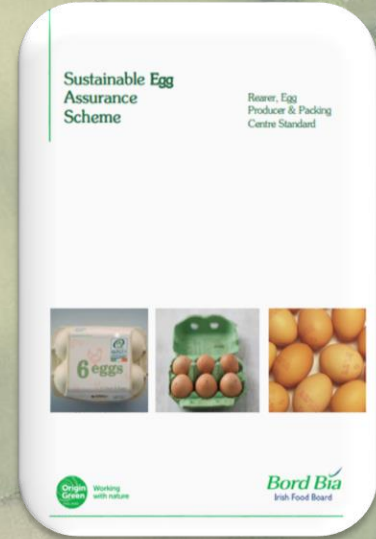
Beef & Lamb



Dairy



Horticulture



Eggs



# Farm Quality & Sustainability Audits



**51,600 Beef Farms**

**90% of Beef Exports, Audited & Carbon Footprinted**



**18,000 Dairy Farms**

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



**Pigmeat, Poultry, Lamb, Eggs, Horticulture**

**Sustainability measures being implemented**

***Over 180,000 carbon assessments on farms to date***

Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board



# Manufacturing Food & Drink Companies





# Origin Green Sustainability Charter



Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board

# ORIGIN GREEN TARGET AREAS

## RAW MATERIAL SOURCING

1 target

- ▣ Suppliers Certification
- ▣ Sustainability Initiatives
- ▣ Packaging



## MANUFACTURING

3 targets

- ☒ Water
- ▣ Emissions
- ☒ Waste
- ☒ Energy
- ▣ Biodiversity



## SOCIAL SUSTAINABILITY

2 targets

- ☒ Employee wellbeing
- ▣ Community engagement
- ▣ Health & Nutrition





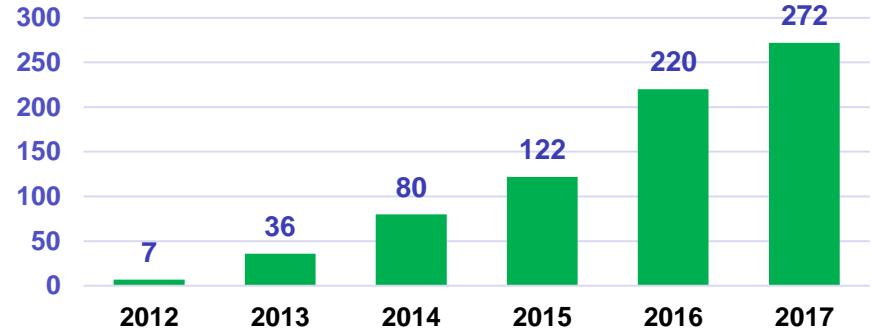
# Origin Green Verified Members

**589 Companies Registered**  
*95% of exports*

**243 companies at workshop/  
plan development phase**

**346 verified companies**  
*Over 90% of exports*

**Verified Members**

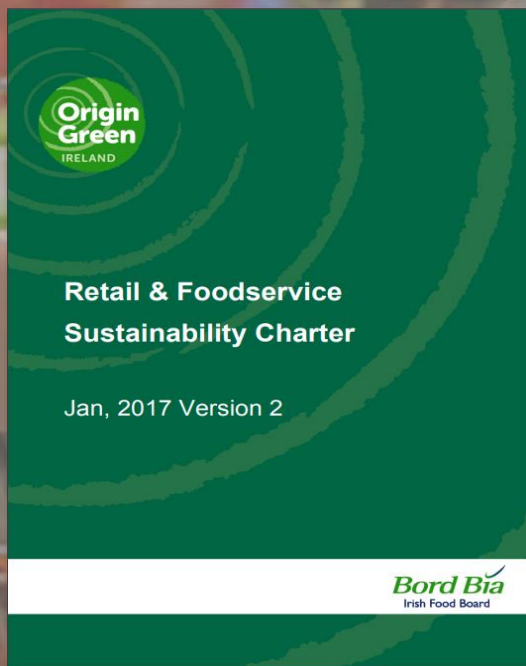






# Retail & Foodservice





**Sustainable Sourcing**

**Operations**

**Health & Nutrition**

**Social Sustainability**

- Pilot Launched 2016
