

Add three ingredients...

KILKENNY FOOD VISION

2020 - 2025





ACKNOWLEDGEMENTS

Without the input of all the Kilkenny Food Stakeholders, this strategy would not be possible. The well attended meetings, the honest feedback and the great creativity are very much appreciated. We also wish to acknowledge the generous permission to use photos in this document with thanks to Neans McSweeney (McSweeney Media), Dylan Vaughan (photography), Louise Jordan (TL Marketing), Savour Kilkenny, Kilkenny Tourism and Taste Kilkenny (photography) and all those individually featured in the images.

CONTENTS

1. Introduction	2	14. Achieving the Targets	24-28
2. Rationale for a Kilkenny Food Strategy	3	14.1. To support 2 food processing start-ups per annum to successfully commence trading, and to support growth within 2 existing micro food enterprises per annum	
3. Foreword	4-5	14.2. To increase the amount of local food on local menus and retail shelves and grow the purchase value by foodservice operators by 25%	
4. Executive Summary	6-7	14.3. To create more market (indoor and outdoor), pop-up retailing and direct selling access to consumers for food producers	
5. Methodology	8-9		
5.1. Methods Used			
5.2. Phases			
6. Kilkenny Landscape	10-15	15. Enablers	29-33
6.1. Tourism Overview		15.1. Develop a Kilkenny food verification system	
6.2. Agriculture Overview		15.2. Put in place a Food Development Office	
6.3. Food Market		15.3. Develop a Kilkenny Food & Beverage Brand	
6.4. Population Statistics			
6.5. Restaurants		16. Local or Regional Approach?	35
6.6. Festivals			
6.7. Kilkenny Food Trails		17. Implementing the Strategic Goals of the Kilkenny Food Strategy	36
6.8. Cookery Schools		17.1. Formation of a Kilkenny Food Development Company	
7. Ireland's National Food Landscape/Policies	16-18		
7.1. Food Sustainability			
7.2. Food Tourism			
7.3. Ireland's National Food Strategy – Food Wise 2025			
8. International Research	19		
9. Key Kilkenny Research Findings	20-21		
9.1. Kilkenny Food Assets			
9.2. The Kilkenny Consumer			
10. Kilkenny Food & Beverage SWOT Analysis	22		
11. Evolving the Success	23		
12. Strategic Vision	23		
13. Strategic Targets	24		



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**KILKENNY
FOOD
VISION**

2020 - 2025



Oifig Fiontair Áitiúil
Local Enterprise Office



Rialtas na hÉireann
Government of Ireland

Tionscadal Éireann
Project Ireland
2020





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KILKENNY FOOD VISION

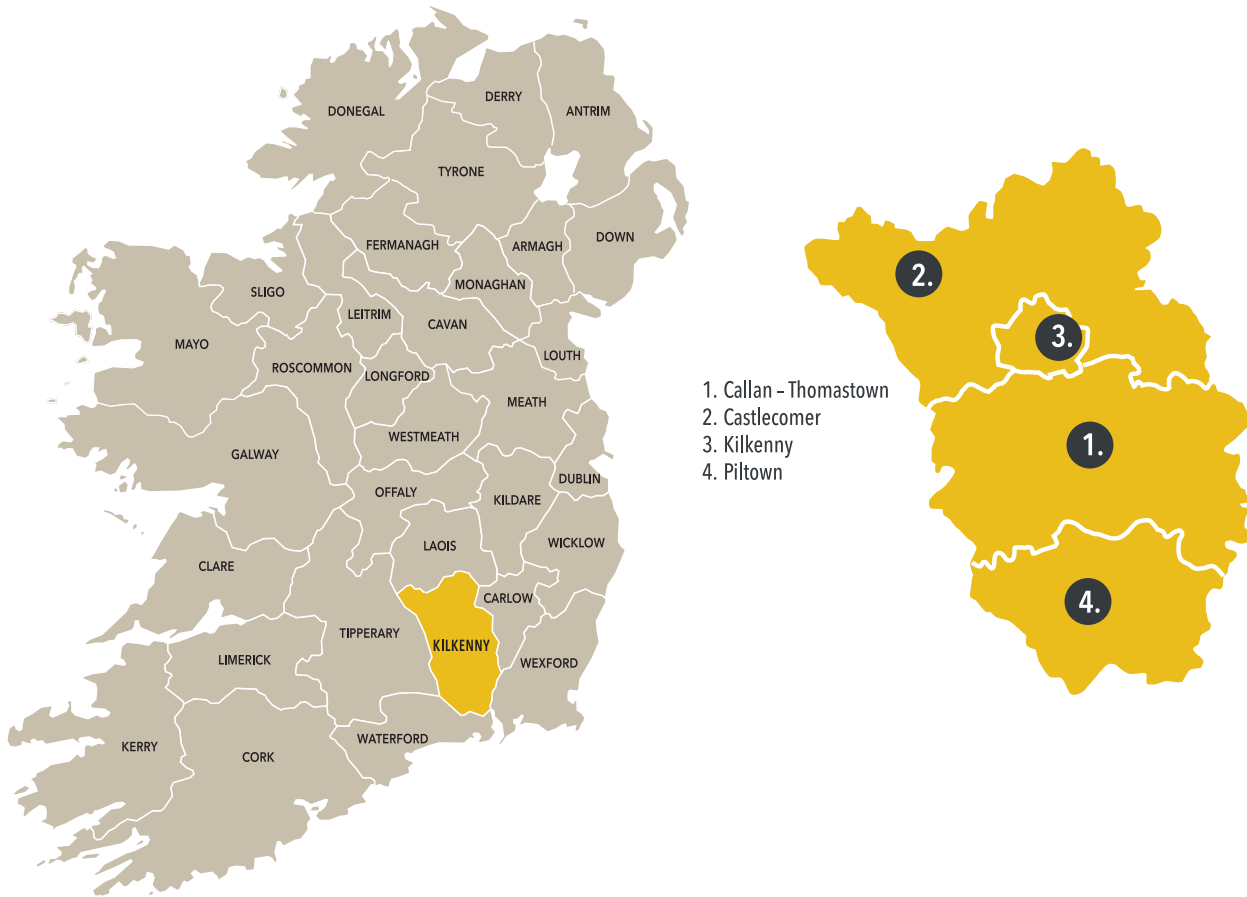
2020 - 2025

1 | INTRODUCTION

In February 2019, County Kilkenny LEADER Partnership (KLP) and Local Enterprise Office (LEO) Kilkenny tendered the creation of a food strategy for the county. Following a tender process, James Burke & Associates (JB&A) were appointed to facilitate the research and creation of a food and beverage strategy for County Kilkenny. The scope of the strategy included the following:

Kilkenny LEADER Partnership (KLP) and Local Enterprise Office (LEO) Kilkenny are seeking experienced parties to assist the KLP and LEO Kilkenny to develop a new 'food strategy' for County Kilkenny. KLP and LEO Kilkenny are partners in a development process leading a group of wider stakeholders in the strategy's development. The stakeholders have an interest in the production, processing, promotion and consumption of locally sourced food in the new 'food strategy'. The partners propose to build on the success of the previous strategy produced for the County - Growing a Local Food Economy: 2009-2014.

