

Fingal Agri-Food Strategy 2019 - 2021



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Fingal County
Council



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Local Enterprise Office



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Contents

Acknowledgements		7.5.1 Linkages to SWOT	22
Foreword	2	7.6 Lack of Marketing and Promotion	22
Executive Summary	3	7.6.1 Linkages to SWOT	22
1. Methodology	5	7.7. Recruitment and Staffing	22
1.1. The objectives set out as part of initial brief	5	7.7.1 Linkages to SWOT	22
1.2. Phases	5	7.8. Working Capital/Access to funding	22
2. Introduction	6	7.8.1 Linkages to SWOT	22
2.1 Fingal Food Landscape	6	8. Strategic Actions	23
2.1.1 Fingal Food Supports	6-7	8.1. Strategic Vision	23
2.1.2. Fingal Development Plan 2017-2023	8	8.2 Food Stakeholder Leadership	23
1. Map	9	8.3. Enablers to support the Strategy	23
2.3. Rationale for the Fingal agri-food strategy	10	8.4. Contract Food Project Manager	24
3. National Food Policy Context	11	9. Strategic Goals	25
3.1. Food Wise 2025	11	Conclusion	
Figure 2.	11		
3.1.1. Human Capital and Agri-Food Companies	12		
3.1.2. Competitiveness at Producer Level	12		
3.1.3. Market Development	12		
3.1.4. Innovation	13		
4. Bord Bia Consumer Lifestyle Trends	14		
Figure 3.	14		
Figure 5. Bord Bia Consumer Lifestyle Trends	15		
5. Fingal Food Assets	16		
Figure 6.	16		
6. Fingal Food SWOT Analysis	17		
6.1. Fingal Brexit Analysis Summary	18		
7. Barriers to Growth	19		
Figure 7.	19		
7.2 Policy Threats	20		
7.3. Insufficient Collaboration	20		
7.3.1 Link to SWOT	21		
7.4. Profit v Costs Challenge	21		
7.4.1 Linkages to SWOT	21		
7.5. Insufficient Training and Upskilling Programmes	21		



Foreword



As Mayor of Fingal, I very much welcome this agri-food strategy for the County. The food production sectors in Fingal are very active and the county has a strong footprint throughout the 'farm to fork' cycle. I would like to commend all those involved in the development of the strategy and to also thank the members of the Fingal Food Steering Group for all the time and knowledge they have given the Council during the process. I am also grateful that the membership has committed to continue to work closely as the strategy moves to its implementation phase.

The agriculture and agri-food sectors are very important to Fingal and the county holds a disproportionate share of the total national output. Aided by the work of the Local Enterprise Office, and the wider departments of Fingal County Council, this innovative piece of work will, I'm sure, allow Fingal to continue to be a national forerunner in the agri-food industry.

Cllr Anthony Lavin, Mayor of Fingal



Fingal has a proud history of agricultural production and the agri-food sector remains very important to the local economy today. However, it also faces challenging times in the medium term, particularly in the context of Britain's impending departure from the European Union. The impact of Brexit is already putting significant pressures on the agri-food sector through exchange rate fluctuations. Upon the eventual departure, these pressures will further manifest themselves via increased tariffs, reductions in cost-competitiveness and logistical complexities.

Despite the threats, Fingal is fortunate that the local agri-food sector has so many assets, including food producers of all sizes, a number of prominent coastal towns and villages, and a strong tourism industry. Fingal companies produce a disproportionate share of the national output across many sectors including horticulture, seafood and prepared consumer foods. This is aided by having a market of 1.8 million consumers on its doorstep, and also an impressive infrastructural connectivity to international export markets.

In recognition of the above, Fingal County Council, alongside a steering group of local sectoral experts, has developed this agri-food strategy for Fingal. Already Fingal County Council, through the Local Enterprise Office, is delivering a wide range of financial and non-financial supports to agri-food companies in the county. This strategy builds upon this work and sets out a common framework that will foster innovation and collaboration across the sectors, increasing value added, and maximizing the potential of the agri-food base in the county. I am very excited for the outcomes of this strategy to become evident and for the sector to become more resilient, innovative, and reaffirm itself as one of the key employers in Fingal.

Paul Reid, Chief Executive

Executive Summary



Fingal County Council commissioned a review of the food landscape within the county during 2017 with a view to creating an Agri-Food strategy to help enhance and grow the strong food base, which already exists.

Extensive consultation took place with local food stakeholders and this information was supplemented with desk research on the domestic and global food landscape which also informed the Fingal Strategy development.

Separate reviews took place of the national food strategy, Foodwise 2025 and current Bord Bia consumer trends. Learnings from both of these also informed the strategy formation.

The research conducted pointed to the many strengths the food sector in the Fingal region has including:

- Home to Ireland's largest growing vegetable region with 12% national growing share
- Proximity to 1.8 million consumers which gives faster access to market for fresh produce
- The scale and expertise of its food stakeholders, with a cohort of some of Ireland's foremost food leaders located within Fingal
- A growing Fingal café/restaurant reputation is emerging
- The region boasts food destination status with its coastal villages, food festivals and fishing ports





Key weaknesses identified centred on the following:

- Minimal collaboration or clustering between food stakeholders
- No single Fingal food information point e.g. Fingal producer directory
- Minimal examples of foodservice operators interacting with and promoting the local food community
- Limited number of farmers markets

The key opportunities revolved around increasing collaboration and clustering between food stakeholders in order to facilitate greater knowledge transfer. The communication of Fingal's food story, particularly on menu, was also highlighted as an opportunity.

The threats identified tended to mirror issues which are also evident on the national food landscape such as Brexit, rising business costs etc. At local Fingal level, a failure to achieve support for this strategy implementation was highlighted as a potential threat.

Stakeholders were asked to identify key barriers to growth.