- Nine Verified Members to Date



Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board



# Origin Green and the United Nation's Sustainable Development Goals



## Origin Green Alignment with the UN Sustainable Development Goals



Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board

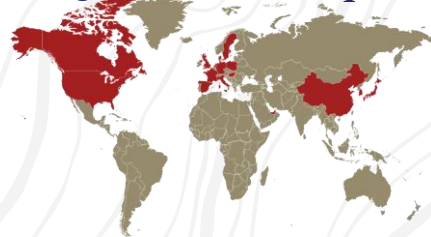
# Our Global Sustainability Survey

**Objective:** To understand customer and consumer awareness, attitudes and purchasing behaviour around sustainability.

## *Customer insights*

- Interviews with senior procurement and sustainability professionals
- Representative of key retailers, manufacturers and food service providers in each market

### *13 markets in scope*



Canada  
China  
France  
Germany  
Italy  
Japan  
Republic of Korea  
Netherlands  
Poland  
Saudi Arabia  
Sweden  
United Kingdom  
United States

## *Consumer insights*

- Online survey completed by over 8,500 consumers
- Surveys translated into local languages, as required
  - Demographic representation of each market



***PwC Research administered an online global survey to understand current thinking around sustainability, looking at consumer attitudes, behaviours and preferences in relation to the language of sustainability, sustainable food products, lifestyles and practices.***