The scope will involve facilitation of a consultation and strategy development process among the diverse stakeholders in food production, processing, retail, food service, nutrition, hospitality and tourism in County Kilkenny.



- 1. Callan - Thomastown
- 2. Castlecomer
- 3. Kilkenny
- 4. Piltown

This includes the convening and hosting of meetings; group and one-to-one consultation/facilitation among stakeholders; liaison with the project partners (KLP and LEO Kilkenny) on progress; drafting of provisional reports and production of the final approved report.

2 | RATIONALE FOR A KILKENNY FOOD STRATEGY

This food strategy builds on the previous work carried out in County Kilkenny following the publication of “Growing a Local Food Economy - the County Kilkenny Food Strategy 2010 – 2014” which resulted in the County developing its food landscape and growing its food reputation significantly, since its publication.

In 2018, Kilkenny was recognised at national level by being named “Foodie Destination of the Year for 2018”.

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The rationale for creating a new food strategy is:

- To plot a new roadmap for the next five years
- To provide coordinated direction for evolving current initiatives and activities
- To identify new areas of focus which will help evolve the Kilkenny food landscape to the next level of success
- To provide Kilkenny food and beverage stakeholders with clear direction and new focus
- To provide an opportunity to take stock, and reaffirm commitment to growing the local micro food economy





3 | FOREWORD

A lot has been spoken and written about the importance of food to the national and local economy. In deciding to review the ground-breaking Kilkenny Food Strategy 'Growing a Local Food Economy' - launched in 2010, the local development partners - Kilkenny LEADER Partnership (KLP) and Local Enterprise Office (LEO) Kilkenny were mindful that the initial development process over the course of 2009 of developing Ireland's first county food strategy was very broad-based and inclusive. The resulting plan was accordingly broad in scope and relatively large in the number of actions. This approach had more than proved its worth in the commitment to the strategy that resulted and the level of personal initiative that stakeholders displayed in driving and participating in various elements.



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However, there was also a recognition, that a decade following that pioneering strategy, the enthusiasm of the time could not be expected to be easily reproduced- and that much of the initial groundwork remained valid and not necessary to replicate. Instead the partners planned a shorter development period more focused on a specific set of objectives that will be both achievable and have a strategic impact on the food sector in the county. The objectives were selected as it was hoped that the targets will benefit stakeholders across the value-chain - and the development process included representatives from right across that producer/grower to consumer spectrum. The three headline objectives will facilitate a focus by agencies and the wider trade around an easily understood and mutually beneficial set of targets. Of course, in achieving these headline objectives, the partners are confident that many more benefits direct and ancillary will also be achieved.

Another key learning since the first food strategy was the need to consider stakeholders beyond the county borders. During the review process the Kilkenny stakeholders gave a significant level of thought and discussion to whether it was better to have a county or a regional strategy. There are pros-and-cons to both approaches. The Kilkenny partners appreciated the value of scale/ volume and reach that the regional approach offered vis-a-vis that of single county. On the other hand, the challenge of organising on a regional basis could as it stands compromise the desire for a targeted and strategically impactful set of objectives. In the final analysis, the Kilkenny stakeholders decided to plan for the county- but reach out to the region. An initial meeting was arranged by the Kilkenny partners with their equivalent bodies - LEADER and LEO, in the other four South East Region counties. The meeting was very positive and an approach to ensure cooperation was agreed, with plans for that collaboration to intensify.



A set of enablers and facilitatory actions are agreed as being essential to the delivery of the Strategy's objectives. These actions are ambitious and realising them will be challenging. But both the agency partners are committed to securing the necessary resources to ensure they occur.

KLP and LEO Kilkenny extend their thanks to the whole team at James Burke & Associates for their flexibility and proactive participation in the process. James and his team had assisted at the birth of Growing a Local Food Economy all those years ago, and it was great to have people expert in the sectors and knowledgeable of the county's particular features involved again. But our biggest thanks are to all the food stakeholders who participated so enthusiastically in the development of the new Strategy- farmers/grower, producers, processors, chefs, restaurateurs, hospitality business owners, tourism operators- and last but far from last, consumers. The partners hope once again that the process of development means that you feel that it is Your Kilkenny Food Strategy.

Declan Rice
CEO, Kilkenny LEADER Partnership

Fiona Deegan
Head Of Enterprise



4 | EXECUTIVE SUMMARY

Kilkenny produced an original food strategy which was launched in 2010. In the intervening years, the County has raised its food profile at national level culminating in winning the foodie destinations award in 2018.

Kilkenny LEADER Partnership and Local Enterprise Office (LEO) Kilkenny, recognising that a decade had passed since the original strategy was created, commissioned a new strategy during 2019.



Significant domestic and international research was conducted, as well as a large number of Kilkenny stakeholder consultations. This identified that some of the core strengths of the region are:

- The region has a strong collection of eateries with good food credentials
- There is strong multi agency support for the food sector
- Savour Kilkenny is recognised as one of the best food festivals in Ireland
- The 2018 foodie destination win was an endorsement of Kilkenny's food credentials

Key weaknesses identified were as follows:

- There is mixed evidence of "local food on local menus"
- More coordination between all food stakeholders is required
- There is a shortage of artisan food producers in some categories e.g. cheese makers
- There are limited examples of local farmers supplying produce onto the local market



From the consultation process, a strategic vision and three targets were identified which will become the focus for the next five years. These are:

Vision

To be the region with the strongest local food economy and food sustainability focus in Ireland, which will be achieved through a target driven approach, with measurable outcomes, and which will commercially benefit all food stakeholders.

Targets

- To support 2 food processing start-ups per annum to successfully commence trading, and to support growth within 2 existing micro food enterprises per annum
- To increase the amount of local food on local menus and retail shelves and grow the purchase value by foodservice operators by 25%
- To create more market (indoor and outdoor), pop-up retailing and direct selling access to consumers for food producers

The achievement of the targets will need to be supported by enablers.

Three key enablers were identified:

- The development of a Kilkenny food verification system
- The creation of a food development office
- The development of a Kilkenny food and beverage brand