Seven barriers were identified:

- Insufficient collaboration between food stakeholders meant knowledge transfer was not being maximised within the region
- The challenge for businesses to make a profit, versus rising on-going costs
- Challenges with legal compliance (meeting the requirements and the cost of same)
- Lack of marketing and promotion of the Fingal regions food story
- Recruitment and staffing challenges
- Access to working capital and funding
- Insufficient training and upskilling programmes

Having analysed the stakeholder feedback, reviewed other global food strategies and studied the barriers identified, six goals were set out to guide the Fingal Food Strategy

1. To foster greater collaboration and clustering between stakeholders
2. To be viewed as the proactive food innovation leaders
3. To improve business management performance
4. Support the attraction and retention of food talent into the Fingal region
5. To create a Fingal food and drink tourism destination
6. To explore the establishment of a physical Agri-Food hub to support clustering and collaboration.

1. Methodology

Fingal County Council, together with the Local Enterprise Office Fingal, set out to create an agri-food strategy for the food sector. James Burke and Associates (JB&A) was appointed to facilitate the creation of this strategy following a tender process.

The following methodology was used:

- Food producer focus groups
- Foodservice operator and tourism operator focus groups
- One to one interviews
- Desk research on the domestic and international markets
- Survey Monkey completed by 33 participants

1.1. The objectives set out as part of initial brief

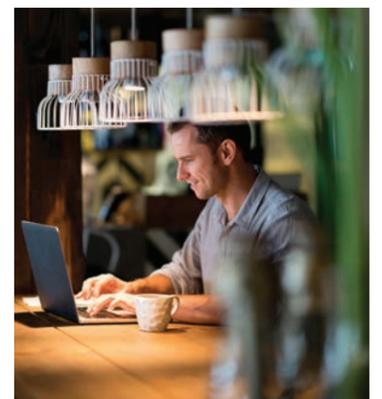
The overall task was to develop an Agri-Food Strategy for Fingal. The outputs set out in the brief were:

- To gather baseline data on the size of the agri-food industry (and various sub-segments) in Fingal including:
 - o Number of businesses
 - o Level of full- part-time employment
 - o Estimated output and contribution to value added in the economy
 - o Extent of exporting activity
 - o Comparisons of performance within these metrics against national and regional trends
- To assess barriers to growth of the industry within Fingal and propose workable solutions to overcoming such barriers, focusing on those within the remit of local and regional actors
- In particular, to assess barriers to local firms in achieving scale and propose workable solutions to overcoming such barriers, focusing on those within the remit of local and regional actors
- To assess the existing level of collaboration within the sector, vertically and horizontally and potential for "competition" or cluster mechanisms as distinct policy interventions
- To assess the potential for, and as relevant develop specific initiatives in relation to producer education, farmers' markets, retailer / restaurant and food service affiliate programmes,
- To explore the potential for agri-food and food-tourism within Fingal and propose specific actions to foster growth in this area

1.2. Phases

The project was broken down into distinct phases listed below. Each phase informed the next phase.

- Client commencement meeting
- Quantifying the size of the sector
- Desk research
- Assess barriers to growth
- Assessment of collaboration
- Report writing and conclusion



2. Introduction

2.1 Fingal Food Landscape

Fingal has a very strong association with the agri-food sector and is home to many local, national and international growers, food producers, distributors, etc. It is also home to a vibrant landscape of cafés, restaurants and tourist attractions.

Fingal is the principal county within the Dublin region for agricultural activities and has a national reputation for its horticultural sector. The county is home to some of the country's most successful horticultural based businesses and activity. These include some of Ireland's largest horticultural businesses, some of the biggest growers and suppliers of potatoes and onions to the Irish retail sector and major food distribution hubs. Accordingly, Fingal is excellently placed to meet the targets included in Food Wise 2025, for the benefit of the national economy but also for significant benefit of Fingal's local economy.¹



In addition to horticulture, there is a large cohort of producers involved in adding value to primary production, with a mix of small and large companies leading some key sectors e.g. crisps, ready meals, bakery, charcuterie, etc. Newer categories have been emerging in recent years with new Fingal producers commencing production in brewing, healthy snacks, international sauces and meals, and “added value” seafood.

Tourism is also an important indigenous sector of the Fingal local economy generating income and employment. Tourism, alongside the agri-food sector and other service industries, is widely expected to be a driver of economic growth. Up to 800 businesses, provide accommodation and catering for visitors to Fingal. The industry is characterised by a large number of SMEs and an estimated 3,000 full time job equivalents are provided within the guest accommodation sector in Fingal, with a further 2,000 employed in the catering sector across the County. Visitors to the area support jobs in transport, retail, entertainment and other service sectors used by the local population.²



Estimates based on figures available through various consumer information websites suggest that there are close to 200 restaurants and cafes within the region and in 2016, three of the towns from Fingal were short-listed to the top 10 locations in Ireland for the best “foodie destination in Ireland 2016”. Several towns have established food leadership teams.

2.1.1 Fingal Food Supports

Fingal County Council, through the Local Enterprise Office, have put in place a series of programmes and initiatives to support the agri-food sector in recent years. Programmes and activities specific to the agri-food sector which are provided through the Local Enterprise Office include:

¹ Draft Fingal Development Plan 2017 – 2023 (Stage 2), Chapter 6, Economic Development (6.10)

² Fingal Tourism Strategy 2015 – 2018 – Chapter 2 (2.1)

- **Dublin Food Chain Initiative**

Established in 2010, Dublin Food Chain is a marketing and networking forum which represents many of the outstanding food and drink producers, retailers, foodservice operators and distributors that are based throughout Dublin.

The Dublin Food Chain is an initiative jointly supported by the four Local Enterprise Offices in the Dublin region (Dublin City, Dun Laoghaire Rathdown, Fingal, and South Dublin). Bord Bia also plays an active role in the Dublin Food Chain.

Local Enterprise Office Fingal lead two Dublin Food Chain events per year, which have a combined attendance of over 200 food industry stakeholders. In addition, LEO Fingal support an on-line producer directory, digital platforms and other resources, targeted at the food community.

- **Digital School of Food**

The Digital School of Food is an initiative of the Local Enterprise Offices in the Dublin region led by Local Enterprise Office Fingal. Partner agencies include Bord Bia, Enterprise Ireland and DIT. It involves an online eLearning platform containing 20 courses targeted at producers from start up to growth. As well as delivering key learnings, the e-learning platform contains video of real producers giving advice on each topic, as well as downloadable resources and templates.

