



COUNTY MONAGHAN FOOD STRATEGY

2017 - 2020

*Addressing the need to maintain
and enhance the County's position
as a leading quality food producer*




Oifig Fiontair Áitiúil
Local Enterprise Office
Monaghan

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1 FOREWORD



Monaghan County Council welcomes the publication of the Local Enterprise Office's Food Strategy 2018 – 2020. It is essential that we nurture our vital food and drinks sector, address difficulties which may challenge its performance and be poised to exploit opportunities in a competitive and co-ordinated manner.

County Monaghan is a key player in food and drinks production nationally and the well established entrepreneurial spirit within the County, where 21.3 per cent of people are self employed as compared to 16.9 per cent nationally, will help us to maintain this position as industry leader. However, the need for a co-ordinated strategic approach is becoming increasingly important as we face new challenges and increasing competition.

This Strategy points the way to such an approach, where industry players are supported by each other and by government departments and support agencies. We wish the industry stakeholders and support agencies well and continued success into 2021 and beyond.

Cathy Bennett

Cathaoirleach

Monaghan County Council

2 INTRODUCTION

Monaghan Local Enterprise Office has developed the current Food Strategy as an acknowledgement of the extreme importance agriculture, together with the foods and drinks industries, play in our local economy. This study seeks to address the need to maintain and enhance the County's position as a leading quality food producer nationally and internationally.

It is difficult to overstate the importance of the agri-food sector to our County. Agriculture provides 12.5 percent of employment in County Monaghan as compared to a national average of 5.06 percent. Agriculture and food production together account for over 60 per cent of jobs in County Monaghan. Ninety percent of food produced in the county is exported.

Monaghan is home to some of the most successful and innovative food producers in the country and our tourism and hospitality sectors are experiencing an upsurge, due not least to the growing reputation of county Monaghan as a hospitality and foodie destination.

Initiatives such as the Food Strategy are undertaken to enhance and future proof the performance of County Monaghan in these areas which are vital to our economy, quality of life and future.

The Plan includes a series of strong and practical recommendations and we believe that it will form the basis of a co-ordinated approach to the development of our food and drinks industry into the future.

Eamonn O'Sullivan

CEO Monaghan County Council



3 EXECUTIVE SUMMARY

Monaghan Local Enterprise Office Monaghan (LEO) commissioned an external team to review the food landscape in the region and to develop a three-year strategy to support the food sector based on the findings of the review.

KEY ADVANTAGES

The key competitive advantages for the region identified as part of this work are:



Location

Proximity to key markets



Landscape/Natural Resources

A rich agri-food region



Leadership in Food Manufacturing

Some of Ireland's largest food sector specialists are in the area



People

A skilled workforce and a passionate food stakeholder group



Innovation

Many of Ireland's most innovative food businesses are based in County Monaghan

KEY CHALLENGES

The key challenges, which also represent the opportunities, are:



Collaboration

Little formal inter business co-opition



Networking

No regional food network in place



Promotion/Marketing

Minimal promotion of a co-ordinated Monaghan food message



Education

Further opportunities to upskill the food sector at all levels

STRATEGY FRAMEWORK

A framework has been developed to support the strategy under two main Guiding Principles under which the recommendations and actions sit. The Guiding Principles and associated Recommendations arising from same are as follow :

GUIDING PRINCIPLE	ASSOCIATED RECOMMENDATIONS
Awareness/Communication	<ul style="list-style-type: none"> • Foster Stakeholder Networking • Develop Food Calendar • Be a "Foodie" Destination for Tourists
Education/Innovation	<ul style="list-style-type: none"> • Create a Regional Food Education Hub • Become Food Innovation Leaders • Develop Ballybay Food Innovation Centre

Details of Recommendations are included in Section 14

KEY TO SUCCESS

For the strategy implementation to be a success, key enablers need to be put in place. These are:

- A proactive steering group
- Support & endorsement from the Local Authority
- An appropriate budget to support the projects
- A food facilitator who will coordinate the strategy implementation over its 3 years
- Inter-agency collaboration



4 METHODOLOGY

As part of a vision to further support and advance the local food economy, the Local Enterprise Office (LEO) Monaghan set out to create a strategy for the food sector. The objectives of this strategy formation were as follows:

- **To review the current sector and devise a strategy for the maximum benefit of all food stakeholders.**
- **To act as a support to food development work by LEO Monaghan and Monaghan County Council.**
- **Increase food innovation and new product development, particularly through the utilisation of The Food Incubation Centre in Ballybay and research centres locally.**
- **Increase consumer awareness of locally produced food.**
- **Promote inter-food company networking and communications.**



METHODOLOGY

Following a tender process James Burke & Associates were appointed to formulate the food strategy for the Monaghan region. The key steps taken were:

- **Group stakeholder meetings**
- **Face to face and telephone interviews**
- **Engagement with various state agencies who have an involvement in food**
- **Desk research on domestic and international food initiatives**
- **Review of the current state of the Monaghan food sector**
- **Identification of areas of competitive advantage for the region, SWOT analysis and identification of challenges**
- **Analysis of food industry trends**
- **Identification and screening of opportunities**
- **Analysis of Monaghan opportunity gaps**
- **Strategy development formulation**
- **Benchmarking and formation of recommendations**
- **Creation of implementation plan**



5 PHASES

The project was broken into distinct phases which allowed for a structured approach.

PHASE 1

Understanding the brief & current landscape

PHASE 2

Food stakeholders meeting

PHASE 3

One to one interviews & group stakeholders meetings

PHASE 4

Desk Research

PHASE 5

Strategy write up



5 THE CASE FOR DEVELOPING A MONAGHAN FOOD STRATEGY

As will be evidenced throughout this report, Monaghan has a unique food landscape with some of the largest food producers in Ireland within the region operating side by side with a relatively small number of innovative artisan producers.