5 | METHODOLOGY

5.1. Methods Used

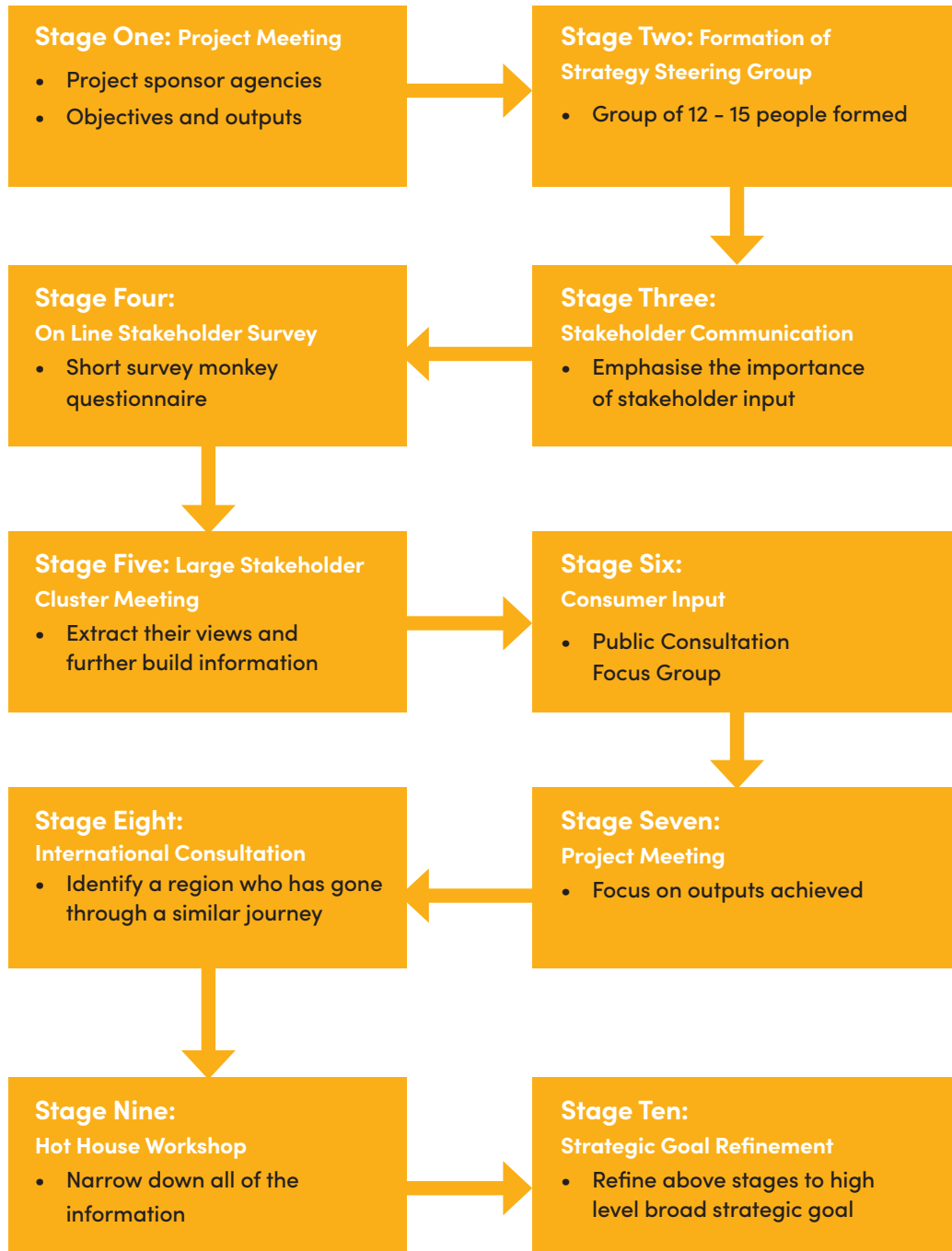
To facilitate the formation of this strategy, a new methodological approach was taken for this Kilkenny Food & Beverage Strategy.

- The formation of a steering group who met several times through the process to guide the strategy formation
- 2 large stakeholder meetings with a cross-section of 53 different sector representatives
- An online survey questionnaire completed by food & beverage stakeholders
- An online survey questionnaire completed by Kilkenny consumers
- A focus group with Kilkenny consumers
- Face-to-face interviews with stakeholders unable to attend meetings
- Telephone interviews with national food agencies/stakeholders
- Desk research on domestic and international food strategies and certification systems
- Interaction with food and tourism agencies
- Formulating conclusions and report writing
- International input from global food tourism expert Rebecca Mackenzie, Canada



5.2 Phases

The project was broken down into 10 distinct phases. Each phase determined the approach to the follow-on phase as set out below:



6 | KILKENNY LANDSCAPE

Kilkenny is a “hero site” within Ireland’s Ancient East, the marketing and branding of which is consistent with Kilkenny’s history and heritage. Festivals and events are an inherent and significant part of Kilkenny’s ability to attract visitors year after year.



6.1. Tourism Overview

Fáilte Ireland data for visitors and revenue to Co. Kilkenny indicate that the county attracted more than 600,000 visitors in 2017, generating close to €100m in revenue.

Kilkenny Castle (with 420,000 visitors in 2017) and the Medieval Mile Museum are key attractions for international tourists, while its reputation as a lively compact city makes it very appealing to domestic visitors, particularly at weekends. Overseas tour buses tend to be mainly day-trippers.

The market mix in Kilkenny is around 70% domestic leisure, with very strong trade on weekends. Around 40% of revenue is obtained on Friday and Saturday nights. The rest of the market is divided between international tourists and the corporate market.

Table 4.1: Tourism in Co Kilkenny 2017

Visitor Numbers (000's)	2017
Overseas	315
Domestic	298
Total	613
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Domestic	298
Total	613
Note: Fáilte Ireland data on overseas tourist visits at the county level is based on three-year rolling averages.	
Source: Fáilte Ireland	

Food in Tourism accounts for around €2bn or 35% of total revenue from visitors to Ireland (2017). It can be assumed that Kilkenny replicates this share of food business.

The Kilkenny County Council, Tourism Statement Of Strategy And Work Programme, 2017 – 2022 points to the county’s potential to make food an integral part of the tourism package:

Kilkenny is a “hero site” within Ireland’s Ancient East, the marketing and branding of which is consistent with Kilkenny’s history and heritage. Festivals and events are an inherent and significant part of Kilkenny’s ability to attract visitors year after year.

Tourism is currently a major revenue generator for County Kilkenny. As of 2017, there are almost 350 food and accommodation businesses in County Kilkenny, accounting for approximately one in six (16.7%) of the total number employed by all businesses.



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6.2. Agriculture Overview

The following statistics provide an overview of the local agricultural landscape and the diversity of farm types within the county.

Due to its fertile land, Kilkenny has a large amount of quality grassland, and therefore dairy and beef farming are the predominant farming activity.

- The number of farms in County Kilkenny as of 2010 was 3,737 ¹
- County Kilkenny has an area of 2,061 km squared
- Total land farmed is 166,000 hectares
- Number of people employed at farm level is 5,200
- Animals
 - o 70,000 dairy cows
 - o 40,000 suckler cows
 - o 50,000 breeding ewes
- 15,000 hectares of tillage crops
- Farm income: €85m approx.
- CAP payments: €60m approx.
- Value of agricultural output: €330m approx ²
- County Kilkenny is home to approximately 400 primary producers

Due to its fertile land, Kilkenny has a large amount of quality grassland, and therefore dairy and beef farming are the predominant farming activity. From this comes a high supply of milk and traditionally largescale cheese production. There are crops of barley and wheat but no longer malt. The growing of crops has waned in recent years due to the increase in dairy and beef farming and the ongoing trend of switching from arable farming to beef and dairy. Similar to many other counties, small animal holdings are also in decline due to the demise of the local abattoir in favour of larger national meat processors to the increase in dairy and beef farming and the ongoing trend of switching from arable farming to beef and dairy.



¹ *Life in 1916 Ireland: Stories from Statistics, Agriculture*, Central Statistics Office

² James Murphy, Irish Farmers Association

6.3. Food Market

There is a local weekly food market in Kilkenny city. The producer mix is made up predominately of food producers from several counties, who travel from market to market. There is a small presence of local, Kilkenny based food producers, farmers etc. There are a number of other country markets and food markets throughout the county on a weekly basis.

