



Donegal Food Strategy

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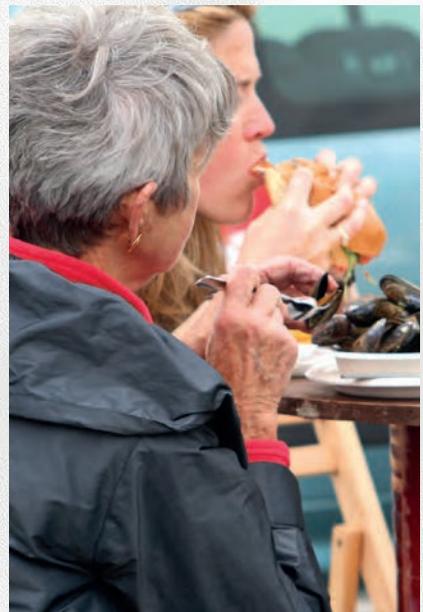
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Donegal's Good Food Initiative

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1. Introduction

The following document sets out a food strategy for Donegal County which covers the next five years and has been created to provide vision and direction to all stakeholders involved in food within the county.

Background

In 2009 a group of stakeholders, led by Donegal County Enterprise Board commenced a programme to start promoting the food agenda within the county under the "Food Coast" brand. The wider group involved in these initiatives included a collection of:

- Local state agencies
- Food producers
- Restaurants
- Hotels

Over the following two and a half years there was a busy agenda of activities including:

- Two start your own food business programmes
- The development of a seafood business programme
- A workshop on food branding
- A Harvest Feast event
- Initiatives where restaurants and hotels combined to run consumer food events
- Several food focused festivals and events

- Visits to trade shows by food producers
- A best practice visit to London
- Grant aid approval (Donegal CEB) for 14 food businesses
- Mentoring support (Donegal CEB) to 29 food businesses

In February 2012, following an internal review of the Food Coast initiative, Donegal Enterprise Board commissioned James Burke and Associates to conduct a review of food activities within the county and to develop a strategy for food. The key objectives of this project are:

- *To facilitate and develop a cohesive group of relevant stakeholders focused on the delivery of an innovative strategy for the Food Coast*
- *To produce a focused, innovative, action based strategy for the Food Coast*

Methodology

The strategy formation was divided into a number of distinct phases:

1. Desk research to look at food initiatives in other counties and countries.
2. Focus groups with stakeholder interest groupings.
3. Individual face to face interviews
4. Telephone interviews
5. Strategy formation

2. Irish Food Background

There are over 800 food firms in Ireland. Food in Ireland has taken on a far higher profile role in recent years. Irish food and drinks exports rose by 12% during 2011 reaching an all-time high figure of €8.8 billion. These food and drink exports increased at 3 times the rate of total merchandise during that period (Source: Bord Bia) Food and drink exports have risen by 25% during 2010 and 2011.

The production of speciality food in Ireland accounts for approx. €500m pa from a base of 350 producers. (Source: Teagasc) According to projections from the TASTE Council, by 2020 the existing base of artisan and speciality food firms could double their output at consumer prices and increase their market share of the local market from 3% to 6% resulting in 1000 new jobs created and this would circulate €2.1 billion into the local economy per annum (through a multiplier effect explained below).

The TASTE Council also suggest that during the next 10 years 650 new food entrepreneurs could establish business resulting in 6500 new jobs created.

A study by the new economics foundation in London found that every €10 spent with a local food business is worth €25 to the local economy, which further supports the rationale for creating a vibrant local food economy.

Tourists spent close to €2 billion on food and drink in Ireland in 2009. Overseas visitors account for 60% of the total, spending an estimated €1.2 billion on food and drink. (Source: Failte Ireland)

Tourism Ireland research suggests that a “variety of good food” is an important factor for tourists in considering Ireland as a holiday destination, with 57% of visitors citing this factor

The seafood industry, of which Donegal is a key part, contributes about €700m annually to the national economy and employs 11,000 people. Approx. €340m of this product is sold on the domestic market with the remainder being exported (Source: BIM)



3. Key Learning's from Focus Groups and Interviews

During the formulation of the strategy over 50 individuals were either interviewed face to face, or as part of focus groups. The main messages from these interviews were:

- **Recent food activity:** There was a general acceptance that the food activity in Donegal over the last two years was welcome and had generated a step change compared to the era pre Food Coast initiatives.
- **Artisan Producers:** There was a view among interviewees that the county was well behind many other regions in terms of the number of artisan and speciality producers it currently had.
- **Start-Up Food Producers:** There was also a consensus that the number of food start-ups seemed lower than other regions also.
- **Consumer food Culture:** There was broad acceptance from both retailers and foodservice interviewees that Donegal consumers were at an earlier stage of evolution in their acceptance of artisan and speciality food. There was recognition that this was slowly changing but also acknowledgement that Donegal consumers were at an earlier stage of development with regards to food culture. This cultural evolution was also given as a possible reason for the slower growth of farmers markets within the county.
- **Distribution/Logistics:** From a food producer perspective, distribution was highlighted repeatedly as being a challenge for producers, both within the county and also to get to other centres of population, in particular Dublin. This was viewed as a barrier to growth of existing food businesses.

- **Food PR:** Almost all interviewees felt that Donegal had historically lacked PR in connection with its food stories. Some respondents linked this to the early stage development of food within the county while others blamed the remote location as a contributing factor (it is acknowledged that a number of establishments within the county have attracted strong national media coverage.)

- **Strong Natural Assets:** When questioned as to which food types Donegal was most famous for, potatoes and seafood were highlighted by almost every single respondent.

- **Awareness of Food Producers:** The level of awareness of food producers within the county among retailers and foodservice operators is extremely low and somewhat confused. There was a small core number of chefs and store managers who clearly knew most of the producers, however the majority of respondents could only name a small number of the higher profile local food products. This was more pronounced in larger foodservice and retail establishments and information on local fruit and vegetable suppliers was exceptionally low.