- **Food Starter**

The “Food Starter” Programme is targeted at pre start up producers, and those within the first 24 months of trading. The four Dublin Local Enterprise Offices rotate the leadership of this programme between them, and typically, there are 5 intakes of this programme during a calendar year. 83 producers participated in 2017, of which 31% were from the Fingal region.

- **Food Academy**

Food Academy is a joint initiative of the Local Enterprise Offices, Supervalu and Bord Bia. The programme provides an opportunity for small-scale food and drink production businesses to grow their business strategically by equipping owner/managers with the skills necessary to run their own business. It also gives participants an opportunity to get their products listed in Supervalu stores. Food Academy Start leads on to Food Academy Advanced for suppliers that successfully come through the Supervalu trials. Fingal producers account for 35% of the Dublin region Food Academy participants.

- **Food Academy Advance**

Food Academy Advance is a programme for high potential producers identified within the overall Food Academy producer pool (over 330 producers). The Fingal region has over performed within Food Academy Advance. Fingal has had 5 producers participating on Food Academy Advance since its commencement in 2015 which represents 10.6% of the national intake for this programme.

- **Other Business Supports**

In addition to the above programmes, LEO Fingal provides grant assistance, mentoring services, branding and technical supports etc. to food stakeholders throughout the county. Fingal County Council also support the food tourism sector through various tourism initiatives and projects.



2.1.2. Fingal Development Plan 2017-2023

The Fingal Development Plan includes references to the agri/food sector highlighting the importance of the sector to the region (ED 73-77):

- Engage and collaborate with key stakeholders, relevant agencies, sectoral representatives and local communities to develop the agri-food sector in Fingal, to promote and showcase the agri-food sector, including supporting events such as the Flavours of Fingal, and to ensure that the economic potential of the sector is secured for the benefit of the local economy, and national economy.
- *Ensure the economic benefits associated with promoting the County's agri-food sector are balanced with due consideration for the conservation and protection of the rural environment.*
- *Promote the growth of the agri-food sector in Fingal by responding to the varying needs and requirements of the different components with the sector and by creating high quality built environments offering a range of building sizes and formats, supported by the targeted provision of necessary infrastructure.*
- *Encourage and provide opportunities specifically linked to food, horticulture, agriculture and the development of value added opportunities in these areas.*
- *Develop a strategy for young person's healthy eating in concert with local growers in North County Dublin highlighting cost effective and convenient healthy eating recipes and habits for young people in order to connect young people with the local growing industry and to promote healthy and active living.³*

³ Draft Fingal Development Plan 2017 – 2023, Chapter 6, Economic Development (6.10) ED73 – 77



Encourage and provide opportunities specifically linked to food, horticulture, agriculture and the development of value added opportunities in these areas.



Figure 1. illustrates the map of the Fingal region
Map 1



2.3. Rationale for the Fingal Agri-Food strategy

Recognising that Fingal has a very strong association with the agri-food sector and is home to many local, national and international food producers and suppliers, Fingal County Council has identified the sector as one that holds strong potential for further growth. Through the formation of an agri-food strategy, Fingal County Council plan to enhance the reputation of Fingal as a prime food producing county.

The development of an integrated agri-food strategy is an initiative to support the growth of food producing and manufacturing businesses in Fingal.

The rationale for formulating this strategy is as follows:

- Ensure that all Fingal food stakeholders and food agencies have a common roadmap
- Provide a forum for agencies connected with the local food and drink sector to work together
- Develop and strengthen industry collaboration within the region
- Bring greater vision and direction to the food sector within Fingal
- Identify priorities to be addressed
- Allow for funding to be targeted in a cohesive manner
- Make greater use of existing resources
- Simplify decision making
- Improve communications to all cohorts
- Ensure there is “joined up thinking” in relation to the food sector



3. National Food Policy Context

The Irish Government has set out a clear road map for the agri-food sector through its Food Wise 2025 strategy, and Bord Bia has conducted research to identify key consumer cohorts that are likely to influence the food landscape. These are set out below.

3.1. Food Wise 2025

It will be important that the Fingal food strategy is consistent with national policy in relation to the food sector. The following is an extract from Food Wise 2025:

Building on success to date, the Food Wise 2025 Strategy has set out a vision of the industry continuing along an ambitious course of growth, recognising the importance of strategic foresight if emerging opportunities are to be fully realised in the decade ahead.

Food Wise 2025, sets out a cohesive, strategic plan for the development of agri-food sector over the next decade, foreseeing a sector that acts more strategically and achieves a competitive critical mass in the international marketplace while targeting more quality conscious consumers who will recognise and reward Ireland’s food producers for their sustainable production and high-quality produce.

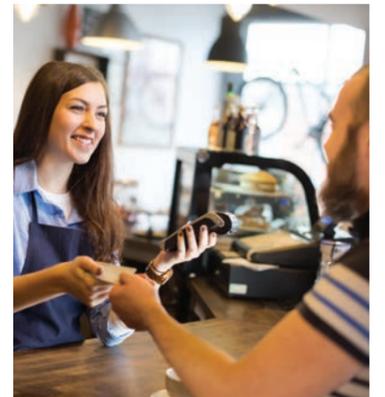
Food Wise 2025 sets out its objectives under four main pillars. These are Human Capital, Competitiveness, Market Development and Innovation. See Figure 2. The Fingal agri-food strategy will be informed by these national priorities.

³¹ Foodwise 2025 (2015)

Figure 2.



Source: DAFM



Each of these four national pillars are expanded in the section overleaf to highlight specific actions. These national priorities for the agri-food sector will be reflected in the Fingal Strategy.



3.1.1. Human Capital and Agri-Food Companies

The processing sector has a number of challenges and skill needs which must be addressed if food companies are to develop and reach their potential towards 2025.

Actions:

- Reconvene the expert group on future skills for industry and update the report on future skills needs in the food and drink sector at management, financial, innovation, and operational levels
- To increase innovation capacity and absorption capacity across the sector Enterprise Ireland, in association with the relevant institutions will design and develop a Food Innovation Fellowship programme to increase and embed technical capability with food companies
- Explore formal opportunities to transfer learnings from food and drink production to new sector entrants via mentoring, training and skills transfer by industry, skillnets, universities, schools and agri-aware

3.1.2. Competitiveness at Producer Level

Given that over 80% of Irish food production is exported and therefore exposed to International price and exchange rate volatility, managing and maintaining our international competitiveness is a key fundamental for the future development of the sector.