In the foodservice sector, new and exciting café and restaurant formats are emerging to complement the existing establishments. Some have already been recognised for their culinary excellence by award schemes. The food retail environment is typical of most counties with a small core group of passionate retailers supporting local produce and the larger multiple retailers, some of whom - like SuperValu, through their Food Academy Programme - have initiatives to support local producers.

These food producers, food retailers and foodservice operators are complemented by food festivals, food training programmes and some food tourism initiatives.

In isolation all of the above are effective, but each operates in a “silo” with potential disconnects to other food stakeholders. This food strategy attempts to link all the positive aspects of Monaghan’s food world through one unified vision.



5.1 STRATEGIC OBJECTIVES

The rationale for creating a food strategy for the region aims to achieve the following objectives:

- **To set direction and priorities for the development of the food sector**
- **To simplify decision making in relation to food in the county**
- **To drive alignment among all Monaghan food stakeholders**
- **To communicate the message to ensure there is one co-ordinated strategic journey for the Monaghan food industry**
- **To create a co-ordinated approach among local and national government agencies connected with the food sector in order to maximize the benefit to Monaghan food stakeholders**
- **To improve the marketing and promotion of Monaghan regional food products**
- **To create greater awareness at local level of Monaghan produced food**
- **To strengthen education and upskilling supports for the local food community, large and small**
- **To foster food innovation and create an environment for world class idea generation**
- **To create an environment which promotes job creation and employment opportunities in the Monaghan food sector**
- **To develop a clear role for food in tourism within the region**
- **To support the delivery of the Government's vision for food contained in Food Wise 2025 (Ref: Appendix 4)**

6 EUROPEAN FOOD & DRINK SECTOR OVERVIEW

Within Europe, the food and drink (F&D) sector is a critical cohort, and is recognized as an important strategic sector for overall EU commercial development.

Some key facts are:

- F&D turnover within the EU is €1,048 billion. This represents the largest manufacturing sector in the EU (14.6%)
- The F&D sector employs 4.2 million people and is the leading employment sector in the EU (15.5%)
- The sector is fragmented with 286,000 companies within it
- SMEs in the sector represent 51.6% of all F&D turnover, and 64.3% of F&D employment
- The EU F&D industry is diverse with a variety of sectors ranging from meat processing to dairy production and drinks
- The top five sub sectors (bakery products, meat sector, dairy products, drinks and “various food products category”) represent 75% of the total turnover
- Germany, France, Italy, The UK and Spain are the largest EU F&D producers

7 IRISH FOOD & DRINK SECTOR OVERVIEW

In 2015, the Irish food and drink sector recorded its 6th consecutive year of growth in exports, which currently stand at €10.8 billion, a year-on-year increase of 3%. The export value of Irish food has increased by 51% since 2009. The agri-food industry employs 163,000 people and F&D enterprises in the country account for €26 billion in turnover.

Worldwide economic growth means that as people's income increases, not only can they afford more food, but the type of food they choose also changes. Developing world's diets are "transitioning", or being 'Westernized', leading to increased worldwide demand for protein based food. This provides new markets for Irish producers as Ireland is a leading producer of dairy protein, seafood and livestock.

The UK is Ireland's leading export market with 41% of all Irish F&D exports going to the UK. The key emerging markets for Irish F&D around the world however are China, South East Asia, the Middle East and Africa. Ireland is well positioned to produce food for these emerging markets that is sustainably produced, naturally produced and healthy. Ireland currently exports 80% of food produced on the Island. This means that producers are constantly exposed to international prices and currency exchange volatility. Therefore, it is a crucial part of the agri-food industry that Ireland maintains and improves its international competitiveness.

In the meat and dairy sectors, Ireland retains a comparative advantage due to the sustainable, grass based production system which incurs low feed costs. Ireland also has many globally recognized education institutions which aid the agri-food sector's science, business and innovation based research and development. Given the many institutions, the industry is supplied with fresh, young, and skilled graduates who contribute to improving the industry every year. Despite being very competitive in many areas, Ireland is less competitive in others. For example, the Netherlands, Norway, Scotland and New Zealand are more competitive than Ireland in the seafood sector.

At the farm level, price and income volatility exists with the industry relying on EU subsidies to a great extent and acting as price takers from the Multiple Retailers. Ireland therefore needs to focus on improving farm profitability by managing input costs, production efficiency, new product development and innovation.

8 GOVERNMENT FOOD STRATEGY OVERVIEW

A number of government agencies have formulated food strategies covering the main F&D sectors which are overviewed below.

8.1 Food Wise 2025

The Food Wise 2025 strategy aims to ensure that the agri-food sector maximises its contribution to economic growth and exports in an environmentally stable way. Extracts from Food Wise 2025 include:

- **Improve capacity of Agri-food companies to absorb research and innovation output from research bodies**
- **There is a need to provide ongoing training to all producers to ensure that at each stage of development of the primary producer businesses, the appropriate skillsets and knowledge are applied**
- **Improve coordination between Industry, State Agencies and Research Institutions to support the delivery of research which will deliver commercial outputs and products**
- **Ireland's success in added value sectors such as farmhouse, artisan and higher end cheeses and butters will continue to be recognized, developed and encouraged**
- **Assist development of new industry entrants by structured knowledge transfer systems including mentoring, training and skills transfer**
- **Expansion of the Dublin Food Chain initiative to other cities**
- **Increase the opportunity for successful meet the buyer occasions**
- **Create a pipe line of companies growth beyond artisan/small food business definition via the introduction of both bespoke 1:1 and group multi-level supports**
- **Creation of civic and festival markets in our major cities and towns**

8.2 FÁILTE IRELAND FOOD TOURISM ACTIVITY PLAN

The Fáilte Ireland food tourism vision, as set out in their Food Activity Plan 2014-2016, is:

“Ireland will be recognised by visitors for memorable food experiences which evoke a unique sense of place, culture and hospitality.”

