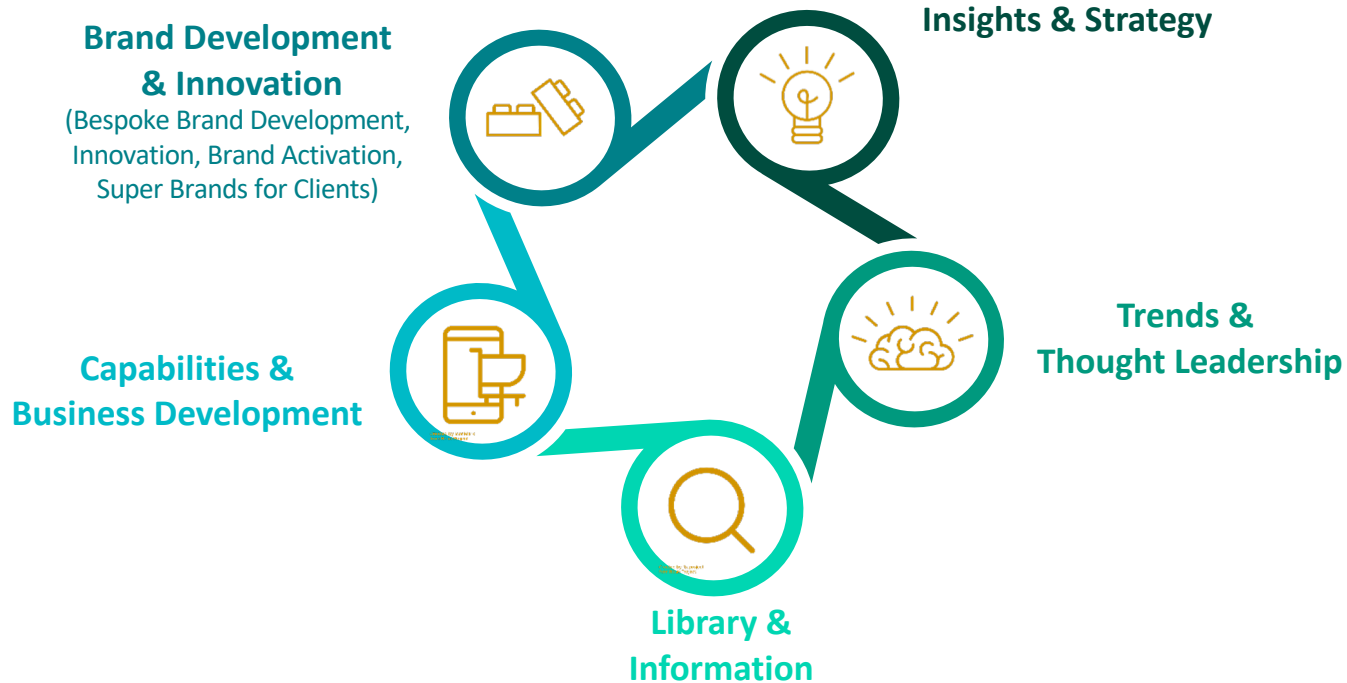


Bord Bia Supporting Seafood Clients

*Insight, Innovation and
Brand Development
Services to drive Growth*



What we cover in the Strategic Insight & Planning Team





Commercial Challenges we help our Clients Address

How do we...

- Create a premium brand to ***deliver category growth*** for our retailers
- Appeal to new cohorts to ***drive volume and value*** for a stagnant brand
- Bring a new brand to ***domestic and export markets***
- ***Future proof*** our brand against emergent competitors
- Reposition our brand to ***regain lost market share***
- ***Optimise communications*** with target consumers
- ***Grow brand presence*** in a new channel
- Move from from a ***B2B to B2C*** business model
- Develop and refine our ***innovation processes***
- Do we ensure ***consistency between online and offline channels***



Commercial Challenges we help our Clients Address

Who...