Recommendations:

- To build competitiveness Enterprise Ireland will continue to promote and develop the lean Business offer to help agri-food companies to adopt world class manufacturing standards and to drive productivity growth through skill development and lean re: engineering
- Industry to conduct a study into improving transportation and logistics links with the UK market for Irish agri-food and beverage companies to identify opportunities to increase supply chain efficiency and reduce costs
- Teagasc 'Options' programme to continue to support on-farm diversification measures and programme impacts to be monitored and measured

3.1.3. Market Development

- State agencies to support market prioritisation and targeting:
 - o Establish mechanisms to support market prioritisation strategies and market decision making through provision of consumer insights in specific regional and country markets including the feasibility of establishing a Centre for Consumer insight
 - o Bord Bia to continue to invest in innovative buyer contact initiatives and inward buyer visits across all existing markets and introduce into emerging markets
 - o Industry to pursue and seek joint venture/partnership opportunities to enhance market access opportunities



3.1.4. Innovation

- Future agri-food research to be informed by consumer insights to improve translation of research output into commercial products on market
 - o Bord Bia to explore with industry the potential for the development of a Centre for Consumer insight which should provide consumer insight to inform future investment in research and development by Irish agri-food research bodies
 - o Centre for Consumer Insight to inform market validation of future publicly funded research investments
- Improve capacity of agri-food companies to absorb Research and Innovation output from Research bodies
 - o Enterprise Ireland will create an FDI and Innovation Portal to improve connectivity across the Irish innovation system for Food and Beverage companies
 - o Industry and EI should continue to drive an industry-led network of Irish agri-food companies which access Research bodies in a collaborative/partnership manner on specific innovation/research challenges



Future agri-food research to be informed by consumer insights to improve translation of research output into commercial products on market



4. Bord Bia Consumer Lifestyle Trends

To underpin the Fingal strategy formation and keep the consumer central to the focus, it is worth reviewing the key consumer lifestyle trend information identified by Bord Bia.

Figure 3. sets out these trends, followed by a narrative on each consumer trend. While these trends are known to the majority of food stakeholders, their relevance to the Fingal food strategy formation will be shown later in the strategy goals.

Figure 3.