Other extracts from this plan include:

- **Food makes a significant contribution to the overall visitor experience and food offerings must respond to clearly defined expectations**
- **Compelling stories must lie at the heart of all experiences**
- **Food tourism operators must focus continuously on three dimensions to ensure that what they offer to visitors has the potential to create a lasting memory**
 - **Product: offering an authentic, high quality core product that is rooted in the locality**
 - **Stories: defining and communicating compelling stories that create a sense of uniqueness**
- **Service: providing world class service standards but with genuine Irish hospitality**
- **Stories and products are interwoven to really differentiate the food experience**
- **Product and service components are aligned to create real value for visitors**

9 OVERVIEW OF THE MONAGHAN FOOD & DRINK SECTOR

The Monaghan food and related sectors are a major contributor to the “national food basket” in terms of its outputs and ensuing local micro food economy. Some key statistics:

9.1 ACCOMMODATION & FOOD SERVICE:

- Numbers employed in the sector in Q1 2014 stood at **1,773**
- The gross annual wage bill paid to those employees is **€41.0m**;
- The net annual wage bill paid to those workers is **€37.0m**;
- The contribution to the Exchequer from employee taxes (PAYE & USC) is **€4m**;
- The Employer PRSI contribution is **€4.4m**

(Ref: Appendix 4)



9.2 FOOD PRODUCTION

Agriculture and food production accounts for over 60% of Monaghan's employment. 90% of the food produced in the county is exported. The food sectors are well represented and include the following:

- Dairy and infant formula
- Poultry and eggs
- Red meat
- Mushrooms
- Water
- Value Added and Convenience Foods
- Meal Feedstuffs
- Food Laboratories
- Food Services – transport, distribution and temperature controlled warehousing

The estimated turnover of food processors in the county is €800 million or 5% of national output.

9.3 FOOD EMPLOYMENT

Food companies account for 9 of the top 10 employers in the county of Monaghan.

1. Manor Farm (Carton Bros)
2. AIBP Beef
3. Kerry Foods (Rye Valley)
4. Kepak Limited
5. LacPatrick Limited
6. Monaghan Mushrooms
7. Silver Hill Foods
8. Combi Lift Limited
9. Mallon Foods
10. Tieraneill Mushrooms

Extract from Monaghan Business <http://www.monaghanbusiness.com/index.php/2-uncategorised/41-food-production> and Publication "More to Monaghan"

9.4 TRACK RECORD

County Monaghan's record in the agri-food sector makes it an ideal location to choose to do business as it offers:

- Experience in food processing and production
- A diverse range of product manufacturing
- Family and local inputs into the production process
- A supply of good food processed to international standards
- The existence of major international companies operating efficiently in County Monaghan means the county has a credible track record
- A range of support services in the county

9.5 LEVELS OF ENTREPRENEURSHIP

The most recent statistics available on Monaghan at the time of writing indicate that the county has a significantly higher rate of entrepreneurship than other regions.

As at 2011, Monaghan had
a population of
60,423



People at work in
Monaghan
23,005



Employers or own account
worker (owner managers)
4,907



Entrepreneurship as a % of
workers – **21.33%** versus
16.95% for the State average

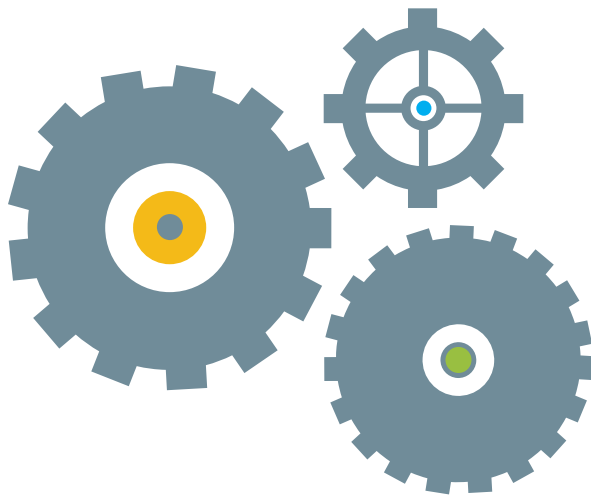


10 MONAGHAN LOCAL PLANS

There are several local plans which have already been launched within the region which aim to boost economic success across all sectors. Those where food is mentioned include:

10.1 MONAGHAN LOCAL ECONOMIC AND COMMUNITY PLAN (LECP)

In addition to the 4 economic goals under which actions in the Monaghan LECP are derived, the strategy seeks to include all relevant industry sectors which include agriculture and food.



Monaghan LECP includes the following Strategic Objectives and Recommendations.

Under objective 1.2,

“Marketing Monaghan as a centre for excellence for industry and entrepreneurship”

the plan recommends:

- *The development of a new Monaghan brand*
- *The implementation of a marketing campaign*
- *Agency collaboration*

Under objective 2.5,

“Provide targeted up-skilling and training for Farmers”

the plan recommends:

- *Identify training and up-skilling required by the farming sector*
- *The development of training programmes to support economic opportunities*

Under objective 6.3,

“Enhance contribution of tourism to the rural economy”

the plan recommends:

- *The expansion of trails, festivals*
- *Launching a county tourism brand*

10.2 MONAGHAN TOURISM STRATEGY 2015 – 2020

This strategy focuses on the wider development of tourism within the region but includes specific reference to food opportunities:

- Food producers are a strong sector in terms of economic development - develop this niche
- The restaurant sector scored high levels of satisfaction in the Tourism Survey so this may be an opportunity to encourage accommodation and other tourism providers to work more closely with restaurants in the future
- Develop a County Brand
- Assist Festivals and events to increase numbers
- Create a Calendar of Events
- Develop networking among trade and encourage cross-selling



11 SWOT ANALYSIS

Following the stakeholder consultation process and desk research, the following SWOT analysis was conducted. The areas identified in this analysis table will be used to underpin the strategy formation later in the report:

STRENGTHS

- Existing strong cohort of large agri-food businesses
- Positive image of Monaghan as an unspoilt 'green' agri food production destination
- Internationally renowned Monaghan food and beverage brands (B2B and some B2C)
- Diverse mix of chicken, beef, pork, duck, egg, mushroom, milk, added value food, beer and other products
- Good logistics proximity to Dublin and Belfast
- Potential stop-over point for tourists between Dublin and Donegal
- Entrepreneurial and hardworking population – the “Can-Do” County (Higher level of entrepreneurship than national average)
- Strong interest from food stakeholders in embracing the food strategy (evidenced during the research phase of creating this strategy)
- Emerging award-winning destination dining and accommodation venues
- Positive Monaghan image for its fishing lakes, golf, and other activities

WEAKNESSES

- Lack of a county vision/strategy to guide the food journey
- Lack of networking among food stakeholders
- Fewer small producers than other regions
- Shortage of production labour and chefs
- Under developed “food in tourism” opportunities
- Lack of Monaghan wide food marketing campaign
- Few food tourism visitor experiences e.g. producer facilities open to the public
- Missed opportunities by some foodservice operators to highlight Monaghan food provenance on menus
- Cost competitiveness challenges in some categories
- Skills gaps in local workforce - capability and availability in some sectors
- Access to finance especially for the small to medium producers (similar to other counties)
- Limited, but emerging, speciality food retail outlets
- Lack of cohesive planning and marketing of farmers' and food markets
- Lack of up to date statistics and data on Monaghan Food Companies, exports and employment

OPPORTUNITIES

- Growth in demand for new products associated with latest consumer trends
- Wider Green/Sustainable Reputation of Irish foods (origin green)
- Further Monaghan food exports
- Expansion of the Monaghan food in tourism offer linked to Ireland's Ancient East Initiative
- Development of a food innovation hub (in the Ballybay Food Innovation Centre)
- Creation of a regional food educational centre of excellence
- Harnessing Ballybay Food Enterprise Units
- Strengthening and supporting the Taste of Monaghan event
- Greater inter-agency collaboration at county level and regional level
- Working with other neighbouring counties in the East Border region and surrounding regions
- Identification of local food leadership champions/ambassadors
- Development of a food focussed marketing message for Monaghan
- Establishment of a Food Network
- Creation of a brand that could be collectively used by a Monaghan Food network
- Increasing co-opetition between large and medium/small producers within the county
- Establishment of an active restaurant promotion subgroup
- Potential to link Monaghan's extensive calendar of non-food festivals with food
- Potential synergies between the Artisan Food and craft sector
- Funding opportunities to be explored e.g. LEADER, CEDRA
- New Rural Affairs Department may provide additional opportunities for Monaghan

THREATS

- Low-cost import competition threat to larger producers
- Perceived higher cost of using local produce/foods among some foodservice operators
- Failure to secure buy in from food stakeholders for this strategy
- Failure to differentiate the region's food offer to the tourist
- Lack of funding to drive the food strategy
- Inability to get collective local agencies to adapt and support the food strategy
- Increase in net emigration
- The implications of Britain's decision to leave the EU
- Accommodation of the work force for the food sector can be challenging

11.1 COMPETITIVE ADVANTAGES

Monaghan has some very strong advantages over other regions in relation to its food businesses. The top advantages include:

1. The expertise of its combined business owners/executives is broader than most other regions
2. Monaghan as a region has a reputation with domestic and international trade buyers as a quality food producing region
3. The levels of food innovation within the food production industry supersede other counties partly due to the number of large operators (the report states above that Monaghan people are by nature more entrepreneurial than in other counties)
4. The cash investment in food facilities, food supply chains and the visionary nature of many of Monaghan's larger food producers is unique within a small geographical area
5. The service industries which support food producers are at a more developed level in Monaghan e.g. chilled storage facilities
6. A skilled agri and food production workforce exists
7. While many regions lack food incubation/development facilities, Monaghan has a superb unit in Ballybay suitable for either those food companies at an early stage, or those needing to expand kitchen space to support product development/pilot production
8. The existing base of non-food festivals and events suitable for partnering with food initiatives is significant
9. Proximity to Northern Ireland and the regions position on a major inland road artery between Dublin and Donegal is a distinct advantage. However, the positive impact of proximity to Northern Ireland may be diluted by the UK'S decision to leave the EU.
10. The green and natural nature of some of Monaghan's tourist products such as golf and fishing are a potentially strong marketing tool

In summary the competitive advantages can be covered by the umbrella areas of:

- Strategic Inland location
- Landscape/natural resources
- Leadership in food manufacturing
- People
- Innovation

11.2 CHALLENGES

Like all regions, there are equally challenges which need to be addressed. These are all potential opportunity areas. The key challenges include:

1. **Poor recognition of the Irish consumer even within County Monaghan itself of Monaghan's food credentials**
2. **Limited marketing of the region and its food stories with one unified message**
3. **Limited networking between food stakeholders**
4. **Slower rate of food producer start-ups than other regions**
5. **Underdeveloped food tourism "product"**
6. **Underutilised and under promoted Ballybay Food Innovation Centre**
7. **Absence of a local food champion/ambassador who would act as a leader and driver of the food community**
8. **Lower level of food activity and events when compared to other counties**
9. **Little evidence of inter-agency food focussed activity which has led to well intentioned, but isolated initiatives**
10. **The education strategy for producers and foodservice operators is under developed**
11. **While innovation is good amongst many larger producers, achieved through in-house resources, there is no regional innovation platform**

In summary the challenges can be covered by the umbrella headings of:

- **Collaboration**
- **Networking**
- **Promotion/Marketing**
- **Education**

12 INTERNATIONAL FOOD STRATEGIES

In order to see what is possible for Monaghan, international best practice in the food sector was bench marked and links to some of these initiatives can be seen in Appendix 4.

Full recommendations are contained later in the report.

13 MONAGHAN FOOD STRATEGY GUIDING PRINCIPLES

Following a strategic analysis of all the facts above, the following were identified as guiding principles for the food strategy. These should be viewed as a framework to guide the implementation.