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6.4. Population Statistics

County Kilkenny has a population of 99,232. Approximately 25% of the population, 26,512, live in Kilkenny City.³

6.5. Restaurants

County Kilkenny is home to many excellent restaurants, including some with Michelin Stars, as demonstrated by the National 'Foodie Destination' Award in 2018.

There is a chef network in Kilkenny which is part of the national online chef network.

The development of the 'Dig a Little Deeper' campaign highlights the lesser known attractions in Kilkenny, which includes food producers, cafés, bars and restaurants linked to the locations and activities suggested in the agendas on the VisitKilkenny.ie website.

The casual dining scene has also grown in more recent years with award winning cafes, gastro pubs and artisan bakeries all emerging.

Thomastown has developed a reputation as a foodie destination with a trout farm, restaurants, a chocolatier, a food school and other food venues.



³ Central Statistics Office Census, 2016



6.6. Festivals

Savour Kilkenny Food Festival (Savour) is a well-known food festival, on the national stage, and is a week long festival which is held, leading up to and on, the October bank holiday weekend every year. It is well supported by local media and Kilkenny residents and the 4-day festival has an estimated 40,000 attendees.

Kilkenny also has many other large non-food festivals which attract significant followers, who also create a commercial benefit for the local food economy.

These non-food festivals include:

- The Cat’s Laugh’s Comedy Festival
- The Kilkenny Arts Festival
- The Rhythm & Roots Music Festival
- Yulefest Kilkenny
- Kilkennomics: Comedy and Economics Festival
- Subtitle: Foreign Language Film Festival
- Tradfest: Traditional Music Festival



Outside of Kilkenny City there is a growing number of events throughout the year including the Kilkenny Outdoor Music Festival in Castlecomer.

6.7. Kilkenny Food Trails

Kilkenny was one of the first counties to develop food trails and continues to operate trails some of which are 100% food focused or others intersperse food with other cultural visits. Some examples of the food venues included on trails are contained in the Trail Kilkenny site which suggests over 20 food destinations to visit.





Venues offering bespoke food and beverage experiences include Highbank Orchards & Distillery, Goatsbridge Trout Farm and Ballykeefe Distillery.

6.8. Cookery Schools

There are now several cookery schools in County Kilkenny providing ample choice, for both amateur and professional chefs. Some of these include:

- Thomastown School of Food
- Edward Hayden School of Cookery
- Ryeland House
- Eden Hall

7 | IRELAND'S NATIONAL FOOD LANDSCAPE/POLICIES

Local food sourcing, food miles and sustainable initiatives play well to Kilkenny strengths and will allow the new food and beverage strategy embrace this topic.



7.1. Food Sustainability

The “Climate Action Plan 2019” To Tackle Climate Breakdown was published by the Irish Government in June 2019 and sets out how Ireland intends to achieve a net zero target in Carbon Emissions by 2050, which does not compromise on national capacity for sustainable food production.

Within the Agriculture sector, this entails supporting diversification within Agriculture and land use to develop sustainable and circular value chains and business models for lower carbon intensity farming, including, organic production, and protection and enhancement of biodiversity and water quality; and the production of bio-based products and bioenergy through the Common Agricultural Policy and implementation of the National Policy Statement on the Bioeconomy.

In addition, Bord Bia's *Origin Green* programme brings together the food industry – from farmers to food producers, retailers to foodservice operators – with the common goal of sustainable food production. The overall ambition of the *Origin Green* programme is that farms and food manufacturing businesses throughout Ireland sign up to the sustainability agenda, making measurable commitments to producing in a sustainable manner, with progress independently assessed and verified.

Local food sourcing, food miles and sustainable initiatives play well to Kilkenny strengths and will allow the new food and beverage strategy embrace this topic.

7.2. Food Tourism

Fáilte Ireland's Food and Drink Strategy 2018 – 2023 highlights the critical need for Ireland's food and beverage sector to create “visitor experiences” and use “story telling” to enhance guest engagement. Kilkenny is well positioned to excel in these areas and has already begun its journey.

International Food Tourism competition is intense. If we want to make sure that Ireland's tourism industry keeps growing, we must innovate in order to add value and strengthen Ireland's appeal in international markets. One of the areas we need to develop is the food and drink experience that Ireland offers. Food and beverage consumption is an intrinsic part of the tourist experience. It can play a strong role in affecting destination choice, it's an important channel for tourists to experience the local culture, and spending on food comprises of one-third of tourists' total expenditure.

We must tell a renewed story about the Irish food and drink experience, focusing on quality, authenticity, innovation and value for money. A consistent message needs to be heard from points of entry through to every restaurant and café in the country.

Fáilte Ireland also established the Food Series concept, a schedule of food-related events within a region, spread over a defined period of time; partnered with Euro-toques and the Young Chef Programme to capitalise on the wealth of our culinary talent, and created and supported a range of industry awards to recognise and promote emerging Irish cuisine. As well as the Boyne Valley Food Series and the Burren Food Trail, successful initiatives include A Taste of West Cork, Sligo Food Trail, Food on the Edge, Ballymaloe LitFest, Dublin Food Chain and A Taste of Lough Derg.

Currently, in Ireland, food and beverage accounts for 35% of overall visitor spend, equating to €2 billion.

The Kilkenny Food & Beverage strategy, in its development, will consider the experiential element of food and will embrace the food series model.



7.3. Ireland's National Food Strategy – Food Wise 2025

Launched in 2015, Food Wise 2025 is a government strategy that sets out a 10-year plan in the agri-food industry, this strategy sets out to continue the growth of the Irish food industry which is vital for communities across the country.

The agri-food industry in Ireland currently provides employment for 163,000 people, equivalent to 8.4% of total employment with food and beverage manufacturing enterprises accounting for €26 billion of total turnover, comprising 26% of all manufacturing. At primary production level, some 140,000 farm families are involved in production of output valued at more than €7 billion. Together the beef and dairy sectors account for almost 70% of this output value.

Food Wise 2025 highlights the following areas as opportunities within the Food and Beverage sectors:

- Growth in global demand for nutritious food.
- Growth in demand for new products associated with latest consumer trends.
- Green/Sustainable Reputation
- Expansion in Dairy, Meat and Seafood Sectors
- Potential for new Foreign Direct Investments





Specific to the artisan/small food business sector Food Wise 2025 recommends the following actions:

- Creation of civic and festival markets similar to the English Market in Cork and Harvest Festival in Waterford in our major cities and towns
- Expansion of the Dublin Food Chain initiative to other cities. Create a pipeline of companies growing beyond Artisan/Small Food Business definition via the introduction of both bespoke 1:1 and group multi-level supports across strategic planning, marketing and marketing finance
- Introduce a new support programme for Direct to Consumer producers aimed at enabling producers to extend their local and regional business reach and resulting in a pipeline for new entrants to the Artisan Food Market at Bloom
- Increase the opportunity for successful meet the buyer occasions through market focused relationship development with distributors, specialist retailers, and other retail and foodservice buyers on the domestic and international markets
- Annual investment in and delivery of small business specific consumer and market insights. Formal opportunities to transfer learnings from craft food and drink production to new sector entrants via food apprenticeships and placements.

Food Wise 2025 also recognised the challenge faced by Agri-Food Industry in the light of climate change and clearly stated that “Environmental protection and economic competitiveness are equal and complementary: one will not be achieved at the expense of the other”.