- Are our **key B2B audiences** and how do they perceive us
- Are our **brand loyalists** and why
- Are the most valuable **customer segments** for us
- Do we need to **recruit to our brand** to stem loss of market share
- Is the **target consumer** for our new to market brand
- Are the **early adopters** in my category
- Is spending more on **D2C purchasing**
- Are our **key competitors** and why are they being successful

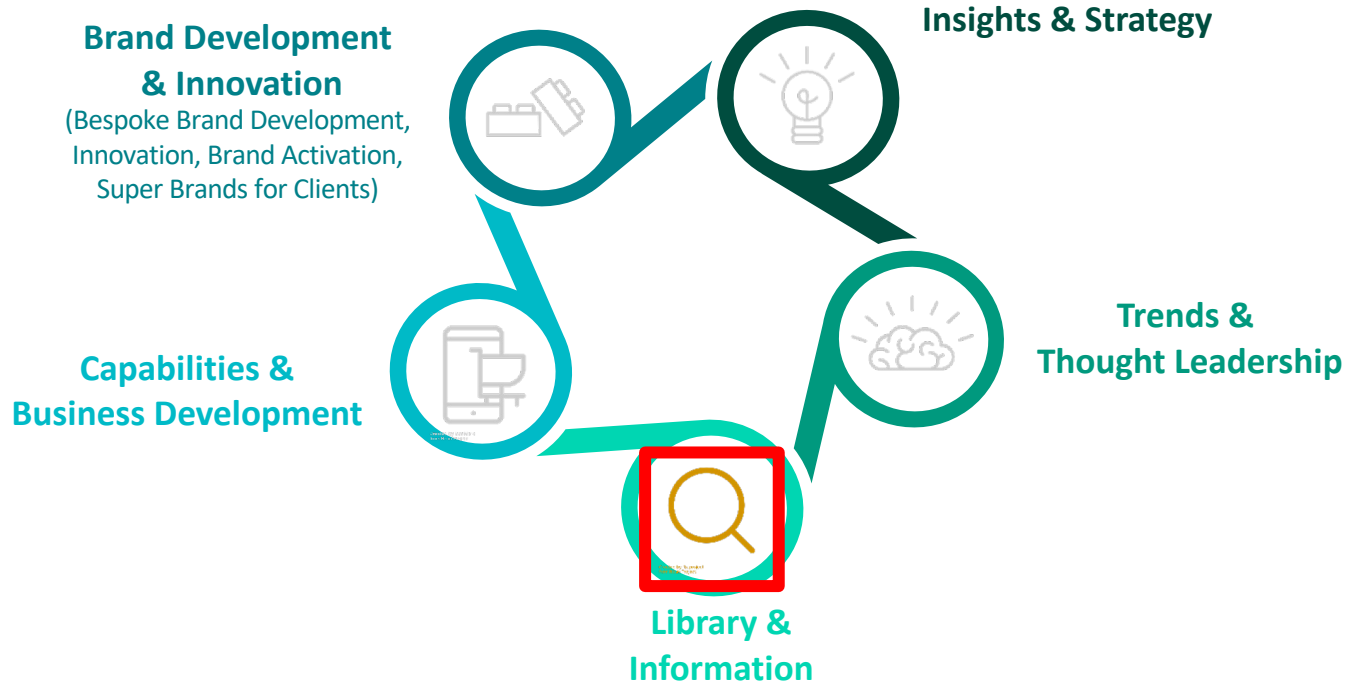


Commercial Challenges we help our Clients Address

What....

- Are the most relevant ***category insights*** for us to harness
- Is the ***size of prize*** for our new product
- ***Export markets*** provide greatest opportunity
- Is our best ***channel/route to market***
- ***NPD*** should we invest in
- Is our optimal ***brand positioning***
- Is the best way to ***build awareness*** for our brand/new product
- Is the ***messaging hierarchy*** for our packaging and communications
- Are the ***key consumer trends*** driving change for our brands
- What is the ***optimal price point*** and can we command a premium offering?