***Voice of 8,628 consumers globally, covering 13 countries***

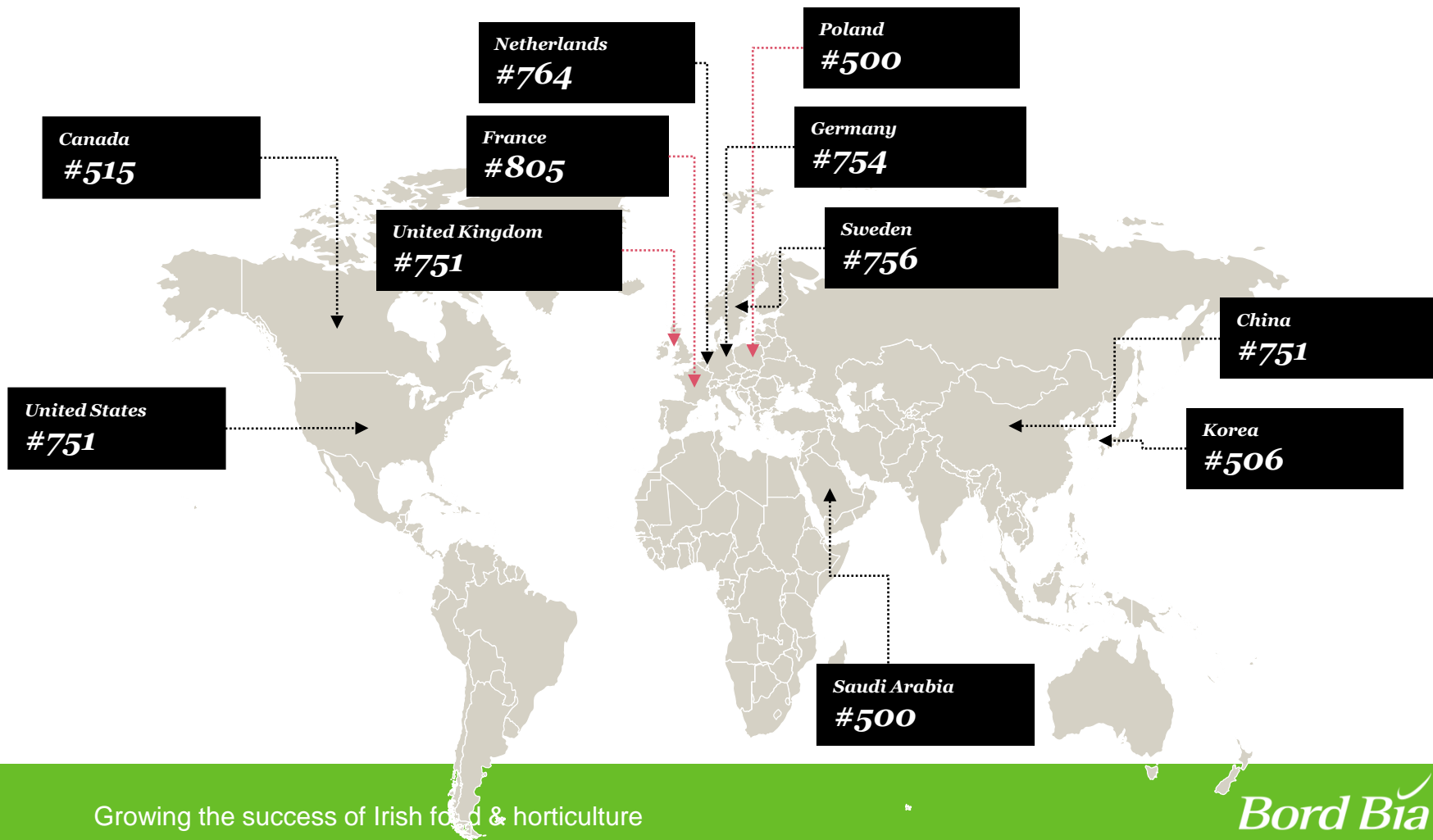


***Survey available in 11 languages***



***Working closely with an online panel to ensure survey respondents in each country are nationally representative for the following demographics: age; gender; employment status; and region.***





Growing the success of Irish food & horticulture



## European retailers

METRO

Sligro

ALDI

Carrefour

LIDL

Intermarché

coop

Gruppo  
PAM

FRISCHE PARADIES

zabka

TESCO

ICA

Ahold  
Delhaize

Sainsbury's

MARKS &  
SPENCER

ASDA

SELFRIDGES & CO

ocado

## North American retailers

SPROUTS  
FARMERS MARKET

Walmart

WHOLE  
FOODS  
MARKET

save on foods

Sobeys

DEAN & DELUCA

metro

## Fast food chains

KFC

FIVE GUYS  
BURGERS and FRIES

McDonald's

dunkin'  
brands

Yum!