Outside of export targets, two of the relevant growth projections for Ireland by 2025 are:

- Increasing the value of Primary Production by 65% to almost €10 billion
- The creation of an additional 23,000 direct jobs in the agri-food sector all along the supply chain from primary production to high value-added product development

Note: A public consultation on the strategy for the Agri food sector up to 2030 has been undertaken at national level, and closed end September 2019.

The Kilkenny strategy will embrace Foodwise 2025 vision and will place a specific focus on embracing the Agri related businesses within the county.

8 | INTERNATIONAL RESEARCH

Rebecca Mackenzie the Canadian based food expert and President & CEO of the Culinary Tourism Alliance was a contributor to the Kilkenny Food Strategy. Rebecca inputted first via an information/overview video, and later in the strategy creation, live via video conferencing. This allowed Kilkenny food stakeholders to immerse in the international food scene and have a dialogue about food developments with another region.



One of the successful initiatives of the Culinary Tourism Alliance was the implementation and maintenance of the 'Feast On[®] – Certified Taste of Ontario Programme which was established in 2014. Some of the key features of Feast On[®] are:

- A certified brand
- Designed to prevent "Green Washing" i.e. paying "lip service" to sourcing locally
- 140+ restaurants currently signed up. Over 300 certified since 2014
- Open book policy required as certificates are reviewed every 2 years. The restaurants must list their Ontario suppliers and the CTA has the right to contact suppliers, which they do during the biennial review of the Criteria Verification Templates
- To achieve certification restaurants must source a minimum of 25% of food costs must be from Ontario. For alcoholic beverages, this reflects be 25% of annual purchase or at least 25 items on a beverage menu coming from VQA wineries, Ontario craft cideries, breweries, and distilleries.
- Since the program's inception, the CTA has seen an increase in the average procurement by certified restaurants to over 50% of annual food costs supporting Ontario farmers and added value food and beverage producers.
- It is important to work with producers that have capacity to meet demand as often they don't have the scale/resources/ cash flow to expand

For further details to the 'Feast On[®] program
<https://ontarioculinary.com/feast-on/about/>

9 | KEY KILKENNY RESEARCH FINDINGS

9.1. Kilkenny Food Assets

The stakeholder consultations and meetings identified a list of food & beverage assets within the county. These assets can be viewed as foundation blocks the county possesses on which the strategy was built.



9.2. The Kilkenny Consumer

Uniquely, one of the focuses of the Kilkenny Food Strategy research was to home in on the consumer in order to gather their opinions, likes, dislikes and recommendations for a Kilkenny Food Strategy.

61 Kilkenny residents responded to an online food survey which was followed up with a focus group. Some key highlights were:

- Most respondents agreed buying locally produced foods was very important to them
- Fewer than 50% of respondents “strongly agreed” that Kilkenny restaurants/cafés are big supporters of locally produced and grown food
- Fewer than 40% of respondents felt that they had a strong knowledge of all the Kilkenny locally produced food and beverage
- Over 50% of respondents strongly or totally agreed that they are willing to pay a premium for locally produced food and beverage
- Most respondents would be highly likely to participate in a gourmet, open air movie night with local food (when presented with a list of possible food events, this was the most popular)
- Over 2/3 of respondents showed a strong interest in cookery classes focused on using local food as an ingredient



Most respondents agreed buying locally produced foods was very important to them

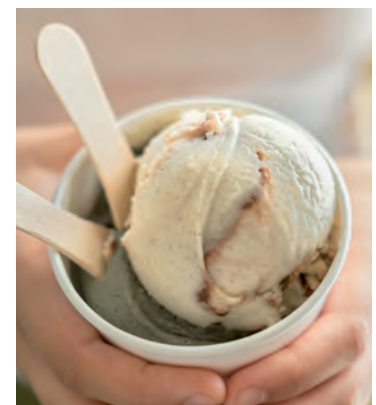
When asked how to create greater awareness of locally produced food and beverage, the most popular suggestions (unprompted) from Kilkenny residents can be grouped as follows:

- More tastings in local shops, markets and supermarkets
- Highlighting local food and beverages on menus including the development of a “Kilkenny menu” and an identification mark on menus
- Visual signs of Kilkenny logos
- A Kilkenny Farmers Market featuring only local food, operating at the weekends
- More advertising, marketing, promotion of local food and drink products
- More food festivals
- More emphasis on the nutritional and environmental benefit of local food and drink products

From a prompted list of possible food initiatives, the development of an indoor food market proved most popular, followed by a proposed scheme whereby Kilkenny restaurants and cafés would highlight locally produced food and beverage ingredients on menu, coming a close second.

There was a note of caution sounded at the consumer focus group where those present, while acknowledging an interest highlighting local food on local menus, also stated that great tasting food and menu innovation were key reasons for frequenting local restaurants. Value for money was also a factor.

This combined consumer feedback will be taken into account when crafting the strategy.



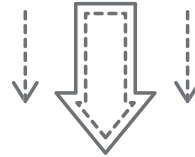
10 | KILKENNY FOOD & BEVERAGE SWOT ANALYSIS

The SWOT Analysis below is a result of a consultation with local food stakeholders through 3 steering group meetings, a cluster group meeting, project meetings and the consumer Focus Group. In total over 53 food companies, state agencies, consumers, producers and foodservice operators contributed to this.

10.1. STRENGTHS

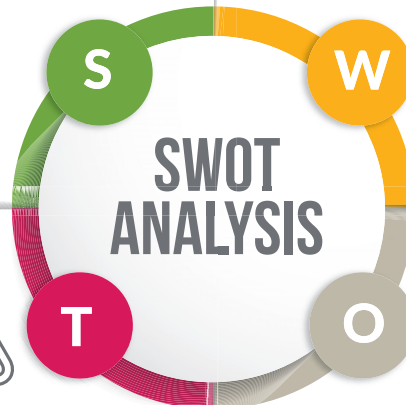


- A strong collection of eateries with good food credentials
- A diverse group of food and beverage producers within the county
- A significant farming cohort involved in large scale production
- More recent positive media coverage in relation to Kilkenny's food credentials
- Winner of RAI Best Foodie Destination 2018
- Savour Kilkenny recognised as one of the best food festivals in Ireland
- Glanbia HQ – global food expertise within the county
- Popular tourist city with food linked to some visitor experiences
- Strong multi agency support for the food sector
- Hard-working individuals and local leaders willing to invest time and energy for the greater good
- Positive sentiment shown by stakeholders to the development of the new food and beverage strategy
- The county has an abundance of great food stories to tell (both heritage and current)
- The work done by producers to "award" local buyers who support local food



10.2. WEAKNESSES

- Mixed evidence of "local food on local menus"
- Kilkenny food market has a shortage of Kilkenny producers
- More co-ordination required between all food stakeholders' groups
- Shortage of artisan food producers in some categories e.g. cheese makers
- The future Kilkenny food roadmap ahead seems less clear – "what next" question from many
- Lack of emerging food start ups
- Limited number of mid-range eateries
- Limited examples of local farmers supplying produce onto the local market
- Few examples of mid-size food and beverage producers scaling up to export level



10.4. THREATS



- BREXIT impacts
- Development of competing Irish food destinations in other counties as the food landscape evolves
- A potential drop in tourism numbers
- Food inflation
- Apathy among local Kilkenny food stakeholders and a failure to implement the strategy
- Fatigue among the current food champions and leaders



10.3. OPPORTUNITIES

- Getting more local Kilkenny people to buy more local food and supporting this with a local food verification scheme
- To capitalise on the growing consumer interest in food sustainability and harness this as a local food driver
- Over time to alter the visiting tourist mix, away from a value seeking tourist to one willing to pay a premium for a food driven experience
- Encourage the development of artisan producers
- Ensuring buy-in of all food stakeholders into one county wide food strategy
- Work with surrounding counties, in the future, to create a regional food destination
- Improving the telling of local food stories and heritage food links
- To achieve greater harnessing of *Ireland's Ancient East* initiative, by Kilkenny food stakeholders
- Improve the accessibility of local food at local food markets
- To strengthen Food Stakeholder collaboration and working together through clustering and networking
- To encourage great local food linkages with various non-food festivals e.g. *Cats Laughs, Kilkenny Roots Festival* etc...