AWARENESS & COMMUNICATION



Foster stakeholder networking



Develop a food Activity Calendar



Be a food destination for tourists

EDUCATION & INNOVATION



Develop Ballybay Innovation Centre



Become food innovation leaders



Create a regional food education hub

14 RECOMMENDATIONS

14.1 AWARENESS/COMMUNICATIONS

14.1.1 FOSTER STAKEHOLDER NETWORKING

The value of stakeholder networking and “co-opetition” has been outlined above.

In addition to the recommendations which impact on stakeholder networking included in the guiding principles already listed, this report recommends the following actions:

- **Set up a County Monaghan Food network to include high level/ innovator clusters such as the industry leaders at 9.3 above as well as foodservices and artisan producers. A number of Network events could include:**
 - **Increase mutual awareness of Network members’ business activities and markets**
 - **Explore opportunities for possible joint ventures between Network members – these could include joint marketing/awareness development activities**
 - **Explore the possibility of joint or complementary Research and Development activities**
 - **Increase awareness of the availability of the range of local produce to foodservice businesses**
 - **Encourage foodservice businesses to use and highlight the use of local produce on their menus**
 - **Share and learn from the experience of other businesses within their growth path**
- **Create an online directory of local suppliers at all levels for access by industry players, food retailers and consumers**

Consideration should be given to creating a local Monaghan umbrella food brand for this network. This brand could ultimately be used as a local food symbol. The creation of this food brand should be mindful of other wider Monaghan brand work which is currently under consideration.

14.1.2 DEVELOP A FOOD ACTIVITY CALENDAR

The Boyne Valley region with its Food Series model is regarded as being the benchmark for stimulating food promotional activity within a geographic area. It has achieved acclaim for the number of activities it runs and its ability to successfully promote local food (Ref: Appendix 4).

The core principle is based on creating a calendar of activities with individual events run by various food stakeholders and which is promoted as part of a wider food series marketing platform thus creating a mechanism to celebrate local food stories. The target audience is both the local public and visiting tourists.

Actions could include:

- **Develop a food series committee to organise a calendar of food events**
- **Host flagship events such as a strategically reviewed “Taste of Monaghan” Festival**
- **Create centrally managed food series marketing materials**

Events should be led and run by Monaghan based food businesses and strict qualification criteria should be in place. For example, such events should be:

- **A celebration of local produce**
- **Primarily food & drink related event**
- **Local, community orientated**
- **Unusual or different/novel concept**
- **Highlight provenance - origin and authenticity**
- **Story behind/about event or person behind the event**
- **Unique experience offered**
- **Pairing or working with other Monaghan food stakeholders**
- **Encourage and embrace co-opetition and collaboration where possible**

14.1.2 DEVELOP A FOOD ACTIVITY CALENDAR

The calendar should umbrella all existing food activity and encourage new local food initiatives. It should not be viewed as solely food festivals or one-off events but rather a rolling celebration of Monaghan food and drink products. It will also have a clear ability to extend the tourist season beyond its traditional dates. Of particular focus should be combining food at what might be normally non-food events.

- **Beer and local food pairing event at a local brewery**
- **Long table harvest festival**
- **Monaghan food safari**
- **Midsummers night candle lit supper with local food**

14.1.3 BE A FOOD DESTINATION FOR TOURISTS

14.1.3.1 PROMOTION OF LOCAL FOOD TO THE TOURIST COHORT AND RESTAURANT COLLABORATION RE LOCAL PRODUCE

It is recommended that food in the tourism product be integrated with the wider Monaghan tourism strategy to promote local food to the tourist cohort.

As mentioned earlier, Monaghan has many tourist attractions through golf, fishing and other activities. Through the food series, already covered, there will be lots of opportunities to showcase Monaghan food to the tourist sector. The additional showcasing of local food through increased restaurant collaboration will also help enhance the tourist offer. This report also recommends that the following steps be taken to enhance the “food-in-tourism” experience:

- **The development of one or more food trails throughout the county**
- **The recruitment of local “food ambassadors” whose brief will be to showcase Monaghan food at national level**
- **The development of new food festivals celebrating local produce e.g. The Monaghan Duck Festival**
- **The creation of a fact sheet of “stories” behind local food provenance which will facilitate serving staff with the retelling of these stories to diners and tourists**

14.1.3.1 PROMOTION OF LOCAL FOOD TO THE TOURIST COHORT AND RESTAURANT COLLABORATION RE LOCAL PRODUCE

- **The encouragement of open farm visits e.g. “farming Saturday” where farms open their doors to the public one day per year**
- **Encouragement of food producers to develop visitor centres through the availability of grant aid for such developments**

Throughout the creation of this strategy document there has been significant interest from the café/restaurant sector to work together on more initiatives.

The Detroit Food link provides an example of restaurants working together to promote food from their local region. Restaurants are working with local farmers from the environs of the City and State to promote locally grown food (Ref: Appendix 4).

This report recommends areas for collaboration for Monaghan restaurants, cafes and hotels include the following:

- **Link the actions and events identified by restaurants to the Food Series calendar which will act as a marketing platform**
- **Create a dedicated “Dining in Monaghan” website**
- **Secure buy-in from all Monaghan restaurants to showcase local farmer and producer provenance on menus**
- **Create an accreditation/recognition system for restaurants which will allow restaurants sourcing from more than 5 local farmers/producers to display a symbol on their menus et which acknowledges their support for local food.**
- **Consider the following as events suitable for promoting local food**
 - **An outdoor long table dinner on street celebrating local food, where 4 or 5 restaurants would combine to feed 100 diners at one table**
 - **3 restaurants on one street rotating diners over the 3 courses**
 - **Create packages for hotels and B&Bs which incorporate local food experiences as part of the offer e.g. weekend break including a visit to two local artisan producers**
 - **Up-weight seasonal items as a mechanism to draw attention to local ingredients**
 - **Organise a dedicated week each year themed as a celebration of locally sourced ingredients**