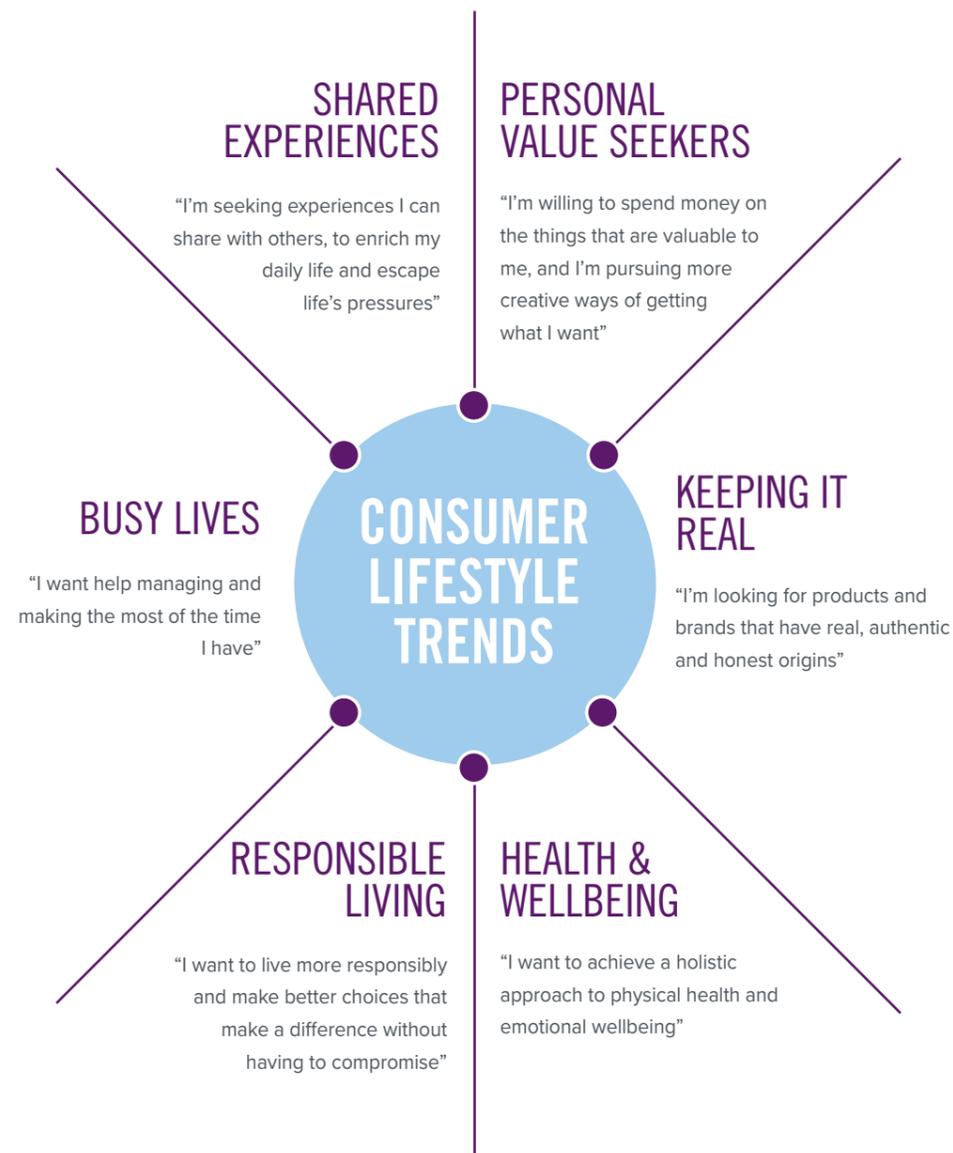


Figure 4. Bord Bia Consumer Life Style Trends

- Busy Lives:** As lives get ever busier and more mobile, people want smarter ways of managing their lives and maximising their time. The recession caused consumers to slow down somewhat and re-evaluate priorities. However, the pace of life and change remains fast, and consumers' days are largely still full and frantic.
- Shared Experiences:** Enjoyable and novel experiences continue to form moments of escapism in consumers' lives and these experiences are increasingly geared towards sharing. Interest in small pleasures continues, but a desire for more intense and meaningful experiences and new sensations is emerging. Online social networks continue to play an ever-more significant role in this area, as individuals' digital identities become more and more central to their sense of self.
- Personal Value Speakers:** Getting the best value for money remains a top priority for consumers, although what 'value' represents continues to evolve. Despite a more favourable economic outlook, people are still paying careful attention to how the monthly pay cheque gets used – they are ready to spend, but not on any old thing. Consumers still want exceptional functional performance from products and services but are increasingly prioritising brands whose personalities and values align with their own.
- Keeping it Real:** Real products, made from real ingredients, by real people are increasingly important anchors for consumers in our ever more digitalised, intangible and shifting world. Simple and traditional ingredients and production processes are playing an increasingly important role in reassuring and 'grounding' consumers, connecting them to the tangible and unchanging aspects of life. Keeping it 'Real' remains an absolutely central trend for food and drink categories. However, brand activity in this space has become crowded, and in order to succeed, brands must have clear values and stick to them 100%.
- Responsible Living:** While people remain disappointed with government efforts to tackle the world's big social and environmental problems, a new era of optimism is emerging. People are increasingly relying on themselves and their communities to instigate positive change. In particular, individuals are recognising that they have significant power if they work together with other members of their social networks. Brands should look to support consumers in their networked efforts to stand up and make a difference.
- Health and Wellbeing:** To deal with their maxed-out lives, today's consumer has fully embraced a more holistic approach to looking after their well-being, which increasingly focuses on mind as well as body. People are embracing both science and nature to create sophisticated and tailored lifestyle plans. Paying attention to all facets of health has become a symbol of status. With this mind-set comes a growing desire to plan, track and measure different aspects of one's health, and an appetite for smart health management tools.



5. Fingal Food Assets

Fingal has its own distinct food landscape. To inform the food strategy formation, a list of “food assets” was identified and is shown below in Figure 5.

These assets are merely a statement of fact and are not endorsements of whether any is a strength or otherwise. The strengths etc. will become clear in the SWOT section. The assets below however do represent items on the Fingal food landscape which can all be leveraged to help generate potential commercial success.

Figure 5.



6. Fingal Food SWOT Analysis

Desk research, stakeholder focus groups and individual meetings conducted informed the SWOT analysis below. This SWOT analysis will underpin the strategy formation set out later in the document.



6.1. Fingal Brexit Analysis

In June 2017, Bord Bia published The Brexit Barometer. This tool aimed to assess the exposure of Bord Bia's clients to Brexit across six key pillars.

The Brexit "key sector analysis" highlights the following:

- **Dairy:** "This sector is heavily export dependent with a well-diversified customer base across markets. Identify alternative markets of scale for cheddar is a key concern". This does not have a major impact on Fingal food stakeholders given the relatively low share of dairy producers.
- **Beef:** "Respondents are extremely dependent on exports with the UK being the dominant market. Active customer acquisition plans are in place to avail of sales growth opportunities". While there is some beef farming within the region, this does not have a major impact on Fingal food stakeholders.
- **Lamb:** "The UK market is competitive and susceptible to price based switching. Opportunity exists to build stronger relationships with EU customers". While there is some lamb rearing within the region, this does not have a major impact on Fingal food stakeholders.
- **Pig Meat:** "The UK market is focused on price, with respondents reporting a low engagement process with key customers". This does not have a major impact on Fingal food stakeholders.
- **The beverage alcohol sector** has well developed non-UK export markets and is comfortable with the levels of in-house customs related experience. The non alcohol sector has a stronger dependency on the ROI domestic and UK markets. Beverage production in Fingal is at an early stage.
- **Prepared Consumer Foods:** While the sector is not as dependent on exports as some, it relies on UK sales for 31% of total revenue. This cohort is larger within the Fingal region and therefore potentially more vulnerable.

Summary

There are significant Brexit supports available through Bord Bia, Enterprise Ireland, the Local Enterprise Offices and other agencies who are already active in this area.

The Brexit Barometer lists key risks for this group as follows:

- o Tariffs
- o Only 53% of respondents believe their companies are adequately resourced to target new customers
- o For those already exporting to the UK, there is a high dependency on a small number of customers
- **Seafood:** "The sector has significant non-UK export sales, and is confident of continued new opportunities in both the UK and alternative markets due to increased demand for seafood internationally. Concern that increased lead times due to supply chain (Via the UK to global markets) could pose some challenges". While this sector has a representation within the Fingal region, its diverse global markets may insulate it.
- **Horticulture:** "The sector is very reliant on UK exports and does not think those revenues could be replaced by alternative markets. (the analysis for horticulture focused primarily on the mushroom, soft fruit and amenity sectors)" which is not 100% reflective of the Fingal landscape. This represents the largest food stakeholder group within Fingal, therefore is a concern. The Brexit Barometer goes on to highlight the following in regard to horticulture:
 - o Companies need to take more actions to prepare for Brexit, such as modelling the impact of tariffs on UK sales
 - o 63% of respondents do not sell into non-UK export markets
 - o Only 50% of respondents have a currency risk management plan in place
 - o Significant proportions of respondents do not think that viable alternative markets exist

7. Barriers to Growth

The consultation phase with Fingal food stakeholders identified seven barriers which are shown in Figure 6. and are expanded below.

While some of these have already been picked up in the SWOT analysis, these barriers are a representation of the most common issues which were raised during the process. As well as explaining the barriers below, each one is linked back to the SWOT analysis.

Figure 6.