11 | EVOLVING THE SUCCESS

Kilkenny has made significant progress since the original food strategy was devised in 2010. A snapshot of current successes is encouraging

- A vastly enhanced recognition of the region's foodie reputation
- Improved producer chef relationships
- One of the best food festivals in the country
- An engaged core group of food stakeholders who now want to move the journey on

The new strategy set out below takes the initial building blocks, extracts from them the next opportunities, and pinpoints a new unique journey which Kilkenny food stakeholders can embark on.

This new path will be a "first in Ireland" in terms of what it sets out to achieve and will allow the county's food and beverage stakeholders to evolve to a new high platform.

12 | STRATEGIC VISION

To be the region with the strongest local food economy and food sustainability focus in Ireland, which will be achieved through a target driven approach, with measurable outcomes, and which will commercially benefit all food stakeholders.



13 | STRATEGIC TARGETS

The strategy will have as its core the following 5-year targets:

- To support 2 food processing start-ups per annum to successfully commence trading, and to support growth within 2 existing micro food enterprises per annum
- To increase the amount of local food on local menus and retail shelves and grow the purchase value by foodservice operators by 25%
- To create more market (indoor and outdoor), pop-up retailing and direct selling access to consumers for food producers



14 | ACHIEVING THE TARGETS

14.1. To support 2 food processing start-ups per annum to successfully commence trading, and to support growth within 2 existing micro food enterprises per annum

The core workstreams include:

Start Up Initiatives

- A bespoke suite of marketing material setting out all the supports available for those starting a food manufacturing business will be creating in digital and print form
- A calendar of food information workshops/sessions will be developed to promote the concept of starting a food manufacturing/farm diversification business. 2 events per year will be run and will focus on local communities via "town hall" style meetings
- A local "food producer start-up ambassador" will be selected to promote food manufacturing as a career, and a calendar of activity for this ambassador created e.g. radio interviews, student engagement
- The link for the food e-learning hub for food start-ups, The Digital School of Food <https://www.digitalschooloffood.ie/> will be pushed out digitally, through all local agency social media platforms, existing food producers etc

- Dedicated pages/sections will be created on LEO/KLP sites which will feature tips and advice specifically for food start-ups and will signpost supports available
- In order to have sufficient numbers of participants to run the Food Starter programme annually, LEO Kilkenny will broaden its collaboration with South East Regional LEOs to encompass a wider population therefore increasing numbers of applicants
- Specific targeting of chefs and those training in culinary skills will be undertaken due to the higher propensity of these to start a food manufacturing business

Scaling Up Initiatives

- 10 food/beverage producers to be identified over the 5 years, who will be suitable for scaling up supports, and who will be receptive to the intervention
- It is recommended that all 10 be identified at the start of the 5-year journey and that supports be applied as appropriate over the 5 years
- A training needs analysis, and skills analysis to be conducted on each producer. As well as reviewing individual company needs, the analysis will focus on strategic enablers e.g.
 - o Sales and marketing
 - o People and management
 - o Operations
 - o Finance
 - o Strategy
 - o Innovation
- A market growth opportunity analysis to be conducted for each company to identify where sales growth opportunities potentially exist. Channels covered to include:
 - o Retail sector
 - o Foodservice sector
 - o Online selling via producer site and third-party online retailers like Amazon
 - o Food tourism direct visitor revenues
 - o Gifting and hamper opportunities
 - o Markets, festival and events sales opportunities

In order to have sufficient numbers of participants to run the Food Starter programme annually, LEO Kilkenny will broaden its collaboration with South East Regional LEOs to encompass a wider population therefore increasing numbers of applicants





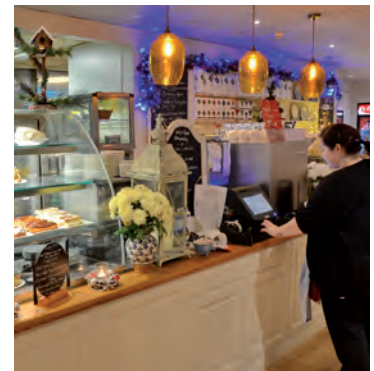
- An intensive business growth plan is to be devised for each business containing the following:
 - Structural improvements required
 - Management upskilling required
 - Funding gaps and proposed solutions
 - The creation of a structured sales and prospecting process
 - The development of marketing and promotional strategies
 - Product innovation calendars identified
 - A training calendar to be set out for each
- A progress tracker will be created to monitor each business' progress and quarterly milestones to be created
- Each participating company will be required to sit with the lead agency quarterly and submit project updates
- Each of the 10 producers to be matched with a "big brother/sister" large manufacturer who will agree to provide 2 senior level inputs over a 12-month period. These mentor companies will be from within a radius of 100 km from Kilkenny but confined to the county
- A business growth mentor will be assigned to each business for a 12-month period
- Farm based enterprises should be targeted as part of this scaling up initiative with particular focus on creating a "new model" to facilitate a cooperative approach among farmers interested in supplying the local market place directly



14.2. To increase the amount of local food on local menus and retail shelves and grow the purchase value by foodservice operators by 25%

The core workstreams include:

- The establishment of a first in Ireland “food verification system” (full details of this are contained in section 15.1). Year one focus will be on targeting local people to buy more local food. Year two and beyond will extend focus on attention on visitors and tourists
- A marketing campaign will initially focus on creating a “pull factor”
 - o Green and sustainability messaging will accompany this communication campaign e.g. less food miles, less and better packaging etc.
- School education food projects will be undertaken in all schools within the county e.g. planting schemes for the national schools, and food and chef talks for transition year students (using the Transition Year existing food programme). The Kilkenny School of Food should be explored as a possible coordinator for school education work streams
- An enhanced food producer directory (hard copy and online) will be launched to encourage even more chefs and retailers to buy local foods
- An annual food producer “meet the maker” event will be used to create greater awareness of Kilkenny grown, reared and produced food. This event has the potential to be regionalised to include neighboring counties over time
- At least one regional foodservice distributor will be encouraged to stock local food to improve access for restaurants, cafes and hotels for local food
- A marketing promotion/awareness campaign of seasonal Kilkenny food from farmers, growers and producers will be undertaken, and chefs encouraged to feature local seasonal food on their menus
- Exploratory talks will take place with all food retailers (large and small) to explore mechanisms to feature more Kilkenny products on shelf (either permanent listings or one-off promotions). Schemes to be explored include:
 - o The provision of special Kilkenny branded display unit (FSDU’s)
 - o The supply of Point of Sale material supporting Kilkenny messaging
 - o The scheduling of “Meet the maker” customer engagement visits instore
- Climate change and sustainability need to be central to the Kilkenny food verification scheme and should encourage producers, growers, foodservice operators and retailers to consider improvements in all of the following areas:
 - o Sustainability standards and commitments within each business
 - o Minimising or eliminating packaging
 - o Minimising food miles through collaborative distribution, etc.
 - o Waste recycling and minimization
- The focus within the food strategy on climate and sustainability should be guided by the Kilkenny County Council climate change adaptation strategy