14.1.3.1 PROMOTION OF LOCAL FOOD TO THE TOURIST COHORT AND RESTAURANT COLLABORATION RE LOCAL PRODUCE (CONT.)

- **Publish a “Food from Monaghan” cook book with recipes donated by local chefs using local ingredient**
- **Develop an “outreach” food programme which would see chef talks at local schools to the transition year classes. This can be linked to the Taste Council Transition Year Artisan Food Programme**
- **Partner with local radio and print media to run a campaign celebrating local food and local restaurants**
- **Invite producers and farmers into restaurants to meet diners as part of “meet the maker” evenings.**
- **Organise training sessions for front of house staff to increase their awareness of locally sourced food**
- **Ensure all chefs are aware of all available local sources for food and ensure participation in the local trade buyer/meet the maker event mentioned as part of the food network section**

14.2 EDUCATION/INNOVATION

14.2.1 CREATE A REGIONAL FOOD EDUCATION HUB

It is recommended that a Monaghan based educational food hub be set up to support the following stakeholder groups:

- **Large food producers**
- **Artisan producers**
- **Start-up food entrepreneurs**
- **Food service operators including cafés, hotels and restaurants**
- **Food tourism venue operators**
- **Food market operators and stallholders**
- **Farming and agri related businesses**

14.2 EDUCATION/INNOVATION

14.2.1 CREATE A REGIONAL FOOD EDUCATION HUB

Recommended actions are as follows:

- **Take regional approach to education/training rather than county**
- **Where possible, use Ballybay Food Innovation Centre as a venue base for courses**
- **All agencies participate in educational/training programme content building**
- **Create educational content which will enhance sector competitiveness in partnership with experts in this area**
- **Develop education programme to underpin agricultural system**
- **Run an annual calendar of product specific technical courses**
- **Provide talks/induction programmes to local groups and clubs**
- **Allocate budgets to encourage food start-ups**
- **Support the food in tourism and foodservice sectors with chef training and other programmes**
- **Explore funding opportunities**

14.2.2 BECOME FOOD INNOVATION LEADERS

As identified in the SWOT analysis, individual Monaghan producers have significant innovation taking place. The landscape however is uneven with some businesses having less innovation resources. To complement the current innovation strengths, it is recommended that the following additional resources be provided so that the region can become the largest hotbed of food innovation in Ireland:

- **Partner with a third level food innovation facility who will act as a lead in setting out an annual innovation calendar of activity in consultation with local food businesses.**
- **Once per year bring in global food trend experts, in consultation with Bórd Bia, to run a “hot house” innovation seminar for those in the Monaghan food production sector**
- **Take a group membership of one global trend newsletter and allow all Monaghan producers to access**

- Many of the larger producers have peripheral innovation projects which cannot progress due to space or time constraints. Facilitate introductions of these projects to local food entrepreneurs through an “innovation matching service”
- Organise one study trip for restaurant owners per year which will focus on menu innovation
- In consultation with Bórd Bia and Enterprise Ireland, identify import substitution opportunities
- In consultation with local foodservice chefs and owners, identify import substitution opportunities and products which could be produced locally which are currently simply not available
- Create a bursary to be awarded to two small food producers to undertake innovation projects, possibly utilising the Enterprise Ireland Innovation Voucher model

14.2.3 DEVELOP BALLYBAY INCUBATION FACILITY

The Ballybay Community Kitchen is a single unit of 1,000 square feet. This has been fitted out as a ‘Test Kitchen’ in a response to a need identified in a study carried out by LEO Monaghan among food producers within the county. Partial funding for the Test Kitchen has been allocated through Cavan Monaghan Rural Development (LEADER), with matched funding from Enterprising Monaghan. The Community Kitchen was opened as part of the Phase 2 Extension of Ballybay Enterprise Park in March 2015.

The 1,000-sq. ft. Kitchen offers the following:

- Food start-ups a top-grade kitchen facility that allows early stage food businesses to research and develop their products in a professional, commercial environment with minimal financial risk
- Larger businesses can avail of the facility for new product development, diversification and R&D purposes
- Training agencies/businesses can avail of the 12+ teaching workstations to cater for food training programmes
- Events and functions facility for Caterers

14.2.3 DEVELOP BALLYBAY INCUBATION FACILITY

Recommendations for the further development of the Ballybay Community Kitchen are as follow:

- Develop the kitchen area to allow for more commercial food production
- Develop additional areas such as training and meeting rooms
- Increase funding to recruit Centre/Business Development Manager
- Introduce marketing campaign to increase awareness of the facility within the county and nationally
- Promote the use of the facility for existing and new food related initiatives and programmes to establish it as the centrepiece of County Monaghan food initiatives

For further research on domestic and international kitchens, please see Appendix 2.

15 STRATEGY ENABLERS

To ensure that the above guiding principles and actions are activated, it will be essential that the following are in place:

- A steering group made up of 15 active food stake holders whose role will be as follows:
 - To attend four steering meetings per year
 - To take responsibility for managing and organising at least one event per year
 - To be a voice for the Monaghan food strategy within their own sector
 - To foster the growth of Monaghan food at every opportunity
- That sufficient funding be put in place to deliver the actions
- That inter agency collaboration and interaction be mandatory
- That a food facilitator be put in place for 3 years to support the delivery of the strategy. The role of the facilitator will be as follows:
 - To ensure the guiding principles and outputs are actioned
 - The act as a facilitator between the various agencies, food producers and other stake holders
 - To provide updates on progress in accordance with the time lines set out
- That the Local Authority endorse the strategy and incorporate it into their wider plans

16 APPENDIX 1 DOMESTIC AND INTERNATIONAL KITCHENS

The following contains information on various kitchen models throughout the world which will help influence future initiatives with the Ballybay Enterprise Centre.

Incubation Kitchens allow for a more independent operation with the producer having more control over their production. The producer usually rents out the facility on a fixed term basis; perhaps a 6-month operation or even just 4 weeks depending on the stage of development of the product and its viability status. When the producer rents out the facility, he/she is given the key to the property and can come and go as they wish. When incubation kitchens come in the form of multiple units, they are either separated by a wall into separate units or else inclusive into a large area with the different incubation areas destined for different production operations for different people.