7.2 Policy Threats

While Fingal agri-food sector holds a considerable competitive advantage, there are a number of threats on the horizon which need to be monitored in order to ensure that the local competitive strengths are not eroded:

Skills

A shortage of certain skillsets is becoming a significant threat to the prosperity of the Fingal agricultural sector and is particularly acute in horticulture. The shortage of labourers migrating from other European Union countries has resulted from improved employment levels, job opportunities and economic buoyancy elsewhere. In response, the Department of Business, Enterprise and Innovation are to, on a pilot basis, amend the Employment Permit Regulations in order to increase the number of non-EEA workers in the Irish agri-food sector.

Housing

As with many of the other sectors of the national economy, the shortage of accommodation is placing significant pressure on the competitiveness of the agricultural sector in Fingal. The impact of this is two-fold with increasing rental costs threatening competitiveness, while temporary agricultural workers occupying homes that would otherwise be available on the private rental market, is pressurising the local housing stock.

Cost Competitiveness

The above, alongside a combination of other factors, can potentially conflate to put upward pressure on costs for producers in Fingal. This will serve to increase prices, making Fingal products less competitive in the domestic and international markets. Fingal County Council is continuing to closely monitor these factors and will, where needed, take the necessary steps to ensure the competitiveness of the county's agriculture base is protected.

These issues do not come under the remit of this document as activities to alleviate these pressures are on-going through numerous other FCC initiatives.

7.3. Insufficient Collaboration

This barrier was raised equally by processors/producers and foodservice operators. The context of the processors and producer's comments was that there could be more work done to collaborate on issues like common purchasing, knowledge sharing issues. The foodservice operators saw a need for greater collaboration between the various towns within the region so that there would be synergies between the activities in each area. Examples included:

- *There is little synergy between the three Foodie Destination coastal towns of Skerries, Malahide and Howth, and other towns and there is potential for hosting collaborative food-based events*
- *I would welcome support from large business owners to share best practice with small to medium sized businesses*



7.3.1 Link to SWOT

Within the strengths, it was identified that the region has many large companies and some of Ireland's foremost food leaders, which would be a strong addition to any cluster models. This strength can be leveraged when providing solutions to this barrier.

7.4. Profit v Costs Challenge

While profit was mentioned across all sectors, there was a common theme with processors/producers that with only six key large retail customers, the opportunities to generate volumes and improve profitability were limited. The high requirements by multiple retailers generally meant additional costs for the processor/producer and in some cases not all product would be suitable to supply these channels because of tight specification requirements, thus leading to potential waste or a need to shift this surplus product at reduced prices. Rising costs emerged on several occasions as a challenge. Stakeholder quotations gathered during the interviews below:

- *Rising insurance costs are a challenge*
- *Distribution – a huge challenge for start-up food producers. Leinster can be covered but expansion nationally is a cost challenge.*
- *Increased labour costs*
- *Price wars – retailer price matching puts pressure on margin*

7.4.1 Linkages to SWOT

The opportunity to harness volume and combined buying power as set out in the strengths will help provide solutions here. A number of stakeholders from the region are already part of purchasing projects and have experience in this area.

7.5. Insufficient Training and Upskilling Programmes

While stakeholders acknowledged the strong calendar of training provided by the Local Enterprise Office, several pointed to the lack of food specific upskilling courses e.g. social media for food businesses, HACCP training. The challenges with training typically revolved around the cost of providing it for stakeholders. Stakeholders pointed to the following topics as an example of gaps in the training calendar.

- Social media for food companies (while stakeholders recognise that LEO already provide social media training, there was a request for food focused training to take place at least once every six months)
- Video skills for the food sector (recognising that video is now the number one digital marketing tool, food stakeholders had requested a specific workshop)
- "Cross selling" training for front line staff in the foodservice sector. The objective of this training is to allow café and restaurant staff refer visitors to other food tourism sites within the Fingal region
- "Place on a plate" training for chefs and food managers. This training would be designed to increase the understanding by chefs and food managers of the unique point of difference they can create by embracing local food and Fingal food provenance stories

Distribution – a huge challenge for start-up food producers. Leinster can be covered but expansion nationally is a cost challenge.



7.5.1 Linkages to SWOT

Within the opportunities section, knowledge transfer and strengthened training has been identified and will help address this barrier. A strong knowledge base also exists among the larger stakeholders and there will be opportunities to transfer this to others through peer learning rather than just formal training.

7.6 Lack of Marketing and Promotion

The main source for this barrier originated from the foodservice sector, in particular when talking about the tourism opportunity. It was felt that the region lacked a distinct identity and wasn't effective enough at showcasing its destination status. There were also some processors/producers who shared a similar view.

7.6.1 Linkages to SWOT

The strengths clearly identify that the region has a strong story to tell and a willing group of stakeholders. This will support improved local food marketing.

7.7. Recruitment and Staffing

This barrier was raised on numerous occasions and originated from growers, producers and foodservice operators. The most common examples were:

- Growers or processors unable to find/recruit suitable staff for manual work
- Large processors finding it difficult to hire skilled staff for specific technical work
- Foodservice establishments struggling to find chefs of a suitable calibre

The barrier was evident across the spectrum of company sizes from smaller businesses to the very large companies.

7.7.1 Linkages to SWOT

Within the SWOT, the opportunities point to the potential to strengthen the sector and the regions appeal as a credible employment destination.

7.8. Working Capital/Access to funding

This was the single most common barrier identified by processors and producers. The context varied between those struggling to raise the appropriate funding who are typically at small to mid-stage, and those who were able to secure funding, but found the process tedious and lengthy. A common theme among small to mid-sized producers is cash flow constraints caused by customer payment terms. A number of producers referenced the dilemma when they grow too large to be eligible for supports by their Local LEO, and yet might not be eligible for support from Enterprise Ireland. Examples of stakeholder comments:

- *"I am currently looking to purchase new automatic equipment and I am caught between LEO supports and Enterprise Ireland"*
- *"The more we grow, the harder it is to get paid"*

7.8.1 Linkages to SWOT

This has its origins from weaknesses identified but has the potential to leverage opportunities like improved training and upskilling to allow business owners greater knowledge of the funding landscape.



8. Strategic Actions

The following section takes on board all of the information gathered during the research phase, and uses it to create strategic actions as part of the formulation of the Fingal Food Strategy.