- **Food Coast Brand:** There was widespread confusion of what the food coast brand is, and could be, including:

- A vitally important marketing tool
- A brand of quality only
- A brand of origin only
- A brand that was disbanded twelve months ago
- A brand more suitable for the tourist sector
- A brand more suitable for food producers
- Not a brand at all

Outside of the core group who were involved in its creation, the brand was very unclear and there was no commonality in views on its potential use going forward.

- **Stakeholder Communication:** Several interviewees felt that communication about the Food Coast and its activities was problematic. There had been a high level of communication in the early months of its creation and then communication among the stakeholder groups gradually slowed and some felt that they had not heard directly from the Food Coast group in over a year.

- **Strategy Formation:** There was a strong reaction from interviewees to requests to participate in interviews and there is general goodwill within the county to the formation of a food strategy. Contributions to the consultation process were exceptionally high and there is a sense that there is a general eagerness to participate in, and support a cohesive strategy.

- **What the Strategy Should Cover:** Respondents from the following stakeholder groups were asked to identify where they felt most energy and resources should be put into in the strategy formation:

- Primary Producers
- Secondary producers
- Large producers
- Small producers
- Restaurants
- Hotels
- Cookery schools
- Culinary Colleges
- Farmers
- Fishermen
- Consumer education
- Student education

While there were a plethora of options suggested, there was an evenly divided view between focusing the strategy and resources solely around the producer group, or alternatively creating a wider strategy for

all stakeholder groups and moving all of these together at the same pace.

- **Other Regional Benchmarks:** Mention of Cork County came up at almost every interview as a benchmark in terms of the number of producers it has, food evolution within the county, the number of culinary establishments etc. In particular Kinsale was mentioned in over 50% of the interviews as an example of what could be achieved.

- **Self-Starters:** There are a small number of food enthusiasts within the county who could be described as self-starters when it comes to promoting food within the county and promoting their own businesses. There are innovative examples of hotels and restaurants coming together to create showcase events and other examples of food destinations within the county, driven by enthusiastic entrepreneurs.

These are the exception, rather than the norm and the larger proportion of interviewees, while highly supportive of a broader vision for food in the county, do not have the skill sets at this point to be self-starters. This group openly welcomed the idea of being educated and guided on what role they need to play to make Donegal famous for food. Many chefs in larger establishments simply do not understand the marketing role and unique point of difference that can be gained for their business by supporting local producers.

- **Cost of Local Food:** Many of the respondents from the foodservice sector mentioned cost price almost immediately when local food sourcing was raised. There is significant margin pressure for many of these establishments and some felt local producers did not understand the commercial model and were losing business because of this.

- **Provenance:** There are a small number of retail and foodservice operators within the

county who are doing great work on creating the direct link from the product/menu directly back to the producer/grower. The majority of retailers and foodservice operators are failing to create this linkage. Even some establishments who have strong provenance links, are failing to communicate these directly to the consumer.

- **Barriers to Start-Up:** There was repeated mention of food safety barriers and bureaucracy as being the key blockages to business start-ups. This is unusual in that it is not the major issue it once was in most other regions around the country and is either a misconception or a phenomenon unique to Donegal. It should be noted that the majority of these comments came from people within the food industry but who were not producers themselves, but who claimed to have received this feedback from producers.

The other major contributing barrier which was identified by respondents, was that of confusion when a person decides to start a food business in terms of who do they approach and what singular point of information is available (the printed resource book for start-up food businesses was acknowledged but outside of the agencies the majority of the other stakeholders did not seem to be aware of this.)

- **Food Trails:** There were several calls for the establishment of a food trail within the county which would encompass producers, foodservice operators and retailers.
- **Food Export:** Several of the respondents pointed out that the majority of producers who wished to grow would need to rely on the export market as well as the domestic market. Many respondents pointed to Northern Ireland, which to some degree, is forgotten as a first step export market.

- **LYIT (Letterkenny Institute of Technology)**

Utilisation: There was some awareness among the respondents of LYIT's Culinary Programme but also a lack of clarity in terms of the full benefits stakeholders could be getting from this facility. Several respondents felt that LYIT was underutilised as part of food development within the county.

- **Food Incubation Units/ Community**

Kitchen: Concern was expressed by a number of respondents about a number of empty food incubation units within the county and the critical need to have these existing facilities incorporated within the overall strategy.

- **Access to Local Seafood:** Seafood was quoted as an example of a product which was difficult to access locally and one responded, "tongue in cheek" said it was possible for Donegal fish to be sent to Dublin for processing and to come back again to be sold to restaurants. One of the big barriers to local sourcing cited by a number of respondents was the convenience of dealing with the large national operators Pallas foods, Musgrave Foodservice etc. It was simply more convenient to ring these organisations than it was to try and source local food.

- **Conflict:** There was a view which was aired on several occasions that an impasse had occurred with current food development within the county. This was attributed to apparent opposing needs of different stakeholders and this has been the cause of disillusion among some stakeholders.

- **Enterprise Board:** The only agency proactively mentioned during the research was the Enterprise Board, and this was the only agency which was connected with the Food Coast Initiative. If the interviewer had not been aware of other agency support and involvement for food development this would not have been forthcoming from respondents.

- **Food Festivals:** The ever increasing number of food festivals was viewed as positive by all respondents as it is a key way of improving the consumer interest in local food. The strategy of inviting national artisan producers from other regions into Donegal for these events was also viewed as positive as it was felt it would act as a stimulus for other people to start food businesses.
- **Category Gaps:** While there were all sorts of suggestions for products which could be produced in Donegal, cheese was repeatedly raised as an obvious opportunity area both at artisan level and at larger commercial cheddar level (a gap analysis would need to be conducted before either of these two product types could be viewed as commercially viable).
- **Large Multiple Supermarkets:** This group was viewed as “the enemy” and a threat to local food production by the non-producer respondents as it was felt that multiple supermarkets do not stock local products and bring in much cheaper alternatives (this is not factually correct and most respondents were unaware of the regional listing policies all of the multiple supermarkets now have in place).
- **Food Producer Group:** There is no food producer group within the county but rather a wider Food Coast group which involves foodservice and food tourism stakeholders as well. Some respondents felt that the absence of a dedicated food producer group (who have totally different needs) was a weakness within the county.