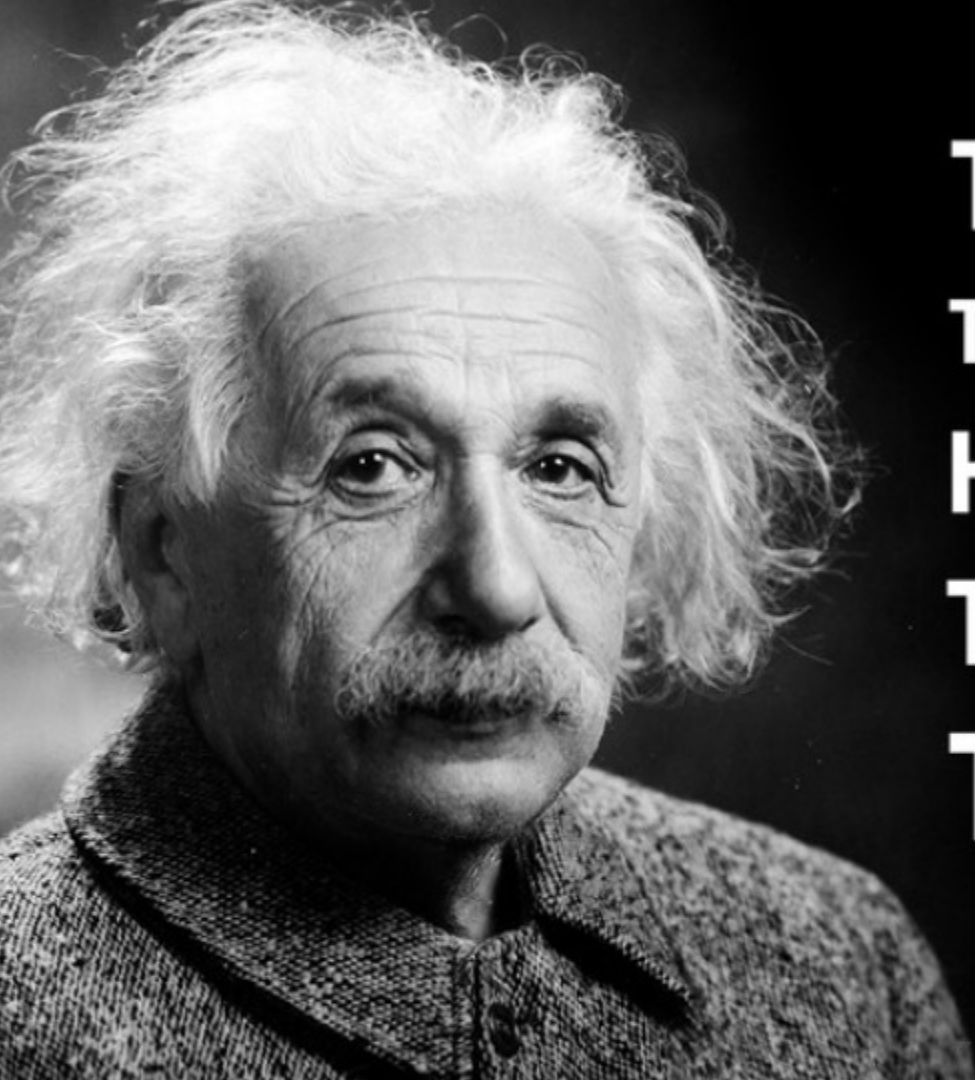
What we cover in the Strategic Insight & Planning Team



Bord Bia Library and Information


The Knowledge & Market
Intelligence Team 2023





**THE ONLY THING
THAT YOU ABSOLUTELY
HAVE TO KNOW, IS
THE LOCATION OF
THE LIBRARY.**

ALBERT EINSTEIN

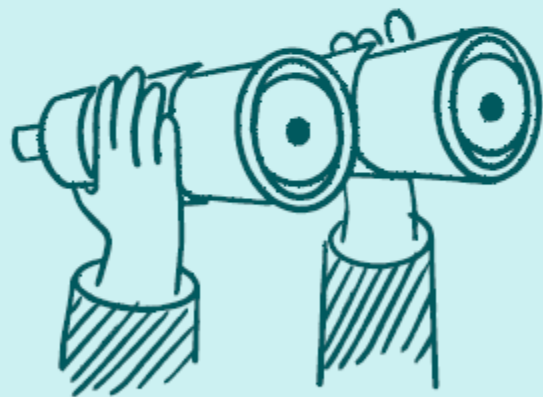
A person is captured mid-jump, leaping from a large, dark, craggy rock on the left towards another similar rock on the right. The person is wearing a dark long-sleeved shirt, light-colored jeans, and sneakers. Their arms are outstretched, and their legs are in a jumping position. The background is a vibrant blue sky filled with fluffy white clouds. The overall scene conveys a sense of risk-taking, confidence, and achievement.

**We give confidence through clarity of understanding, to
help our stakeholders LEARN & KNOW so they GROW**

Bord Bia's **Knowledge & Market Intelligence Team**, helps **ambitious** Irish food **companies** **grow their business**. It does this through providing **remote** or **physical access** to a **world-class Library** collection of **data, information** and **insight**.

Short on time? Send your request for information to the team and it will curate the best possible search results for you and or invite you to visit the Library.