8.1. Strategic Vision

'To enhance the Fingal agri-food sector as innovative, adaptive & globally competitive, through innovative clustering and collaboration models. To harness existing strengths, scale & leadership for the good of Fingal food industry.'

8.2 Food Stakeholder Leadership

For each of the strategic goals below industry stakeholders will need to take a proactive role in each of the initiatives. From the research conducted as part of the formation of this strategy, it was clearly identified that initiatives led by stakeholder groups in other regions were far more successful than those led by a government agency.

While it is envisaged that there will be some element of financial support for the initiatives set out below, industry stakeholders need to be willing to contribute to initiatives that will benefit their business.

The Fingal Food Steering group established during 2017 to support the strategy formation has already contributed significant direction, support and time to the process, and are well placed to take the goals to implementation. The group make up represents some of Ireland's best food talent and vision. This will greatly help to influence the strategy implementation success.

In terms of structure and meeting frequency to support the strategy implementation, this report recommends the following:

- The steering groups should have a lead person from a number of sub groups to lead each goal below. Each sub group should have a lead
- Sub groups will probably need to meet monthly for the first few months and then as appropriate
- The main steering group should meet quarterly. The focus should be on the implementation of the strategy and reviewing sub group progress

8.3. Enablers to support the Strategy

For the strategy to be successful, key elements need to be in place and experience from other regional food strategies points to a correlation between the items below being in place and the potential success of the strategy:

- An "information co-ordination role" should be provided by Fingal County Council so that each of the goals can be achieved, and that various groups are assisted in being directed to agencies who can best support them. See section 9.4
- Expert advice should be provided to various food industry clusters, committees, etc. to help structure volunteer groups correctly and prevent fatigue and frustration
- Inter-agency collaboration needs to support the implementation phase at the request of industry stakeholders (where the initiative is eligible for support)



8.4. Contract Food Project Manager

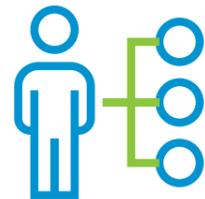
It is recommended that in order to enable the implementation phase of the strategy, that a food project manager should be put into place on a **contract** basis for a minimum of 12 months to support the implementation. (This role could be tendered to an external resource).

The role of the food project manager will be as follows:

- To drive the strategy action implementation through others
- To act as a conduit for action and activity in the food sector in Fingal
- To ensure quarterly strategy steering group meetings occur and follow up actions are implemented
- To provide the steering group with updates on progress in accordance with the timescales set out in the strategy
- To facilitate the operation of sub groups within the steering group who will drive individual projects
- To liaise with all food agencies re their involvement in the strategy implementation
- To support food stakeholder volunteers running events with information, advice
- To liaise with local food groups
- Be expert at funding sources and communicate this information to relevant stakeholders
- To report to Fingal County Council/LEO and keep them informed of progress.
- Act as a source of knowledge and a referral point for mentor supports, training etc. provided by LEO, LEADER, Bord Bia and other agencies linked to food
- Be seen as the “go to” person for food in the region and command the respect of the stakeholders

The role of the food project manager will not include the following:

- Taking workloads from others, which should be done by them
- Acting as a mentor for food businesses
- Full time Administrative capacity



9. Strategic Goals

The following goals and actions have been created to guide the initial priorities over the first 3 years of the strategy. It is recommended that that a review at 12 months and 24 months be conducted with the steering group, to amend/enhance the strategy based on industry feedback and appropriateness of each goal/action at that review point.

Goal 1: To foster greater collaboration and clustering between stakeholders

Rationale:

Fingal has significant strengths in its food product range, its food story, the knowledge base of its stakeholders and the number/size of businesses within the region. Increased collaboration will capitalise further on these strengths and the objective of this goal is to create an industry driven initiative for the region through greater stakeholder collaboration.

Actions:

- Facilitate the local industry to come together to form cluster groups to address food industry issues and opportunities. Explore clustering and collaboration under some of the following headings:
 - o Developing export market/import substitution opportunities
 - o Collective lobbying and advocacy
 - o Industrial relations
 - o Public relations
 - o National food events
 - o Corporate Social Responsibility (CSR)
 - o Circular Economy – Sustainability
- Set up a Fingal food cluster buying group with the key remit of reducing cost inputs significantly e.g. insurance, packaging
- Establish peer to peer learning groups (topic specific forums for sharing industry best practice)
- Set up a number of sector specific WhatsApp Cluster Groups to facilitate knowledge transfer (technology to transfer information)
- Create an online directory of Fingal food producers, growers and farmers to be used by foodservice operators etc. to facilitate improved collaboration at commercial level within the region
- Once confidence is established between stakeholders, facilitate the establishment of a cluster for big company/small company mentoring (those with expertise sharing it with others on a 1:1 basis)
- To provide contacts introductions and other supports for producers wishing to access other distribution channels, to complement the work done and success of the Food Academy project.

Goal 2: To be viewed as the proactive food innovation leaders

Rationale:

For many years, Fingal has led the product innovation landscape with new ideas and diversification. The strategy recommends further enhancing of the innovation calendar to leverage on this strength and is also in line with the Food Wise 2025 national strategy. (it should be borne in mind that most of the small to medium producers have minimal access to structured innovation supports)

Actions:

- Provide access to specialist “Innovation Super Mentors” on a subsidised basis e.g. product developers, nutritionists etc. (Improve access to experts)
- Explore larger Fingal based companies who are willing to share their Research & Development facilities or expertise with smaller companies. This might take a number of forms:
 1. One off “innovation talks” given by larger producers to those seeking support
 2. A “big brother/little brother” structured relationship between large and small/medium producers to conduct a specific project. Confidentiality agreements
 3. Simple sharing of product development facilities by larger companies with small/medium producers. Short duration projects envisaged to start
 4. Simple sharing of product development, staff expertise between those who have them and those in need. Short duration talks and interactions envisaged to start.
- Set up a Fingal food innovation cluster to identify enablers which will facilitate improved innovation and partner with appropriate agencies to lead the process
- Conduct a needs analysis on the requirement for an incubation kitchen (for emerging producers) in the County

Goal 3: To improve business management performance**Rationale:**

Businesses throughout the region have varying strengths of management skillset. In line with Food Wise 2025, this goal sets out to provide additional supports for those businesses requiring it to strengthen their management teams, which in turn will support more successful businesses.