4. Desk Research Findings

As part of the strategy preparation desk research was carried out to identify how Donegal compares to other parts of the country with regard to food production and to identify national and international best practice in the area of food development and support. The key findings were:

- **Large versus Small Producers:** A census of producers within the county was conducted to try and establish producer numbers. The data was created from all publically available information, and can be viewed only as a snapshot of the market.

Ironically, while there is a general consensus that there are not enough artisan/added value producers in the county, there are 93 producers in total within the county boundaries which is larger than that assumed by most interviewees. This group of 93 producers breaks down as follows in Fig 1:

FIGURE 1

Producer Category	Number of Producers April 2012
Seafood	44
Growers e.g. veg	9
Bakery	8
Meat	6
Artisan/added value e.g. jams etc.	6
Dairy	5
Beverage	3
Other e.g. Farm shops, eggs etc.	12
Total	93

Of this group of 93 producers, 40% are seafood related. The majority of these seafood processors tend to be large scale, do not supply the local market in a substantial way and are often export oriented. To some degree they tend to be “invisible” to the local community. This may contribute to the perception that there are very few food producers in the county.

- **Population Ratio:** In order to access the ratio of producers to the population of the county, comparisons were made with the producer community in Cork, as it was often referenced by interviewees as a benchmark region. Fig 2. shows the population of both counties and clearly highlights the sheer scale of difference. Logically, this population difference implies that Donegal will have less food producers than Cork.

FIGURE 2

County	Population
Cork	518,128
Donegal	160,927

In order to help understand the number of producers per head of population, a ratio was created. The only large database of producers in both counties which could be used is that of Bord Bia (an assumption was made that the selection process used by Bord Bia in both counties is consistent). Fig 3. shows the ratio of producers to population numbers using the Bord Bia data:

FIGURE 3

County	Ratio Producers: Head of Population
Cork	1:3632
Donegal	1:4877

In Cork there is one producer for every 3,632 people in the county. For Donegal there is one producer for every 4,877 people. If Donegal were to improve its ratio in line with Cork, then 11 new producers would be needed immediately.

This however only brings the ratio in line with Cork and the massive difference in population, in theory, will always mean that Cork will have 3 times more producers than Donegal simply because of population difference.

The number of producers in any region is always a critical factor in determining its food presence and reputation. The conclusion is that Donegal is hampered to some degree by its small population size and the county will have to work harder than other regions to increase its ratios above average to leverage commercial sales, job creation and reputation on the national stage. Smart marketing will help to overcome shortfalls in numbers also.

While comprehensive restaurant numbers for ratio comparisons are not readily available, the same challenge will potentially apply in terms of numbers of restaurants, however smart marketing will be critical for this sector also.

- **County Based Food Events:** Other regions were quoted regularly by interviewees as examples of active local calendars. The Tipperary Food Producers group are a good example of a regional group with a strong annual calendar of local events which are targeted at the consumer. Ref: www.tipperaryfoodproducers.com. Examples:

- Long table dinner
- Food Cookery evenings
- Food Festivals
- Online Food Producer directory
- Food Connect School Programme

- **Food Producer Directories:** The Cork Food Finder is a good example of a hard copy publication which has a sector by sector breakdown of all producers within the county across the following sectors:

- Smoked Foods
- Seafood
- Produce
- Preserves
- Prepared Foods
- Poultry and eggs
- Organic
- Meats
- Dairy
- Bakery

The Westmeath Food Network is another example of a good online producer website and directory. Ref: www.westmeathfood.ie.

- **Regional Food Brands:** www.tastekerry.com is an example of a regional food brand in the early stage of development.

www.fuchsiabrands.com is a long established brand which crosses many sectors from accommodation through to food.

In the UK the following regional food brands are good examples:

- www.tastesofanglia.com
- www.tastenortheast.co.uk

It should be noted that the research would indicate that regional food branding is only one element of a successful food strategy (and is very often more important for restaurants and hotels). Producer education is the biggest single factor in determining a successful group.

Bord Bia research conducted during 2011 suggests that the three factors consumers looked for most when making a decision on what producers products to buy were:

- Who produced it?
- Where did they come from?
- What is the story behind the product?

The provenance story was viewed as a critical element in the communication process.

- **Commercial Buyer Events:** There are several examples of regional buyer events around the country to showcase products from a particular county or a particular region, which are generating commercial success for the region. In many cases the buyers are brought into the region. Examples:

- The South East Regional Showcase Network Event April 2012
- The Cork Food Forum annual event
- The Bord Bia Regional Showcase Events (these events are commercial events targeted at trade buyers and not public consumers).

- **Food Festivals:** There are several examples of regional food festivals which have moved to have a national presence:

- Waterford Festival of Food
- Savour Kilkenny
- Middleton Food Festival

The effect of these festivals is to promote the town, county or region as a food destination on the national map.

- **Food Incubation Units and Community Kitchens:** There is an array of food incubation units and community kitchens both nationally and internationally. Previous research conducted by JB&A towards the end of 2011 indicated that these initiatives are only possible with extensive producer training, mentoring and expert advice being provided to the tenants on a continuous basis. The building of units on a standalone basis without being integrated into an overall food strategy for a region has a high probability of failure. Examples of food

national/international incubation units and community kitchens are :

- www.northtippfoodworks.ie
- www.shropshirefoodcentre.co.uk (highly successful UK venture)
- www.startingblock.biz (USA)
- www.foodinnovation.rutgers.edu (USA)

- **Regional Food Magazines:** There are many good magazines which are targeted at consumers with the objective of raising the awareness of regional food in the public arena. Some are online and some are traditional print copies. Examples are:

- The Jellied Eel magazine
- Flavour Southwest magazine
- Flavour London magazine