**Discover all the
Bord Bia Library has to offer!**



Insight inside the Library:



Seafood Sustainability Ireland 2022



POST BY

Thomas Collins

Updated July 1st, 2022



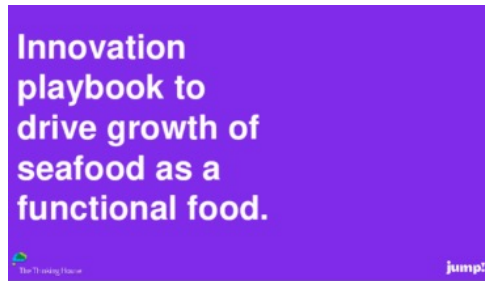
Project Wave: Seafood Sustainability 2020



POST BY

Thomas Collins

Updated September 4th, 2020



Functional Seafood Innovation Playbook 2019



POST BY

Thomas Collins

Updated September 4th, 2020



Selling Irish Meat & Seafood Online 2020



POST BY

Rawaa Shami

Updated November 9th, 2020

Seafood



Seafood
exports in 2022

**€530
Million**



Exports grew by

**€17
million**

Prospects

The prospects for the Irish seafood sector are mixed. The impact of higher input costs, packaging and labour costs and availability, are set to remain as challenges across all species. In addition, consumers potentially switching to cheaper proteins could have an impact on demand.

For **Pelagic** there will be another cut in the Irish quota of 2.5% in 2023. Processors will be challenged to attract foreign landings and add value to the reduced quantity of product available, which will dictate performance in 2023.

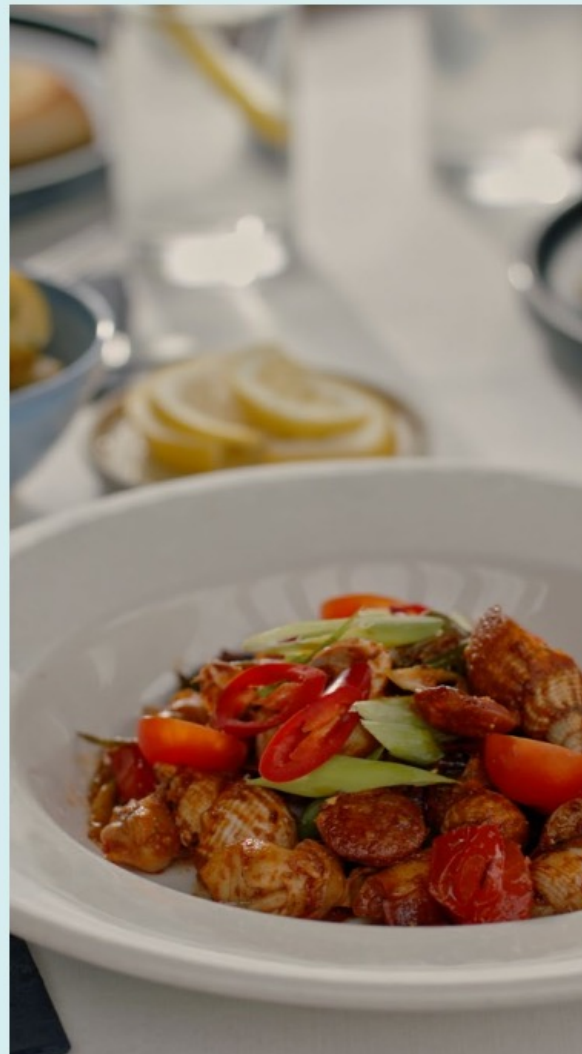
Shellfish is expected to perform well in 2023 with continued growth into the EU, and Asia. The Chinese market will remain challenging due to ongoing Covid-19 restrictions affecting their foodservice sector.

For **Salmon**, greater competition from supplies of organic product from Norway and Scotland is likely in 2023.

Whitefish exports are likely to face a difficult year but demand in the key domestic and export markets should prove resilient.

The industry is investing to ensure greater production efficiencies, installing renewable energy equipment and packaging lines to add value to their product

Exports of value-added seafood, which are captured under PCF, grew by 30% to approximately €125 million. This continues the strong growth of previous years and offers the industry better margins and more options when targeting potential customers. Most of this growth has been to the EU with notable increases to some Asian markets also. We see this trend continuing and are actively working with our seafood clients to add value to their range.



A year of



What we have seen

EMEA: Meal inspiration and sustainability

Many fish product launches are offering **meal ideas and serving suggestions on-pack** to help consumers discover new cuisines and demonstrate how tasty and simple fish is to cook with.

Fish substitute brands are highlighting the environmental benefits of their products more vocally, in on-pack messaging.