Community Kitchens on the other hand are open to the public on a daily basis, given that the whole day isn't scheduled to be filled by different producers. Producers rent out the kitchen unit, generally in a facility such as a community hall, and pay by the hour. They are usually rented out in short time slots of 1-3 hours. Consultancy is usually readily available also in the facility for those who seek practical advice for their operation or directory advice for their local area.

A food hub is a business or organization that actively manages the aggregation, distribution, and marketing of source-identified food products primarily from local and regional producers to strengthen their ability to satisfy wholesale, retail, and institutional demand. Food hubs provide a timeshare production kitchen where a number of producers schedule different timeslots to accommodate their operations. In most cases, business support such as business mentoring and consultancy are provided at most food hubs. A food hub supports local produce and acts as an affordable means to creating a food network. Food hubs vary in size to accommodate the needs of the food producer. Smaller production base units are retained for entrepreneurs who are just starting out and producing at a small scale, and the larger units are destined to be at the disposal of existing businesses who demand cost effective, greater production capacity as their sales volumes increase. Food hubs are generally:

- **For small scale use, 600 sq ft units generally suffice**
- **For medium scale use, 1,200 sq ft units generally suffice**
- **For business scale use, 2,800/3,100 sq ft units generally suffice**

17 APPENDIX 2 NATIONAL AND INTERNATIONAL RESEARCH – INCUBATOR KITCHENS/HUBS

National Research

- **Kitchen Incubators Kerry (KIK):** This centre offers kitchen incubators to members of the public who are set to commence on food business ventures and existing business who are at their development stage and cannot afford costly construction expenses to build their own production kitchen. KIK offers confectionary kitchens and catering kitchens to rent out. Both kitchens offer 6 gas burners with a large oven, a 10-rack combi oven, a 20qt mixer, a blast chiller, refrigerator and freezer and plenty of counter top space. KIK won a JFC Award in 2014 for innovation.
- KIK is a 6,000 sq. ft. custom fitted space with 3 commercial kitchens, a demo kitchen and training and meeting space. The kitchens are rentable for only €15/hour. The next step for KIK is to get a subsidized food grade unit from an enterprise centre. This would provide business mentoring and administrative resources for the start-ups which would aid development of their businesses. The price for a month's licence would be around €400 and would include rates and waste management.
- **SPADE Enterprise Centre in North King St. Dublin** provides quality incubators also for people with ideas who lack in skills or funds to begin their venture. The kitchen incubators range in size from 400-1500 sq ft. The facilities include food grade, light manufacturing, office units and secretarial services. The head office houses 33 units, another 6 units are available in Oxmantown Lane, and 6 in Newmarket Square also.
- **Meath food hub** provides a timeshare production kitchen for low risk food production, e.g. jam making, preserving, bakery etc. and onsite culinary and food production training. Like any food hub or incubator kitchen, it minimises the risk of early business failure and facilitates innovation in every way.

International Research

- **Food and Drink Hub, Scotland** (www.foodanddrinkhub.co.uk) Scotland's affordable Wholesale Food & Drink Supplier provides a food hub for companies which are otherwise disadvantaged through scale. Beyond storage and sales support that the hub offers, it also offers business support such as business mentoring and consultancy.
- **Union Kitchen, Washington D.C.:** (unionkitchendc.com) This is basically a community kitchen facility that strives to build a profitable food system and make local produce scalable. It integrates its services of distribution, catering and consultancy to make local produce or move and sell existing local produce. Union Kitchen distribution establishes relationships with dozens of retail partners and brings Union Kitchen

17 APPENDIX 2

NATIONAL AND INTERNATIONAL RESEARCH – INCUBATOR KITCHENS/HUBS (CONT.)

member products to local and national outlets. By coordinating all distribution activities from post-production to fulfillment, Union Kitchen streamlines the distribution process for an easier, efficient, and more profitable model for the producer and retailer alike. The introduction of a Union Kitchen or something of a similar concept into Monaghan would provide the space for production and the opportunity for sales of local produce and would catalyze the growth of local businesses. Union Kitchen provides a large working space of 16,000 sq ft which is segmented into individual working units for different members who produce different food. Union Kitchen has 34 members and these members rent out the premises for whenever they need it.

- **The Starting Block, Michigan: (www.startingblock.biz)** This is a non-profit regional incubator kitchen and entrepreneurial center. It is a home for individuals who want to take a special recipe to market or create a food or natural resource business and they are a supporting regional economic development organization committed to small business development initiatives. The Starting Block provides entrepreneurs, producers, and processors properly equipped, licensed, and inspected food processing kitchens at reasonable rental prices without the initial investment in costly facilities and equipment. Once again, this is another example of a food incubator or community resource that supports local initiatives and does so in an affordable way for producers. This kind of resources are not just non-existing or lacking in county Monaghan, but nationwide also. In such a scenario, much of what is required to get such a beneficial resource up and running is community intention and cooperation. Perhaps some government agencies such as Enterprise Ireland could help fund any or some of the costs incurred in its startup.
- **The Starting Block incubation kitchen can vary in size and dimensions depending on the expected demand for its use. The original incubation kitchen consisted of:**
 - **A 2,500 sq foot commercial kitchen**
 - **30 clients on average**
 - **3 part time staff which proved sufficient to run the kitchen.**
- **Penn State Extension: (extension.psu.edu)** This is an educational network that gives people in Pennsylvania access to the University's resources and expertise. It helps individuals, families, businesses, and communities with information and a broad range of educational programs designed to ensure the long-term vitality of one's natural resources and to enable people to better understand and deal with complex public issues. The information 'extension' in Pennsylvania carries out workshops for next generation farmers.