- **One Stop Shop:** There are several examples in the UK of food agencies who act as a one stop shop for producers from start up through to growing their businesses. The strongest example of these is Heart of England Fine Foods (Ref: www.heff.co.uk). The range of services they offer is enormous and covers the following:

- Gap analysis and identification of growth areas
- Identifying distribution solutions
- Affordable hygiene and food safety standard (which is mandatory for all businesses before they become part of HEFF).
- Press agency working on behalf of the producers
- Research and information service
- A HEFF trading desk which pro-actively sells producers products to independent retailers.
- The publication of local member food guide.
- Meet the buyer events within the region (National buyers invited into the region).
- Networking events

- Each producer has a dedicated account manager within HEFF.
- Other regional food networks which can act as reference points are:
- www.bordersfoodnetwork.co.uk/about_us.html
- www.dpi.qld.gov.au/16_11747.htm (Australia)

• **Regional Distribution:** JB&A has conducted significant research over the last five years on regional distribution hubs especially in the UK and Irish markets. Many have made a strong start but then declined over time and the strongest live case study is the ASDA local sourcing initiative which started initially with Plumgarths in Cumbria. They have now rolled this hub model into fourteen other regions around the UK with over 3000 regional products. An opportunity may exist in Donegal to partner with one of the large multiple retailers using this ASDA/Plumgarth model.

There are tentative plans to develop an E-Marketplace Food Hub in London which will act as an online matching agency between food producers and the foodservice sector.

- **Recipe and Restaurant Linkage:** Several food producer groups have formed links with restaurants to promote seasonal products which aims to inspire menu ideas with the restaurants. An example of this is www.visit-hamshire.co.uk (seasonal products).
- **Links with Agriculture:** There are strong links with agriculture, especially in the UK as part of regional food strategies. Farm walks, farm talks and open days are all examples of events that are targeted at consumers to increase their linkage with rural farming communities. "Visit our farm on lambing day" is typical of the type of events which are run. Ref: www.deliciouslyyorkshire.co.uk

• **Niche Events:** Some regions run focused niche events in order to attract a core group of food enthusiasts to this. An example of this is run by: www.tasteofanglia.com where they run the Veg Fest UK Festival attracting vegetarian producers and consumers from all over the country (these events often double as trade events for buyers.)

- **Starter Packs:** Some food networks provide starter packs for producers e.g.
 - Business Cards
 - Letterheads
 - Compliment slips
 - Flyers
 - Logo Design work.

This is an invaluable start up support and removes what is often a traumatic milestone for producers. An example of this service is Ref: www.tastenortheast.co.uk.

• **Online Regional Support Sales:** There are examples of groups of producers within a region having products sold online through one single website. A good example is Ref: shop.heff.co.uk.

- **Student Involvement:** There are also examples of where students are being educated about artisan food/local food and in some instances the students are tasked with running food festivals. Some examples of student initiatives are:
 - The Tipperary Food Connect Project
 - Edinburgh's Food Feast. Ref: www.local.stv.tv/edinburgh/news/36965-final-line-up-announced-for-feast-2012/
 - Student Led Food Festival Ref: www.scotsman.com/edinburgh-evening-news/edinburgh/gifted-chefs-to-showcase-scottish-fare-at-student-led-food-festival-1-22244888

- **Producer Guides:** There are an array of producer guides providing information on topics ranging from start up right through to getting listings with retailers and foodservice operators. Bord Bia's Vantage site provides a comprehensive online resource for producers. Ref: www.bordbiavantage.ie
- **Government Local Sourcing:** Several pilot projects have taken place in the UK where state facilities such as hospitals etc. have run local sourcing initiatives. One such example which has received positive reviews is that of Kent Hospital which claimed to have saved significant amount of money while at the same time increasing the amount of its local sourcing. Ref: www.soilassociation.org
- **Buy Direct From Local Farmers:** Globally there are several different examples of farmer to consumer direct online models which encourage consumers to buy produce, meat etc. from local farmers. Examples below:
 - www.farmigo.com
 - www.bigbarn.co.uk (which also allows producers to trade home grown produce)
 - www.foodoro.com (buy and sell gourmet food)
 - www.foodzie.com (an online tasting club where the customer pays \$30 per month and receives a free tasting box of artisan foods.)



5. Donegal Strategy

Core Assumption

The strategy formulation is based on a core assumption that without a strong food producer base, the county will never be famous for food.

All other work streams undertaken by restaurants, hotels, retailers and tourism stakeholders will potentially always be weakened if the producer base is not robust and large enough.

In summary, the core assumption that will drive the strategy is that a strong base of artisan/ added value and mainstream food producers, backed up by a continuous flow of new start up food businesses, will drive all other food related stakeholders within the county.

6. The Vision

The vision for the Donegal food strategy is...

“By working collectively, to make Donegal famous for food and recognised as a pioneering region for its approach to fostering and growing new start-up and existing food businesses”.



7. Strategic Priorities

It is proposed that the Donegal food strategy be based on eight strategic priorities:

1. The strategy will be based over a **five year period** and have a medium term outlook (as opposed to a short term fix).
2. The initial priority will be to dramatically **increase the amount of new food start-ups** within the county through both artisan and added value food start up producers (year 1 and 2) Producers are defined as primary and secondary producers.
3. The **sales revenue and profitability of the existing producer** base will be grown in year 1 and 2.
4. Year one priorities for restaurants, hotels, retailers and other foodservice operators within the county will be to increase opportunities within their businesses to **source locally produced ingredients** at competitive prices (competitive = Product quality/provenance versus price.)
5. A **food co-ordinator** will be appointed for the county for 3 years to drive the strategy implementation. The food co-ordinator will be viewed as a catalyst for change and will motivate the various agencies and stakeholders to implement nominated actions (they will “co-ordinate and motivate” rather than try to achieve everything themselves).
6. Financial supports from **all agencies will be aligned** to follow the strategic priorities.
7. **Consumer education** and marketing Donegal as a food region will become a priority from year 2 to 5.
8. The Food Coast brand will be a **brand of origin only** in its initial use. (It may be possible to develop it into a wider brand with other uses but only after several years) The use of the Food Coast brand will in a limited way in year one. It will re- emerge in year 2 as a strengthened brand of origin and provenance to be used by the producers, food tourism initiatives, foodservice operators and retailers. (The proposed criteria for using the Food Coast brand are contained in a separate document.)