APAC: Shelf-stable formats and nutrition

Shelf-stable fish products are seeing a rise in launch activity, appealing to consumer interest in convenient offerings.

Fish substitute brands are flagging up sought after health attributes, such as **high protein and added fibre** claims, as a way to convey a more nutritious and wholesome image.

Americas: sustainability and health

Expectations around sustainability are evolving and seafood brands are being challenged to review their practices and increase transparency.

Consumer fondness for snacking and quick-fix light meals is inspiring on-the-go friendly fish products.

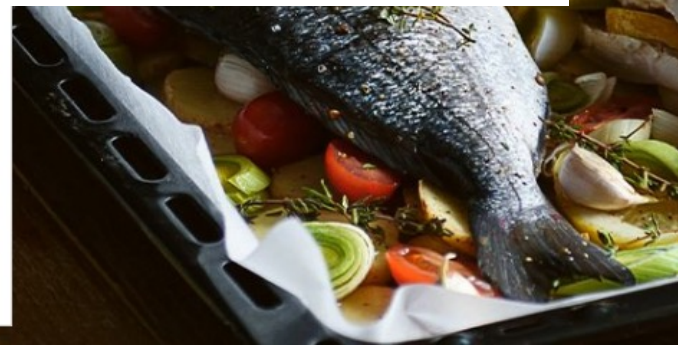
nutritional benefits.



Amrin Walji, Senior Innovation Analyst

JANUARY 12, 2023

REPORT



5 MEGA-TRENDS & 10 KEY TRENDS



Article



Five Key Trends Shaping the Sustainability Agenda in 2023



Jorge Zuniga

10 Feb 23

Given the current challenging economy, it is essential that companies keep abreast of sustainability trends as they evolve, and understand the direct impact on business performance to remain competitive. Euromonitor International has identified five key trends affecting the global sustainability agenda in 2023.

Article



Davos 2023: How Global Risks are Playing Out for Business and Consumers



Euromonitor International

17 Jan 23

The World Economic Forum's annual meeting in Davos, Switzerland shines a light on the global economy and the big themes shaping the world. The central theme for 2023 is "Cooperation in a Fragmented World", as the global economy is experiencing a polycrisis, with multiple interconnected risks weighing on economies, business and consumers.

Article



Understanding Sustainable Consumers



Jana Rude

6 Jan 23

As sustainability grows in relevance and consumers lean towards more sustainable lifestyles, consumer segmentation according to shared environmentally friendly traits and preferences is becoming instrumental for companies seeking to develop and market sustainable products in the right markets at the right time.

Learn, Know, Grow.



Next Step?

Want information and insight to answer your questions/challenges/opportunities under consideration?