14.3. To create more market (indoor and outdoor), pop-up retailing and direct selling access to consumers for food producers

The core workstreams include:

Consideration to be given to creating a mobile food solution, or easily erected pods which could be used in a “pop-up” fashion on the sites of some of Kilkenny’s larger workplace zones e.g. in the car park of a large office

- Liaise with Kilkenny County Council with a view to exploring the current casual trading spaces with the objective of increasing the number of pitches available at multiple high footfall locations throughout the city for food producers
- The creation of a calendar of activity to link “Non-food” festivals and events with the Kilkenny food community, with the objective to have local food sold at all non-food events. This will require a dialogue with non-food event organizers and support with merging food with their activities
- Consideration to be given to creating a mobile food solution, or easily erected pods which could be used in a “pop-up” fashion on the sites of some of Kilkenny’s larger workplace zones e.g. in the car park of a large office
- Engage with all local government facilities to explore how local food could be given greater access on an ongoing, or a “pop-up” basis e.g.
 - o Dialogue with the local hospitals to explore how local food could be incorporated into one menu item per week
 - o Discussions with the local authorities to explore how local food producer “pop-ups” could be scheduled four or five times a year, which would allow producers sell appropriate gifting/seasonal products to staff within Council Offices e.g. chocolates at Valentine’s Day etc.
 - o Conduct a review on all empty local authority owned premises to see if any would be suitable as producer pop-up spaces, selling to the public
- Explore with the local authority how criteria can be inserted into catering contracts for local authority owned premises, whereby contractors would be required to demonstrate local food initiatives and sourcing
- Engagement with all of Kilkenny’s commercial shopping centres to explore how local producers could be facilitated to create pop-up retail opportunities with a model which isn’t commercially prohibitive for the producers. It will be important that there is no displacement issues with current tenants
- Explore the creation of a regular indoor or outdoor market which would have a specific dedicated Kilkenny food focus.



15 | ENABLERS

To facilitate the achievement of the targets, core enablers need to be put in place. These enablers are as follows:

- The development of a Kilkenny food verification system
- The creation of a food development office
- The development of a Kilkenny food & beverage brand

Each of these enablers has been expanded below

15.1. Develop a Kilkenny food verification system

While this goal takes its inspiration from the Canadian ‘Feast On[®]’ scheme, it recognises that Kilkenny is a smaller county with a limited number of growers, producers and makers. This scheme will be the first of its kind in Ireland to use an open book verification system to drive the use of local food by foodservice operators and retailers

The aims of the scheme are as follows:

- To provide a verification system for all locally produced food and beverage
- To prevent “green washing”
- To commercially grow the Kilkenny local food and beverage supply base
- To provide a new marketing tool and USP for Kilkenny front end operators e.g. foodservice operators and retailers

Possible Structures

There are two possible solutions to developing the food verification system. Both will be explored and a decision on which is most viable and suitable:

- A possible licensing arrangement of the Canadian ‘Feast On[®]’ system
- The development of a bespoke system from scratch

Model Development

The scheme will have the following at its core operation:

- This initiative will target operators from some or all these categories within Kilkenny
 - Farms/growers/producers
 - Breweries, distilleries & cideries
 - Foodservice (from food trucks to fine dining)
 - Farmers’ markets
 - Retailers (with a local food/drink component)
 - Accommodations (with F&B on-site)
 - Food tours
 - Festivals and events
 - Attractions (with F&B services)
 - Culinary schools





- The scheme will require SEED funding. This potentially could be sourced from a combination of the agencies below
 - o Local Enterprise Office
 - o LEADER
 - o Rural Regeneration Fund (RRF)
- Industry stakeholder funding from those participating will be required from day one through the payment of membership fees
- Decreasing (“sunset”) subsidies will need to be put in place for year one to four, with the objective of being self-sufficient by year five
- Learnings from the Canadian model suggest that funding sources usually involve a sponsor as well as membership fees
- The operation of an open book audit/verification system will be required by those being certified
- Producer and grower upskilling will accompany the programme to help producers meet the needs of foodservice operators and retailers
- An initial audit to determine “market readiness” for all those wishing to participate in the scheme will need to be conducted
- The scheme will require its own brand as a subset of an overall Kilkenny food brand
- A short feasibility study will need to be conducted to validate the assumptions and create a clear understanding of the commercial model required to be self-funding by year five
- A key decision to be made is whether the scheme has enough potential participants for Kilkenny County to begin its journey, or whether a wider regionalised approach needs to be taken from day one. If commercially viable, it would be preferential that the scheme commences in Kilkenny
- Initially the scheme will be managed through the Kilkenny Food Development Office but may as it develops justify its own manager

It should be borne in mind that this scheme has the potential for a national roll out after a number of years. The initial focus should be to get it working in Kilkenny but all the planning should explore the expansion to a regional scheme

15.2. Put in place a Food Development Office

It is recommended that a Food Development Office (FDO) be put in place to oversee the following:

- Implementation of the Kilkenny Food & Beverage Strategy
- Co-ordinate all of the Kilkenny Food Stakeholders
- Oversee an umbrella Kilkenny Food marketing programme
- Develop a unifying Kilkenny Food Brand to provide coherence of the local food marketing and promotional landscape
- Run the verification system
- Implement a local food education programme etc.

Food Development Office Structure

- Vision for the Food Development Office;
 - o To be the “go to” hub for Kilkenny food & beverage
 - o Responsible for strategy implementation and co-ordination
 - o To facilitate a joined up “approach”
- Potential staffing model;
 - o Manager
 - o Administrator
 - o Project graduate (work scheme)
- The food development office team would have to have the following skills;
 - o Marketing
 - o Admin
 - o Brand building
 - o IT/Systems
 - o Project Management
 - o Knowledge of the Irish food and drink sector and the Kilkenny local market
- The FDO team would be responsible for;
 - o Driving the implementation of the Kilkenny Food Strategy objectives
 - o Implementing and maintaining the verification scheme
 - o To launch and run the Kilkenny Food Verification System
 - o Assisting in the coordination of food and drink events throughout the year
 - o Co-ordinating schools and educational talks with local food stakeholders about the importance of locally sourced food
 - o Raising awareness needed to create a link between local food and sustainability / combatting climate change
 - o Co-ordinating supports and increasing awareness to encourage and train start-up food entrepreneurs and those from a farming background seeking to diversify or supply local markets with existing produce
 - o Co-ordinating the Kilkenny Food Producers Network/ TASTE Kilkenny group
 - o Ensuring funding of the food strategy implementation via agencies, corporate sponsors and membership fees with the objective that the food development office is self-sustaining by year 4
 - o Food Steering group facilitation and co-ordination
 - o Identifying industry training needs requirements and coordinating the appropriate agencies
 - o Encouraging greater farm local supply, value-added products/ processing from primary production and farmer engagement with the strategy
 - o Fostering greater inter-agency co-ordination for food and beverage projects
 - o Fostering a Kilkenny food network with a remit of creating greater networking opportunities and upskilling the food community through seminars and industry events
 - o To act as a “convention bureau” type model for food related commercial opportunities e.g. working with hotels hosting large seminars to link local food with the event, liaising with inbound coach and tour operators requiring food experiences etc.