8. Strategic Objectives

The strategic objectives which will be used to measure progress over the five years are defined as follows:

1. To increase direct employment through developing 5 new start-up businesses per year over the five year period. (25 new start-up businesses employing 2 people each)
2. To increase revenues of existing producers by 20% within the five year period.
3. To make Donegal famous for food.
4. To increase revenues of restaurants and foodservice operators focused on the consumer market, by 15% over the five year period
5. To be regarded nationally as a region of excellence for the strategic development of food.



9. Strategic Priorities

The recommended actions within the strategy have been broken into a number of strategic priorities. Within each section the proposed actions are segregated into essential actions (“High Priority”) which should be viewed as mandatory and should be prioritised, and “Desirable” actions which need to be completed but could move at a slower pace. Only the “High Priority” actions are shown in the body of the document and the “Desirable Actions” are outlined in Appendix 1.

An action plan showing timescales, budgets and who is responsible for each action has also been completed.

9.1 PRIORITY ONE Put Enablers in Place

For the strategy to succeed, a number of enablers will need to be in place.

HIGH PRIORITY

1. A new steering group for the Donegal food strategy to be appointed, drawn from the following the channels:
 - a. Primary producers
 - b. Secondary producers
 - c. Large scale producers
 - d. Farmers
 - e. Fishermen
 - f. Representative agencies – BIM, BB, Teagasc, EI, CEB
 - g. Retailers
 - h. Foodservice operators
 - i. LYIT
 - j. Food tourism/hotel representative

2. A large scale fund of €500,000 is to be created over the five year period.
3. A food co-ordinator will need to be appointed to co-ordinate all of the work streams within the strategy. (This person will require an admin back up)
4. A national “Food Ambassador” will be recruited for Donegal whose role will be to promote food from within Donegal at national and international level and advise in the delivery of the strategy.
5. A quarterly newsletter/magazine will be produced and circulated to all industry stakeholders for year one. (The format of this may change from year two onwards to more of a consumer publication).
6. An inter-agency funding strategy is to be agreed so that all available funds designated for food development are maximised. Obviously applications for funds will be made in the normal manner by the relevant applicants; however clarity between the agencies on “who is focusing on what” will greatly assist the progression of the strategy.

9.2 PRIORITY TWO Increase the amount of new food start-ups

The following initiatives will be used to increase the numbers of new food producer start-ups to 5 per year:

HIGH PRIORITY

1. The current “start your own food business programme” to be revised to focus on food producers only and should become a specialist food producer programme as opposed to a generalist food start up programme. This programme should be run twice yearly with a target of ten candidates on each programme.

2. A market gap analysis should be provided to all start-up businesses before they commence their business to allow new producers full clarity, on the restrictions or opportunities, for the categories they are proposing to enter. It will also stimulate new directional thought processes.
3. Any emerging new producer should be referred to an expert food mentor contracted to that agency. Each agency will be familiar with the services offered by all others and will ensure that mentee's are referred to the most suitable mentor for their needs regardless of the agency.
4. A "Big Brother" network of (15) "sector mentors" will be created. These sector mentors will agree to give two hours of their time per month and will "adopt" a start-up producer each. This sector mentor panel will be made up of volunteers from the following channels:
 - Chefs
 - Retailer owner managers
 - Existing established producers

As well as producers having six months access to the food mentor, each start up producer would also have two hours access to be used either wholly with one sector mentor or split between two different ones. Sector mentors would receive training on how to mentor and would be required to complete a short summary of the advice they had given the producer.

5. The creation of "a one stop shop for food" within the existing CEB website which would act as a resource for information on funding and as a referral site to other online sources of information for any member of the public thinking about starting their own food business (referrals to expert online resources like the Bord Bia vantage site

will be included in this site). All other state agency websites in the county would link to this site also.

6. A local PR campaign will be developed to be run in conjunction with media partners to promote food start-ups.
7. Using the opportunity gaps highlighted in gap analysis above, specialist product training days within the county with a narrow focus (target participants for each training day is 5 e.g. how to make blue cheese, etc.)

9.3 PRIORITY THREE

Growing Turnover and Profitability of Existing Producers

These work streams will accommodate primary and secondary producers, and have as an overriding objective a 20% sales growth for existing producers over 5 years. The actions to support this key priority are as follows:

HIGH PRIORITY

1. Support and advice on how to grow business/ scale up should be provided to all existing producers wishing to expand.
2. A training needs assessment will be conducted on all existing small and medium producers to identify commercial opportunities and training needs for each one.
3. A producer development programme will be run in year one and year two (target participants 15 each year). It is envisaged that this programme would be partnered with one of the national retail or foodservice operators who would provide some of their management team to help educate producers.
4. A customised meet the buyer event will be run each year for year one and two which would introduce three national buyers

each year to an array of suitable Donegal producers. Because of geographical challenges, it may be more suitable for the group to hold this event in Dublin. This is a narrow focus high potential trade event.