Contact the KMI Team at
thethinkinghouse@bordbia.ie

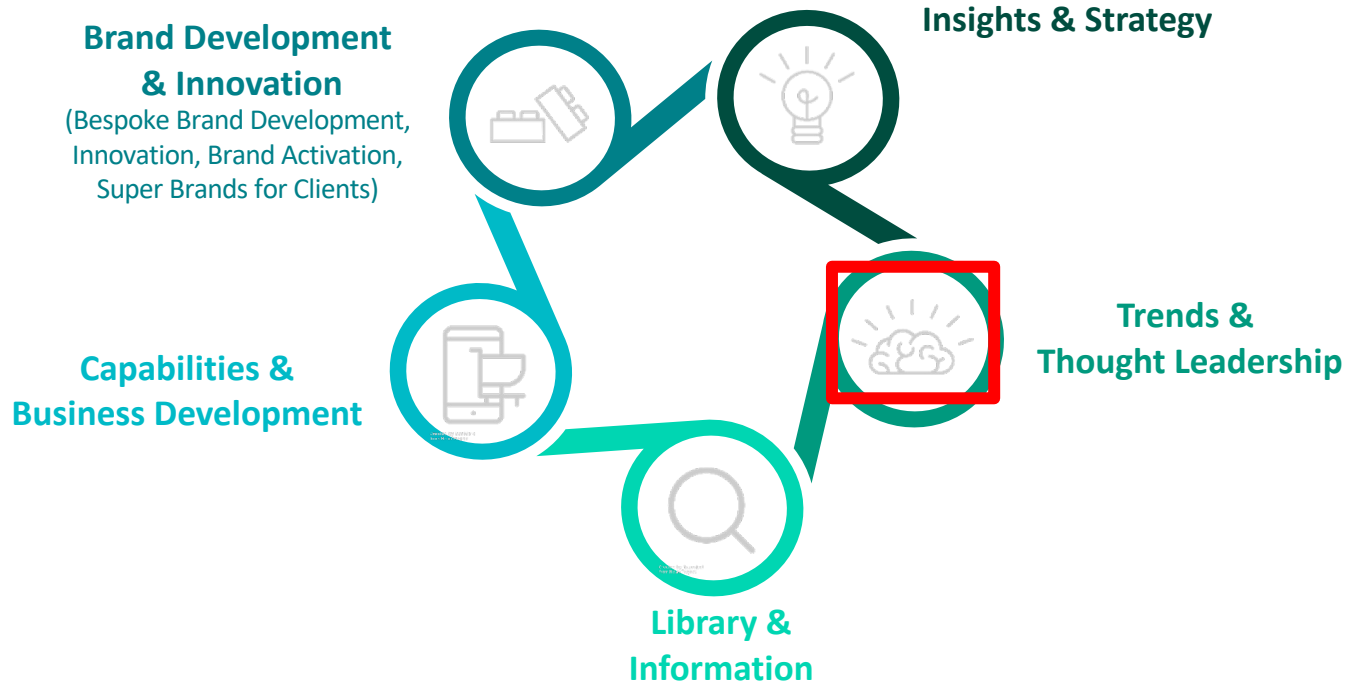
They'll be right on hand to support you

Bord Bia

Trends and Thought Leadership



What we cover in the Strategic Insight & Planning Team



Seafood Futures Study

Study investigating Strategic & Innovation Opportunities
for the Irish seafood industry for a Decade of Change

Commissioned by the Thinking House with Futavista

November 2021

Bord Bia

Consumer Lifestyle Trends

2021 and Beyond



The Consumer and Carbon

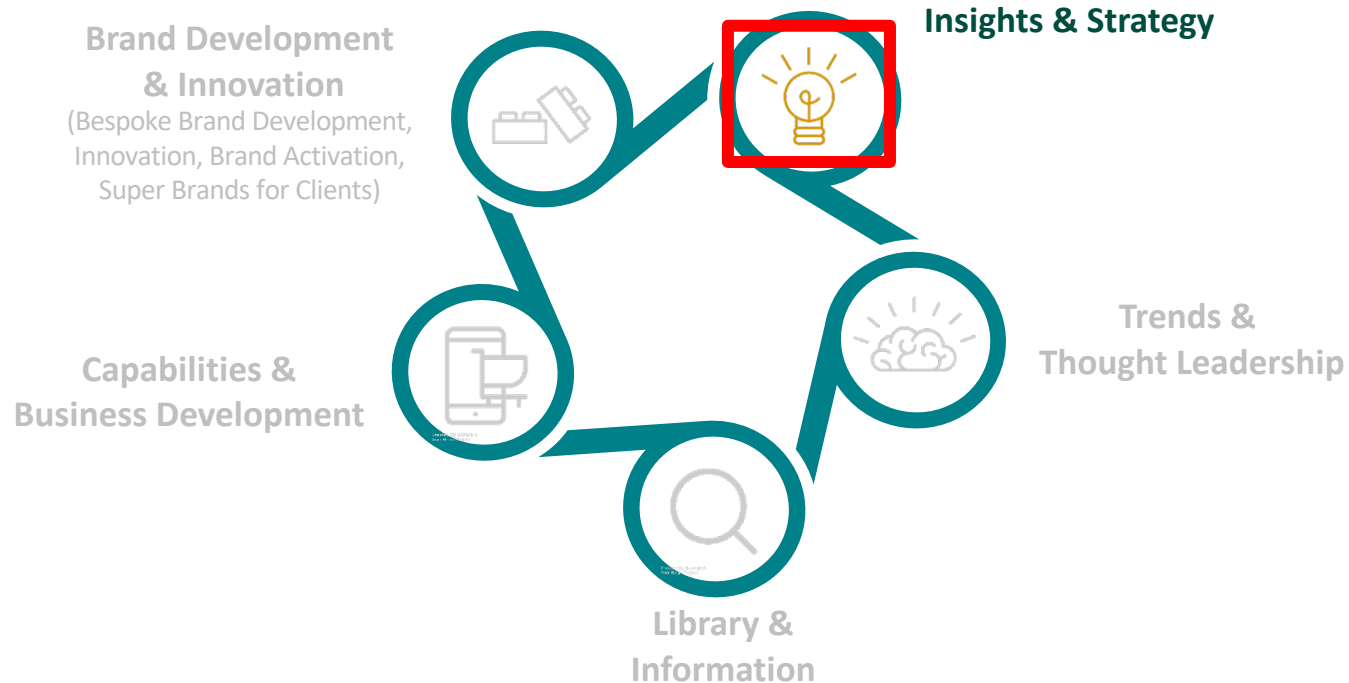
'Cutting through the Carbon Jargon'