This goal does not attempt to replicate any existing supports provided by other agencies, but rather to encourage a greater upskilling at senior level.

Actions:

- Implement the appropriate recommendations arising from the Fingal Skills Strategy
- Conduct a needs analysis on where the business skillset gaps appear.
- The possible types of support which might be highlighted in the TNA are as follows:
 - o Access to third level degree programmes for business owners (build stronger business owners)
 - o Business management upskilling programme from middle management in partnership with DIT/IT Blanchardstown (build stronger management teams)
 - o Technical upskilling
 - o Food marketing skill development
 - o International food and beverage selling expertise
 - o Food tourism operator upskilling

Goal 4: Support the attraction and retention of food talent into the Fingal region**Rationale:**

In response to industry challenges on attraction and retention of staff in the Fingal region, and in line with Food Wise 2025 focus on “Human Capital”, it is recommended that additional quick initiatives be put into place which are designed to improve the attraction and retention of staff in the Fingal food sector. This goal covers growers, processors, producers and extends into the foodservice sector.

Actions:

- Develop a calendar of talks/information sessions in further education centres and colleges highlighting Fingal food job/careers opportunities (back this up with online communication tools)
- Increase the number of DIT/UCD/other third level institutes student interns in Fingal food companies by forming closer links with these colleges so that student allocation can be prioritised for the Fingal region ahead of other parts of the country
- Work with local educational providers to ensure where provision is adequate to meet industry needs, that new programmes are created. (The Boyne Valley region have just created a new Food Tourism programme in partnership with DKIT. This is a first of its kind in Ireland)

Goal 5: To create a Fingal food and drink tourism destination**Rationale:**

This goal focuses on the foodservice and tourism industry. The rationale for this goal is to provide an enhanced consumer/tourist experience for the region and help its towns and villages achieve destination status.

The SWOT analysis has already identified the credibility many of the towns in the Fingal region have achieved, by being short-listed in the Foodie Destinations competition. This goal aims to leverage this further.

Actions:

- Facilitate the creation of a foodservice leadership cluster, representative of all key towns and villages. This leadership cluster could be modelled on similar work undertaken in the Donegal or Wexford regions. The objective is to ensure that a coordinated plan is executed for the full foodservice sector within the region and allow a greater growth of food in tourism
- One of the colleges that focuses on culinary skills and tourism could be an appropriate partner to facilitate this cluster
- Conduct a feasibility study to create a local supply chain solution to facilitate ease of ordering and distribution Fingal grown and produced foods. This could potentially be facilitated by an existing Fingal food distributor
- Establish a new project called Fingal Food Trail, which will provide an excellent opportunity to promote Fingal farmers and food producers. The objective of this project is to drive business to the rural villages of Fingal, to farms and artisan food producers currently not accessible to the food tourist
- Establish a calendar of local food experiences (similar to The Boyne Valley Food Series)
 - o Cookery classes, craft beer tasting, tasting menus,
 - o Unique dining experiences (chef’s table), filleting and food skills,
 - o Romantic breaks, afternoon tea in a castle with local food etc

- Host a number of pop up restaurants in Fingal's Heritage Properties featuring up and coming young chefs
- Run half day and full day food courses along the themes of Farm to Fork and (Lobster) Pot to Pot which will include such activities as catch and cook your own fish, learn how to make Irish soda bread, shop the farmers market and create a dish from local produce
- Develop a Fingal Food Directory (soft and hard copy) An information guide & reference source of products and services for the food & drink producers and retailers in Fingal which would be circulated to managing directors, financial controllers, production & purchasing managers, restaurateurs/ chefs and marketing managers in the major sectors of the food and drink manufacturing and processing industries in Fingal and ultimately in Ireland
- Build relationships between food producers and chefs/foodservice operators, examples might include
 - o Hosting a series of talks and events targeted at both stake holder groups to facilitate relationship building (a Fáilte Ireland food in tourism talk would be an example)
 - o Host a Fingal producer showcase and invite all chefs in the region to meet the producers

Goal 6: To explore the establishment of a physical Agri-Food hub to support clustering and collaboration

Goal 6 above is achievable without physical infrastructure, and can be commenced immediately. Other regions in Ireland and internationally have enhanced their collaboration through the provision of R&D facilities/centres of excellence including the following aspects:

- Fully equipped product development kitchen facilities (with a food technologist on site)
- Fully equipped food testing laboratory
- Pilot plant - clean room type open space for full scale production trials
- Fully equipped meeting rooms

A feasibility study should be undertaken to determine if a hub like this would be viable, the makeup of this hub, and the demand for same. A hub like this could help the Fingal food community to differentiate itself further and this assumption needs to be tested.

The feasibility study should explore the following:

- The demand for a physical Fingal Hub model
- The feasibility of constructing the facility and identifying where it should be located
- The infrastructure costs involved and how these will be funded
- The on-going costs and how these will be funded
- The management structure for such a facility
- To establish that demand exists



Conclusion

Fingal County is unique within the Irish food landscape. The number of large growers and producers, the mix of small to medium producers and it's proximity to the largest concentration of food consumers in the country, has created a unique dynamic.

The knowledge base among food business stakeholders surpasses most regions and this strategy concludes that greater collaboration and clustering within the region will help to further enhance the success of its stakeholders.

Knowledge transfer and greater collaboration between stakeholders will need to underpin the strategy and this could eventually lead to the creation of a physical innovation hub which would facilitate even higher levels of product innovation and greater efficiencies for stakeholders within the region.

The food tourism sector in Fingal is equally well placed to capitalise on growing consumer interest in experiential dining with the provenance of its ingredients as a central message.

Achievement of the strategic goals will rely on genuine industry support and its execution will need a high level of voluntary support from the stakeholders in the region.

Comhairle Contae
Fhine Gall
Fingal County
Council



Oifig Fiontair Áitiúil
Local Enterprise Office