5. For the high potential producers who are currently exporting, or are ready to export, four international large scale buyers would be hosted on a visit to the county on a carefully preselected series of visits, agreed with the buyer in advance, targeting categories where the buyer has identified real opportunities. Potential target buyers could be large scale UK or French retailers like Sainsbury's or Auchan or foodservice operators from across Europe. These events would need to be run in partnership with other agencies like EI/Bord Bia/BIM, etc.
6. On-going mentoring, based on the training needs assessment, should be provided to existing producers for a period of 6 months where required.
7. A programme to help 5 additional producers within the county achieve BRC accreditation should be put into place. This programme will take approximately 9 months to complete. The objective is to help a greater number of producers to achieve a higher standard which will make their export readiness stronger.
8. A Donegal Food Producer Network should be established and run by the producers in a self-sufficient way
9. A database of all foodservice and retail buyers within the county will be produced.
10. A food producer directory will be made available on line and in hard copy to all chefs and retail buyers.
11. A mini 2 page directory of distributors and their specialist areas to be circulated to all chefs and retailers within the county.
12. A meet the maker/meet the buyer local networking event should be run at a central location within the county as a way of introducing perspective local buyers and producers together. It is envisaged that primary and secondary producers would attend this event. A target of 40 local chefs and retail store owner/managers should be used for the event, with the maximum number of producers who have product for sale within the county.
13. A full day workshop is to be repeated twice throughout the year for chefs on tips and suggestions on how they can exploit locally sourced produce in their sales and marketing initiatives and also how these products can enhance margin and profitability.

The workshop title could be "How to increase sales and profit by harnessing locally produced food". It is envisaged that an international expert in this area would provide an expert talk on a real case study for part of this workshop. The overall workshop objective would be based on practical ideas which chefs could implement on return to their business. (Target 30 chefs per workshop).
14. A target should be set with the objective of getting Donegal potatoes, and one Donegal seafood product onto every hotel and restaurant menu in the county (where appropriate to the restaurant menu). There should be supply chain solutions provided as part of this objective on where to source the product and how to get it easily. An associated PR and marketing campaign to benefit the foodservice operators.
15. A full day workshop should be provided for farmers and growers about dynamics of supplying retailers/foodservice operators and the need to understand the "value versus provenance equation".

16. A half day information session should be run for regional food distributors within the county to highlight gaps where retailers and foodservice operators are finding it challenging to get certain products to market e.g. seafood from Killybegs, etc.

9.4 PRIORITY FOUR **Consumer Education/Consumer Focused Events (Year 2 to Year 5)**

Once the producer base has been strengthened during year one, the number of consumer focused events within the county should be dramatically increased and this should be tied in with an overall consumer local food educational strategy. Year two consumer focus should be on consumers within Donegal County, year three to five should focus on food tourism and attracting national consumers to Donegal as a food holiday destination. The following actions relate to consumer work streams:

HIGH PRIORITY

1. Full local media and PR campaign is to be developed and costed.
 2. The Donegal Food Coast brand should start to be promoted heavily in year 2 and be used at local county level as an umbrella brand for all food based activities from food producer's right through to all local consumer events (the Food Coast Brand should not be used outside of the county until year 3).
 3. A quarterly consumer Donegal food magazine should be published with its primary target for year two being Donegal county residents.
 4. A campaign to promote locally sourced food on Donegal menus should be modelled around the Bord Bia "Just Ask" campaign. It may be possible to customise the national campaign to suit the county e.g. Just Ask for Donegal Potatoes, Just Ask for Donegal Seafood etc.
5. A food trail should be set up in conjunction with tourism stakeholders and should be modelled on best practices elsewhere in the country. In particular the Kilkenny Food Trail could act as a benchmark. Ref: www.trailkilkenny.ie/food-trail. A decision will need to be made if there is merit in combining food and craft as one trail.
 6. A series of large scale food cookery events, featuring food from the county and as many local chefs as viable, should be run three times throughout the year with a target of over 300 people attending each. This should be modelled on the Tipperary food producer cookery events. A food producer consumer showcase should be run in conjunction with this event. (some initial work in this area has already commenced on the "community chef" programme).
 7. From year 2 onwards food festivals should be encouraged to continue their pattern of growth. While all other smaller food festivals play a role in promoting Donegal food, it will be vital that the promotion of local food is the number one message for each festival. It would be advantageous to develop one "super festival" which would act as a national voice for Donegal food similar to Savour Food Festival Kilkenny.
 8. The initial strengthening of one farmers market to become a destination market in the county should become a focus in year 2. This market should receive training for all stall holders in sales and marketing skill sets, additional marketing support to promote the market to the consumer base and be promoted as a destination attraction within the county.

9. A twelve month campaign of food producers tasting product in store should be put into place. This should have a minimum target of 150 tasting days throughout the year and should also include “meet the farmer” as well as “meet the maker” days.

9.5 PRIORITY FIVE **Wider Geographical Promotion of Donegal as a Food Destination (Year 3)**

It is recommended that at the beginning of year 3 a strategic review is conducted of progress to date. Assuming the key KPI's set down have been achieved, then the strategy should next focus on marketing Donegal externally outside of the county and in some instances outside of the country. These work streams should include:

HIGH PRIORITY

1. Developing a national marketing campaign embracing E-marketing and traditional marketing channels to promote a new more robust Donegal food messages under the Food Coast brand (the Food Coast brand is still to remain a brand of origin only and an umbrella marketing brand for food businesses).
2. A Donegal Food Road show should be taken on tour to all major national food events to promote the county as a food tourism destination. A target of ten national high profile events etc. should be exhibited at e.g. The National Ploughing Championships.
3. The marketing of the county's largest food festival should be taken on a national scale.
4. In partnership with Failte Ireland a complete food tourism programme for Donegal should be developed and rolled out.

9.6 Strengthen Links with Farming Community

Throughout the research, queries and requests came from interviewees about the availability of locally grown and reared product. A small number of retailers and foodservice operators have forged strong links with the farming community but opportunities are also present to leverage this.

HIGH PRIORITY

- Gaps within the county for farmed products should identified and linked back to the farming community.
- Farmers should be educated on the commercial prize for supplying the local market through a series of half day workshops.
- A section should be included in the food finder directory on farmers who have an interest in supplying the Donegal market.
- Training programmes should also be developed to encourage farm diversification into added value product (to include next generation young farmers and part-time farmers which the farm may not financially support currently).
- A tour for ten farmers who are interested in moving into secondary production should be organized to visit farmers who have diversified into artisan food production, particularly in categories where farm diversification products where developed e.g. dairy & meat related products.
- A workshop themed “Lost and Forgotten Skills” should be facilitated for farmers with the objective of stimulating new businesses from “old” food ideas.
- As part of the high profile farmers market, tables should be set aside at the market for farmers willing to sell a small amount of seasonal crops locally.