Bord Bia

Insights and Strategy



What we cover in the Strategic Insight & Planning Team



5 Key Insights Services

Omnibus (New Service)

Cost effective tool to help answer a **few key bespoke questions** within a quick turnaround, typically with n=1,000 respondents



BITES

Structured online survey with min of n=150 respondents testing **reactions to NPDs**. Available in EU, US & CN (with potential to add other markets)



Taste N Tell (expanding)

Min **sensory test** including tailored questioning with min of n=150 respondents. Completed **at home or as hall tests**. To be expanded globally in 2022



Outsourced

Fully bespoke research projects completed with **external research agency** managed by Bord Bia Insights specialist



In-house

Fully bespoke research completed by **Thinking House Insights team**



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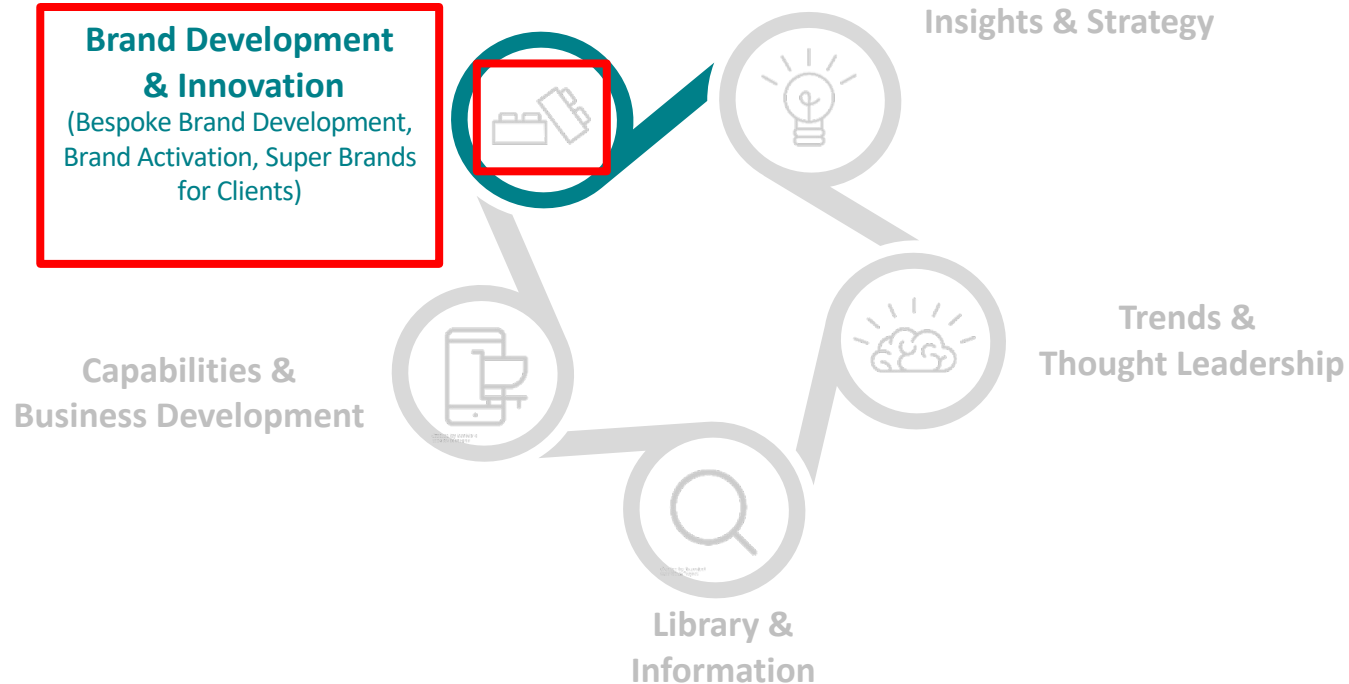
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Bord Bia