itsu

Pizza  
Hut

## Multinational FMCG companies

General  
Mills

Pernod Ricard

Unilever

Nestlé

## Food manufacturers

marineharvest

Arla

Ornua  
THE HOME OF IRISH DAIRY

greencore  
group

Dairy  
Farm

ARASCO

CONAGRA  
BRANDS

Hochland

## Asian / Saudi retailers

FamilyMart

citysuper

amazon.co.jp

春播  
CHUNBO

emart

Pando  
Panda Retail Company

## Corporate food services

eliorgroup  
Time savored

Vion

aramark

Bidfood

sodexo

Growing the success of Irish food & horticulture

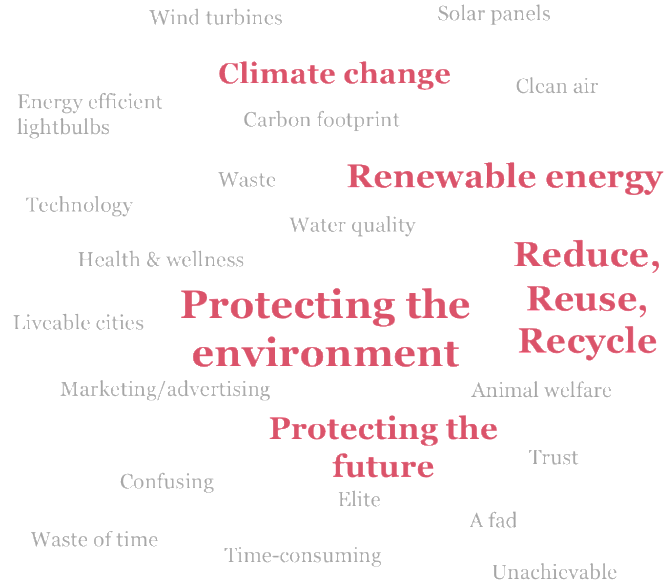
**Bord Bia**  
Irish Food Board

# The Headlines

- 1. Sustainability & Food Sustainability Mean Different Things**
- 2. Trade buyers lead in West, Consumers lead in the Rest**
- 3. Transparency Of Information Is A Strength For Ireland**
- 4. Our Grass Fed Story Is Motivating To Customers**
- 5. Trade buyers & Consumers Value Our Carbon Footprinting**



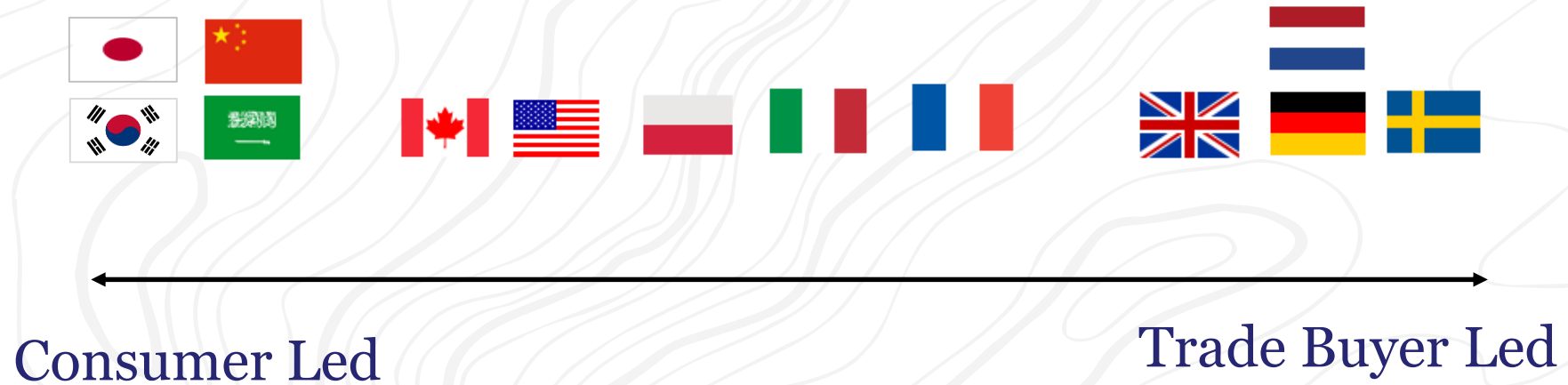
# When you hear the term **sustainability...**



# When you hear the term **food sustainability...**



# Who drives the food sustainability conversation?





# Who are our target trade buyers?

Our ***sustainability maturity framework*** maps the level of adoption and integration of sustainability within an organisation's overall sourcing strategy. An organisation's position on this framework can influence how Origin Green can be tailored to resonate with the sustainability and sourcing priorities of the organisation.