9.7 Strengthening Links with the Fishing Community

As a strong seafood producing county, it will be vital that strong linkages are created between the fishing community and retailers/ foodservice operators within the county. While many seafood companies export product, there is an opportunity to increase the amount of locally caught product consumed by the Donegal public.

HIGH PRIORITY

- A feasibility study should be conducted to explore the viability of developing a shared aquaculture depuration facility. (This should be linked to previous work conducted by the Marine Institute).
- A simple study should be undertaken to see how international seafood logistics can be improved for the benefits of the seafood community in the county.
- Two international seafood buyer visits should be hosted annually to a pre agreed plan set out by the buyers with the core objective of getting more Donegal seafood product on the international table.
- A marketing campaign should be developed within the county to celebrate the significant seafood successes through a PR and marketing programme.
- A short route to market review on seafood distribution solutions within the county should be conducted with the objective of getting seafood to the consumer in a more efficient manner.
- A strong consumer seafood education programme should complement other consumer activities.
- A programme should be developed to highlight food sustainability stores.

9.8 Priorities at a glance

Priority	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
1 Enablers	✓				
2 Increase the amount of new food start-ups	✓	✓			
3 Grow Turnover & Profitability of Existing Producers	✓	✓			
4 Consumer Education/ Consumer Focused Events in County		✓	✓	✓	✓
5 Wider Geographical Promotion of Donegal as Food Tourism Destination			✓	✓	✓
6 Strengthen County Links/Activity with Farming Community	✓				
7 Strengthen County Links/Activity with Fishing Community	✓				

10. Conclusion and Acknowledgements

Food Harvest 2020 – A vision for Irish agri-food and fisheries, published by the Department of Agriculture, Fisheries and Food (www.agriculture.gov.ie/foodharvest2020) in its opening section states that while the years leading to 2020 will see a continuation of current challenges such as the perceived lack of scale, fierce international competition, international retail consolidation and changing consumer demand, “the most compelling picture that emerges of the decade ahead is one of opportunity. In particular, the opportunity for the Irish agri-food industry to grow and prosper sustainably through the delivery of high quality, safe and naturally based produce”.

This is the context in which we have developed the Donegal Food Strategy and is the positive mind-set in which we must embrace its implementation. This strategy outlines the actions and activities needed to make Donegal a county famous for food and recognised as a pioneering region for supporting the establishment and development of food

businesses. In the preparation of the strategy there was enthusiastic involvement by all sectors involved in food within and outside the county. For the strategy to succeed we will need to deliver on the vast majority of not only the “priority actions” but also the “desirable actions”. This will require collective buy-in to the vision and objectives as set out in the strategy and commitment from all over the next five years to the delivery of the identified actions.

We would like to acknowledge the involvement of all the stakeholders in the preparation of the strategy including, Enterprise Ireland, Údarás na Gaeltachta, Bord Iascaigh Mhara, Bord Bia, Teagasc, Fáilte Ireland, Letterkenny Institute of Technology, Donegal Local Development Company, Inishowen Development Partnership, IFA, and representatives from the farming, fishing, shellfish, hotel, restaurants, food services and food manufacturing businesses from within the county.

We would also like to acknowledge the work and expertise of James Burke & Associates in the preparation and drafting of the strategy and for the significant experience and added-value which they brought to the project.



Appendices

Appendix 1

Desirable Actions

This document contains actions which are deemed to be essential but not high priority. They should be viewed as items which need to be implemented, but only after the high priority activities have been commenced.

9.2 Priority Two Increase the amount of new food start-ups

1. A series of five “start your own food business” road show talks would be given at different venues throughout the county by high profile existing food producers from all parts of Ireland who would guest speak. This road show series of talks would have a full array of information for perspective producers and a network of contacts would be built which would be followed up by the start-up mentor person. A minimum of twenty five attendees per venue would be targeted.
2. A programme similar to the “Tipperary Food Connect” programme would be devised for transition year students with specific emphasis on careers within food businesses. A target of ten participating schools and an excess of 250 students would be needed for year one.
3. The content of the culinary arts programmes run by LYIT should be improved to include a greater emphasis on artisan and local food production with a specific segment dedicated to starting a food production business.

9.3 Priority Three: Growing Turnover and Profitability of Existing Producers

1. A Bord Bia/Enterprise Ireland review of all producers within the county will be facilitated so that both agencies can determine what additional supports can be offered through national development.
2. In conjunction with Bord Bia, an annual workshop focused on innovation and using the newest food ideas from around the world to stimulate practical insights for the producers to harness should be run.
3. A PR expert for all existing producers will be provided with the targeted aim of having 15 national media hits and 30 regional hits over a six month period. The objective of this is to attract trade buyers and also to create awareness among the public to stimulate further food start-ups.
4. Bord Bia will be requested to hold at least one of its national training workshops within Donegal county.
5. Facilitate a farm coach tour for up to 20 retailers and chefs which would see site visits to farms representing a number of different sectors e.g. potato, veg, beef, etc. and also a visit to fisherman/fish processors who specialise in selling product though out the county.
6. A retailer/foodservice affiliate programme should be created where chefs and store owners would sign up to a charter giving their support to locally produced

product, how they will treat these producers and identifying areas where they can lend their support.

7. A short feasibility study should be conducted on distribution options to service the Dublin and national markets and partnership formed with key distributors who will improve route to market access. The objective of this work stream is to make national sales growth an easier prospect for existing producers.