Brand Development, Innovation and
Brand Activation



What we cover in the Strategic Thinking & Planning Team



CORE CLIENT BRAND DEVELOPMENT SERVICES

	BESPOKE CLIENT BRAND BUILDING	SUPERBRANDS FOR CLIENTS	BESPOKE CLIENT BRAND ACTIVATION
What is it?	Full-service Brand Development with expert guidance, strategic thinking and project management delivered end-to-end by one of our Brand Development Specialists	<i>A tightly defined, end-to-end Brand Development service for smaller businesses delivered by one of our Brand Development Specialists</i>	<i>Expert guidance, strategic thinking and project management on both short-term, performance marketing and longer-term, incremental brand equity building activities delivered end-to-end by one of our Brand Activation Specialists</i>
What is it used for?	Development of new brands, branded offerings, innovations or brand extensions: <ul style="list-style-type: none">• Insight generation• Proposition building and targeting• Qualitative and quantitative research and validation• Visual identity creation including pack design and brand guidelines	<i>SuperBrands delivers</i> <ul style="list-style-type: none">• <i>Brand proposition,</i>• <i>Qualitative research (e.g. proposition, pack concepts)</i>• <i>Basic brand guidelines</i>• <i>Design to finished artwork (e.g. 1x pack SKU or B2B application)</i>	<i>Brand Activation delivers</i> <ul style="list-style-type: none">• <i>Strategic marketing advice, planning of and Implementation of Brand Activity across</i>• <i>Website Development</i>• <i>Social Media</i>• <i>Digital Marketing</i>• <i>PR</i>• <i>In-store activation</i>
What markets?	ALL MARKETS	ALL MARKETS	ALL MARKETS

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What markets?	ALL MARKETS	ALL MARKETS	ALL MARKETS

Client Case Study Examples



INNOVATION AND BRAND DEVELOPMENT

Loughnanes: Glas and Sons of Butchers

The Challenge/Opportunity

- Increase sales and profitability via a diversification strategy for Loughnanes
- Introduce innovative plant-based food to the chilled category
- Provide a range of premium products that offer broader choice and a higher margin for retail buyers

Scope of Engagement

- Discovery and groundwork
- Audit of global and local competitors
- Target Consumer Profiling
 - Vegetarians and Vegan's for Glas
 - Flexitarians for Sons of Butchers
- Development of Brand Strategy
- Brand Creation: Naming, VI and Packaging
- Qualitative Consumer Research to build and refine insights and brand creation work
- Website Development and Brand Activation consultancy to support launch

The Results

- Both brands ready for launch within 6 months of the first client meeting
- Both gained immediate listings with Tesco, Supervalu, Dunnes
- Additional SKU's launched at retailer request



INNOVATION AND BRAND DEVELOPMENT

North Cork Creamery

The Challenge/Opportunity

- A small butter brand from North Cork Creamery seeking to enter national block butter market, dominated primarily by PL and a single dominant branded player
- Ambition to be seen as 'not just regional'

Scope of Engagement

- Discovery, groundwork and market audit
- Brand workshops to define brand personality, USP and messaging hierarchy resulting in propositions for testing
- Brand Creation: Naming, Visual Identity and Packaging
- Consumer research including focus groups of butter consumers to test propositions, achieve a deeper understanding of the category and explore naming and design concepts

The Results

- Nationwide launch in SuperValu
- Better than expected run-rates, including stores outside Cork, e.g. SV Churchtown, Dublin
- Plans to roll out to other retailers in 2023



INNOVATION AND BRAND DEVELOPMENT

Rebel City Distillery – Maharani Gin launch

The Challenge/Opportunity

- Bord Bia developed the brand for Rebel City Distillery and their first spirit – Maharani Gin.
- Once the brand was created we were then tasked with launching the gin to the Irish market. During Covid!

Scope of Engagement

- We developed an activation launch plan for Maharani Gin. This informed the decision to run a fully integrated PR & Social Media campaign.
- We had to pivot our plans as lockdown impacted our original PR approach, but we redirected our attention online in order to launch the brand and reach our audience.

The Results

- Combined reach of 1.7 million**
- 120,402 reach** for paid-for influencer campaigns generating **193+ click through** to stockists
- 50% growth** in social media following
- Successful online launch event attended by **10 media and drinks influencers**
- 28 product drops to targeted media & influencers with **85% success rate (so far)** in generating positive mentions
- Secured **multiple listings** on foot of the campaign around Ireland
- The brand also managed to go **viral** in India!!



SOFRIMAR BRAND DEVELOPMENT AND BRAND ACTIVATION



MOWI BRAND DEVELOPMENT AND BRAND ACTIVATION



Thank you

Questions?