## ***Sustainability laggards***

*Environmental or social impact not a consideration in sourcing decisions*

## ***Sustainability followers***














*Reactive to NGO, consumer pressure, and competitor trends to source sustainably*

## ***Sustainability leaders***

*As a core value of the organisation, sustainability is integrated in all corporate decision making*

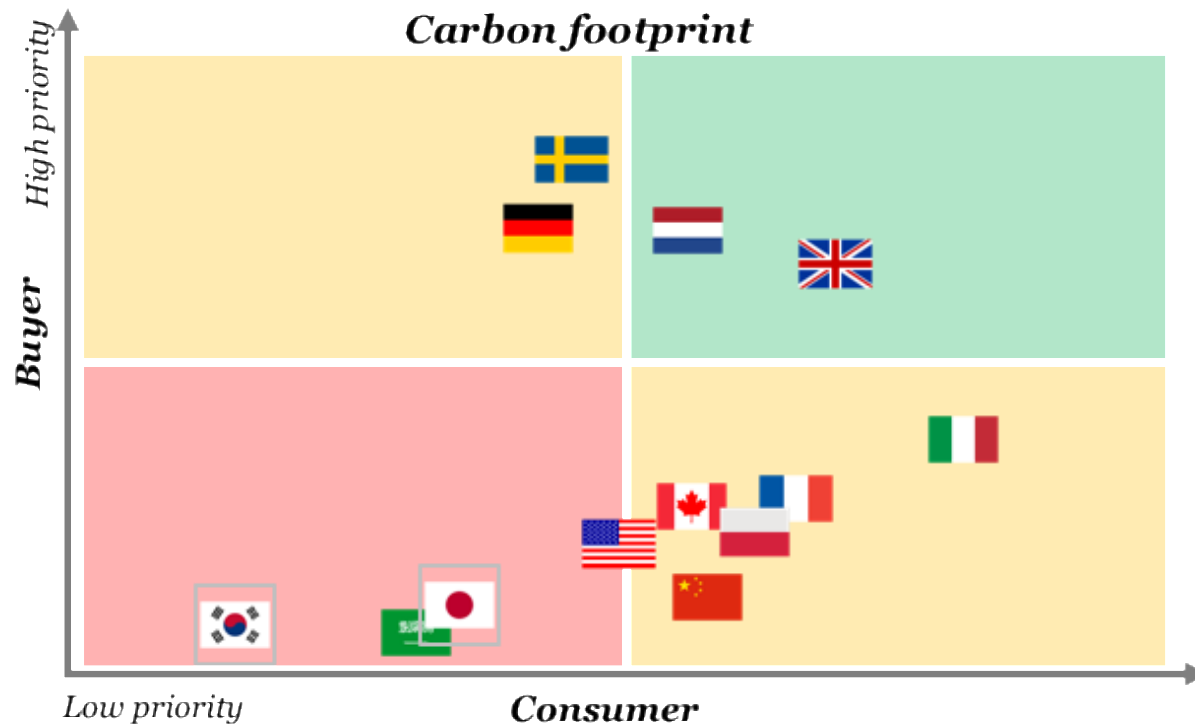
High maturity

# European trade buyers are demanding more transparency

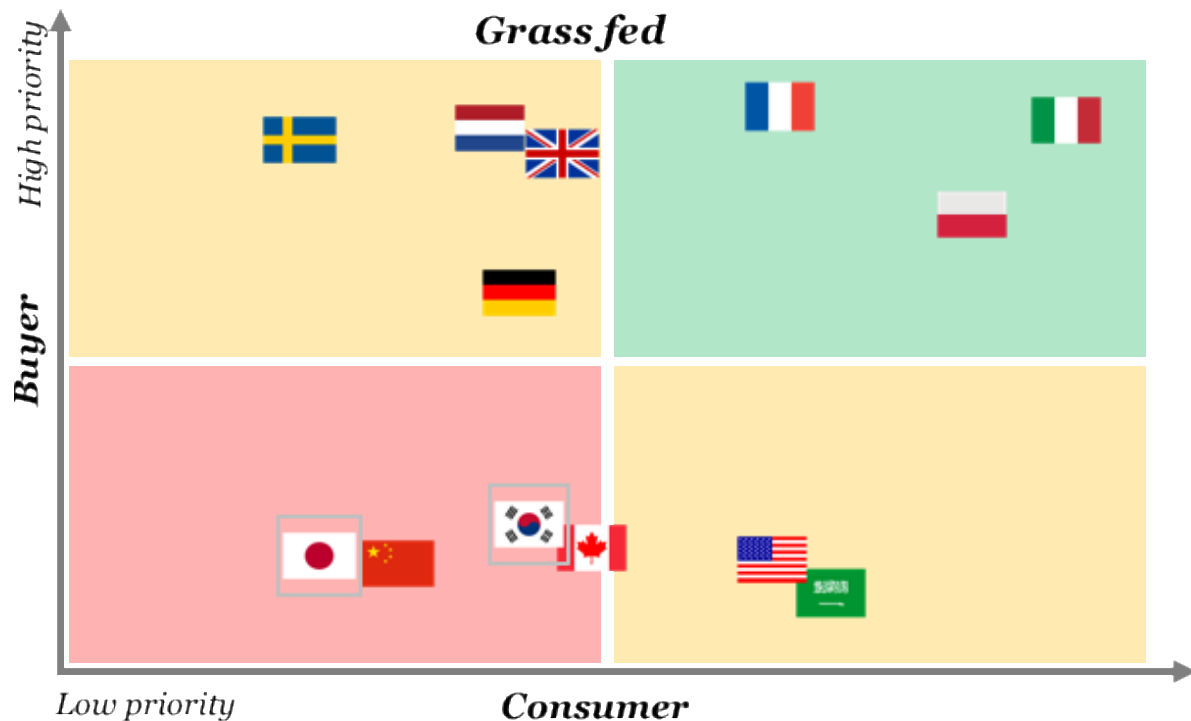
	Asia & Middle East	North America	Europe
	   	 	      
Transparency of information	<div>Product origin</div> <div>Animal welfare</div> <div>Healthy</div> <div>Carbon footprint</div>	<div>✓</div> <div>✓</div> <div>✓</div> <div>✓</div>	<div>✓</div> <div>✓</div> <div>✓</div> <div>✓</div>
Animal feed	<div>Government endorsement</div>		
	<div>✓ (not in Japan)</div>		
	<div>Grass fed</div> <div>GMO free</div> <div>Hormone free</div> <div>Organic</div>	<div>✓</div>	<div>✓</div> <div>✓</div> <div>✓</div> <div>✓</div>
	<div>Animal welfare standards</div>		<div>✓</div>
	<div>Certification</div>		<div>✓</div>
	<div>✓ (halal)</div>		



# Trade Buyer & Consumers value Carbon Footprinting



# The Grass-Fed Conversation Has Moved Mainstream





## ***Our global sustainability focuses Origin Green:***

- Differing attitudes to food sustainability in different markets
- Ever more transparency of information among sustainability leaders
- Development of trade buyer and consumer focused strategies
- The emergence of Grass-Fed as part of the conversation
- And the changing conversation around health and sustainability



Working  
with nature

# A World Leader in Sustainability

Everyone on the journey...

Measuring what matters...

International Standards...

Continuous Improvement...

Growing the success of Irish food & horticulture

*Bord Bia*  
Irish Food Board





# Thank You

Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board



# Collaboration



CARBON TRUST

SGS

SAI  
PLATFORM

dsf  
Dairy Sustainability Framework

GLOBAL ROUNDTABLE FOR SUSTAINABLE BEEF



Growing the success of Irish food & horticulture

*Bord Bia*  
Irish Food Board

# Origin Green Ambassadors



Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board



The world's first national  
food sustainability programme



# There are 6 Food Sustainability Priorities for Leaders



1 ANIMAL  
FEED



2 ANIMAL  
WELFARE



3 CONTINUOUS  
IMPROVEMENT



4 INNOVATION AND  
TECHNOLOGY



5 WORKING IN  
PARTNERSHIP



6 OPERATIONAL  
EFFECTIVENESS