9.4 Priority Four: Consumer Education/ Consumer Focused Events (Year 2 to Year 5)

1. A website containing information for residents of the county about where to find local food, details of restaurants etc. should be created. This may not have to be a standalone site, and could be part of an existing site.
2. Every National school in the county should be encouraged to participate in a local food related project in year 2. This could take the form of meet the maker visits to every class in every school on a rotating basis, art competitions or school projects focused on local food themes. Participating students should all receive leaflets detailing local food within the county
3. If possible, the Slow Food Convivium for Donegal is to be re-established.
4. A consumer focused restaurant awards scheme modelled on the Restaurant Association of Ireland annual awards should

- be run for the Donegal region with the objective of recognising exceptional food stories and promotion of local food within the county.
5. Non-food festivals, e.g. music festivals, should be encouraged to incorporate food as part of their programme of events
 6. Education leaflets, advertisements, and media pieces with a target hit rate of one media hit per week should be launched with the objective of getting the public consumer to understand why Donegal is becoming famous for food.
 7. A programme targeted at restaurants and hotels with five calendared events throughout the year should be planned from year 2 onwards. These could be themed events surrounding key milestones e.g. Valentine's Day, Mother's Day etc. and must have Donegal produced and grown food as the core message e.g. "Enjoy Donegal grown and produced food for Valentine's Day across twenty restaurants. Two courses for € XX." Where funding is provided, these events which clearly have locally produced food as the core beneficiary should receive marketing support.
 8. Cookery schools within the county should be harnessed as a fun communication tool to get the general public more interested in food within the county. E.g. a programme modelled on discount vouchers to allow customers to avail of reduced price cookery classes promoting local food
 9. As a key communication tool Facebook should be central to the year 2 communications. A target should be set for every producer, restaurant and other key food stakeholders, to have an active Facebook profile. This may entail providing training and other assistance to get this online community mobilised. Twitter should also be incorporated into this online consumer communication strategy.
 10. A retail consumer communication programme based on the Taste Council Food Heroes Concept where a suite of marketing material would be available to all retailers within the county and producers which would highlight the provenance of locally produced products in a recognisable consistent format which would tie in with the Food Coast branding.

A target of 80% of suitable retailers should be participating in the programme (it is unlikely that all of the large multiples will be allowed participate in this so it should be targeted at symbol group and specialist retailers)
4. Professional bodies, national state agencies etc. (all with a food connection) should all be invited to host at least one meeting during year 3 in Donegal e.g. the board of Bord Bia, The Taste Council, Euro-Toques, The Irish Restaurant Association, and The Irish Hotel Federation etc.
 5. An innovative marketing campaign to promote the county as a food destination should be developed by specialist food marketing company e.g. Prize on The Late Late show for Donegal Food Extravaganza Weekend etc.
 6. National Chef Events should be invited to hold their grand finales in Donegal e.g. Food and Bev Live.
 7. An annual event within Donegal should be run for all Bed and Breakfast owners, and hotel management and staff, to brief them on the food story within the county and ensure that they have literature promoting the many events, activities and food trails within the region.

9.5 Priority Five: Wider Geographical Promotion of Donegal as a Food Destination (Year 3)

1. A national food event such as The Taste Council Annual Summer School should be hosted in Donegal.
2. Donegal should pitch itself to attract some of the national commercial food venues e.g. Bord Bia Marketplace (Kinsale was the home for the fore runner to Marketplace for many years and benefitted from over two hundred national buyers visiting it during the event).
3. Chefs from within the county should be encouraged to enter every possible national and international chef's competition and awards won should be aggressively highlighted at a national level.

Appendices

Appendix 2

Criteria for using the Food Coast Brand

The Food Coast brand is a brand of provenance and can be used to promote any food product which is made in Donegal or any activities within the county designed to promote Donegal Food. The proposed criteria for using the Food Coast Brand are as follows:

- The Food Coast Brand is a brand of provenance (people and place).
- It can only be used when highlighting people and places, and is not a brand indicating quality levels.
- Where the Food Coast Brand is used on a product to highlight provenance, the product must be produced in Donegal (produced is defined as the final steps in creating the product, and could range from full scale scratch production to adding value to a product. The product should be a minimum of 50% added value at the point of manufacture, which should be completed in Donegal. This will need to be demonstrated at the time of application to use the Food Coast Brand).
- It is envisaged that where available possible, the maximum number of ingredients for products will be sourced locally.
- Product imported and repackaged within the county does not qualify for using the Food Coast Brand.

- All applicants must complete an application form.
- Permission to use the Food Coast Brand will be withdrawn if there is any breach of the rules.
- The applicant will be responsible for all costs incurred through destroying marketing material, etc., if permission to use the Food Coast Brand is withdrawn.
- If the Food Coast Brand is used by a retailer or foodservice operator, producers from the county must benefit through being used as ingredients, on menus, on shelf etc. Retailers or foodservice operators applying to use the brand must be able to demonstrate that over 5% of the value of their purchases is from a product produced in Donegal. (5% is a minimum threshold and the spirit of the use of the Food Coast Brand is that each establishment using the brand will do their utmost to maximise the use of Donegal produced product).
- All current permission to use the Food Coast Brand as of April 2012 is deemed to be cancelled. Future use will require prior written approval from Donegal County Enterprise Board. Each permission to use the brand will be valid for 12 months from the date of issue once the minimum criteria are met.
- An annual membership fee of €200 will be required to use the brand and also allow members to be part of the Food Coast. Businesses in their first 12 months of life, at the date of application will be charged a nominal €50 fee.

Membership of the Food Coast will entitle all members to participate in the subsidised activities outlined in the Food Strategy Document including mentoring, training, networking events, marketing programmes, showcase events, etc. Any persons or companies not part of the Food Coast will not be eligible for support for any of the items outlined in the strategy. (The total 5 year strategy investment will be in excess of €500,000).

- For restaurants and hotels to use the Food Coast Brand, the following criteria will apply:
 - Locally sourced product should be used where available e.g. potatoes, seafood, etc.
 - Producer/grower names should be highlighted on menus.
 - Applicants must have signed up to the foodservice/retailer affiliate programme.
- A Food Coast brand approval sub-committee of 6 people should be created who will scrutinise all applications and will act as a judicator where any question of withdrawing the brand arises. This committee does not necessarily have to be made up of the steering group and should be all independent, partial representatives with a clear understanding of the ethos of the Food Coast Brand.