- o To maintain social media, website and marketing activity to support the development of the local food sector
- o Working with the Kilkenny accommodation providers over time to attract new visitors more focused on “experiential holidays” and premium food and beverage interactions
- o Co-ordinating an annual “food activity calendar” and an extension of food activities throughout the year
 - Build on Savour success and have this as the centre piece
 - Expand the calendar breadth and number of events each year
 - 2020 May to October – 25 events
 - 2021 April to October – 35 events
 - 2022 Jan to December – 40 events
 - 2022 onwards based on analysis
 - Modelled on the Boyne Valley Food Series
 - Will need a separate marketing budget
 - Central “marketing tool kit” to be provided
 - Branding
 - Templates
 - Generic images
 - Annual marketing training for those participating
 - Coordinated by the food development office
 - Industry stakeholders will be responsible for promoting and running individual events, and will benefit from revenue generated

15.3. Develop a Kilkenny Food & Beverage Brand

For the county to deliver a robust food journey as set out above it will need a strong food and beverage branding strategy. The county already has several food brands all with different roles and needs e.g. Savour, Taste Kilkenny, Kilkenny Food Trail etc

In addition, this strategy identifies the need to for further branding for the food verification scheme, the extended calendar of food activity and the need to create an umbrella for an active calendar of annual events

A brand design company will be appointed to review the following and create a new brand(s). The new brand/sub brands will potentially have the following roles:

- o To act as an umbrella brand for all current food activity in the county
- o To accommodate the food verification system and be useable on menu, on pack and on associated marketing material
- o To highlight the new 12 month extended calendar off food activity
- o To be used in targeting the food tourism sector
- o To support marketing material targeting “local food, bought by local people”



The new brand should contain the following “toolkit” outputs created by the brand design company:

- o Kilkenny food and beverage marketing material
- o Promotional flyers x 3
- o Promotional videos x 4
- o The creation of logos and possible straplines
- o The development of a one stop food website to host the verification scheme plus all local food & beverage messages
- o The design of trade marketing material for the verification system
- o The creation of social media platforms to encompass the above
- o The creation of a hard and soft version of the enhanced producer directory
- o The development of marketing brochures and material to support the food & beverage “bureau service”
- o The development of educational material targeted at students in local schools promotion the Kilkenny food landscape
- o The creation of a suite of marketing material to support the extended calendar of food activities

In parallel to the brand creation, a marketing upskilling programme will be put into place to allow all food stakeholders to upskill and tell their own story in a better way

In parallel to the brand creation, a marketing upskilling programme will be put into place to allow all food stakeholders to upskill and tell their own story in a better way.





16 | LOCAL OR REGIONAL APPROACH?

During the course of the research for this strategy, given the small size and rural nature of County Kilkenny (under 100,000 population, 75% of which live in rural areas) it was felt by some that the Kilkenny Food and Beverage Strategy should have a wider vision to include surrounding counties. This would allow for more funding and supports for a regional food brand, umbrella marketing and more synergies between producers.



It was also felt that Kilkenny could be too small to have sufficient numbers and varieties of farmers, growers and producers to put “Kilkenny on a plate”

Having considered several possible approaches, the approach to the strategy will be threefold:

- Commence all workstreams with an initial “Kilkenny only” focus
- Build initiatives so that, where appropriate, they can be regionalised later in their evolution
- Begin early stage discussions with interested neighbouring counties in order to identify “easy win” synergies



17 | IMPLEMENTING THE STRATEGIC GOALS OF THE KILKENNY FOOD STRATEGY



Food strategies globally are implemented more effectively if there is a structure, funding dedicated recourse in terms of personnel put in place. Therefore, it is recommended that the supports are established at an early stage in order to give the strategy maximum chance of success:

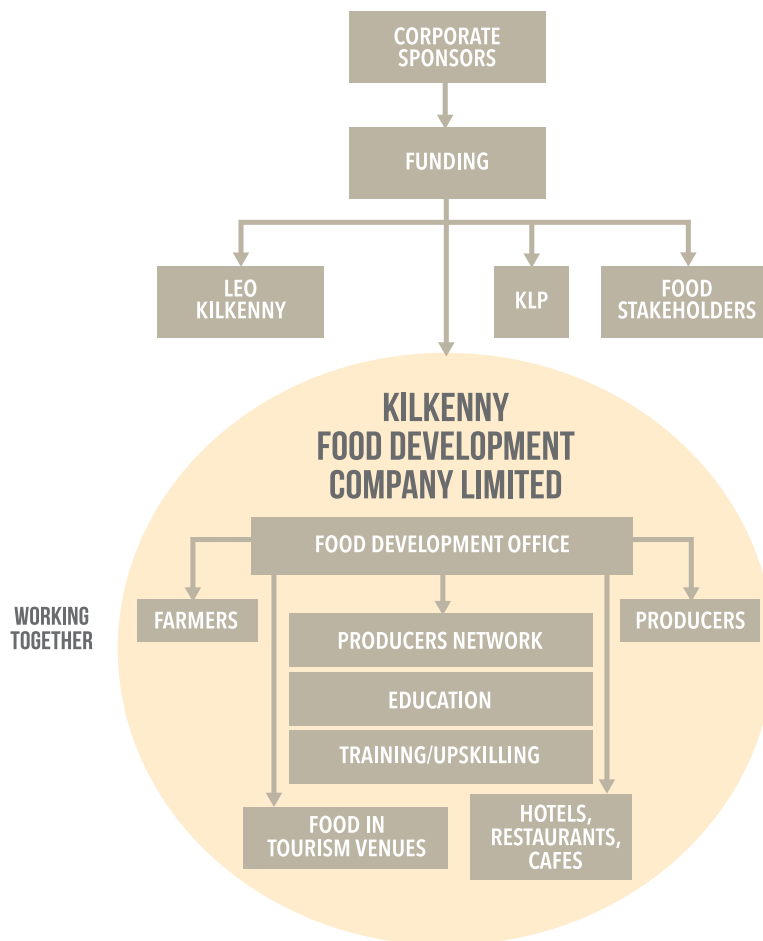
17.1. Formation of a Kilkenny Food Development Company

The strategy and the various work streams identified will need to be managed by a single “entity”. The vision is that the proposed Food Development Office becomes this singular driver.

Consideration should be given to the establishment of a not-for-profit Limited Company where the full strategy and verification system sit within. This company would have Directors and a wider steering group of representative stakeholders.

Funding could be provided by KLP, LEO Kilkenny, and in time, corporate sponsors and membership fees.

The structure below sets out the vision for this development company.





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 Stella £5
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 Red lemon £4
 Fraiche £5
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