17 APPENDIX 2 NATIONAL AND INTERNATIONAL RESEARCH – INCUBATOR KITCHENS/HUBS (CONT.)

- **Enterprise Australia Food Hub, The City of Casey in Victoria, Australia:** The main goal is to provide a ‘missing middle man’ for local producers. However, the project leaders carried out substantial research to assure themselves that this Food Hub would be worthwhile and most importantly a success. They set out by following the logical sequences below:
 - Investigate and analyse the specific market demand to make sure demand exists.
 - Develop a network of committed and engaged stakeholders.
 - Undertake a feasibility assessment.
 - Develop and strengthen the local food ecosystem that increases demand for locally and sustainably produced food.
 - Carry out a series of contacts and interviews to identify interested stakeholders and potential local leaders

One of the objectives of the Food Hub is to create better market outlets and fairer prices for producers. This will increase the viability of local farming businesses valuing the benefits of urban proximity.

This Food Hub is different in the sense that it approaches artisan production moderately and wisely, as they recognise that they must be commercially robust in order to achieve social objectives. The Casey Food Hub which is very health orientated is also targeting schools as potential collection points. Large institutions would be a great kick-start for such a new initiative as it would generate recurring and stable income as well as leaving room for potential employment growth of the Food Hub. Cafes and restaurants appreciate having a supplier on their back door and they could incorporate this into their marketing, which not only creates awareness of what is being produced locally but would also create a sense of local pride.

This Casey Food Hub will contain a drive thru, a sit-down area, a warehouse for storage of the food and a children’s play area. This is all part of an incorporated objective of encouraging the community to eat healthier and more nutritious food.

- **Intervale Food Hub, Vermont, USA: (www.intervalefoodhub.com)** This food hub allows its customers to order online and the companies

17 APPENDIX 2 NATIONAL AND INTERNATIONAL RESEARCH – INCUBATOR KITCHENS/HUBS (CONT.)

being featured from the local area in that week. This newsletter also includes recipes and cooking tips for the customers to explore new recipes using only naturally produced local ingredients.

Although Intervale offers a wide array of various kinds of foods, they also offer food bundles or packages

- The Oklahoma Food Cooperative (oklahomafood.coop) is a member-owned organization and is a marketing network of farmers, artisans, and customers and volunteers that work together to bring local food and products to the front door of its customers. The Oklahoma Food Co-op operates on a simple and inexpensive model that links regional producers directly with consumers through an easy to navigate website. Producers use the cooperative website to showcase their products and farms in a 'virtual farmers market'. Producers bring all the items bought online to a central distribution point, where their products are then packed into trucks by co-op volunteers and then delivered to its destination. The co-op offers not only meat, grains, and bread, to its customers but also processed and prepared foods such as casseroles, cheese, salsas, jams, yogurts and baked goods.

The model charges producers and consumers alike 10% per sale. One of the reasons this is such an interesting model is because it relies on volunteer staff and a low cost online platform with minimal start-up capital is required to get things up and running.

18 APPENDIX 3

INTERNATIONAL FOOD STRATEGY BENCHMARKING

Sustainability of the Agri-food sector:

- **Dutch Government Supporting Greater Farm Sustainability:** In December 2014 The Dutch government announced financial support for 13 projects aimed at improving agricultural sustainability, including for better grassland management, local feed production and an expansion of a welfare mark for pigs and poultry. This strategy aimed to support the country's livestock farming sector to make it more sustainable and animal-friendly.

Consideration: Although Irish agriculture is renowned for its sustainability, there is much use of artificial fertilisers, and in a place like Monaghan, there lies the potential to reduce these artificial fertilisers and retreat to a more organic soil replenishment such as manure and slurry on a pilot basis. This would make Monaghan producers more sustainable, cost effective and environmentally friendly.

Farmers' Markets

- **USDA Economic Research Service:** In the US, the USDA promotes and encourages local farmers' markets for economic reasons and health reasons. The Supplemental Nutrition Assistance Program (SNAP) is a nutrition assistance program administered by the USDA, to improve participants' food security and their access to a healthy diet.

Consideration: Local government agencies in the Monaghan area could invest time in promoting the benefits of shopping at local farmers markets in order to meet the producer face to face at the market and give back to the local community directly.

Education and Training for Food Producers

- **Toronto Food Business Incubator (TFBI):** The City of Toronto, Economic Development & Culture Division launched the Toronto Food Business Incubator (TFBI) in 2007 to support new entrepreneurs by teaching best practices of food production and helping to ensure that new and innovative products are continually being introduced to local consumers. Support was also offered for labour force education and training to ensure that Toronto processors were producing safe, secure and affordable food products with the assistance of government funding.

Consideration: This could form part of the Education and Training Pillar of the Food Strategy to support start-up food businesses in Monaghan and is further expanded in the recommendations section.

18 APPENDIX 3

INTERNATIONAL FOOD STRATEGY BENCHMARKING (CONT.)

- **Wales:** Regional areas of Wales have pioneering centres of excellence that act as ‘launch pads’ for innovative new ideas. Existing products can be improved upon or completely new products can be developed and tested. Expert teams of food technologists provide advice on nutrition, labelling, packaging, processing and manufacturing. This may involve taste panels or assessing the product relative to competitors.

Consideration: Monaghan region could link with a third level facility to provide these services. See Section 14 - Recommendations.

Teaming up with non-food events

- **Scotland’s Food Charter for Events:** 2015 was a year of many big events such as the year of the Homecoming and many other sporting events in Scotland. In partnership with the Scottish Government, Visit Scotland, EventScotland and Think Local, Scotland’s Food Charter for Events decided to take advantage of these non-food events to incorporate and offer a showcase of national produce through an event that turned into “Year of Food and Drink Scotland”. Scotland’s Food Charter realised that people buy food and drink with a story behind it and they really encouraged and embraced this. They also highlighted regional specialities and traditions.

Consideration: Monaghan could be opportunistic when it comes to non-food events. Anything that draws visitors to the area or gets locals out attending and exploring events is a great opportunity for local producers to get together to showcase what they have to offer. See Section 14 - Recommendations.

19 APPENDIX 4 **UNIVERSAL RESOURCE LOCATORS (URLS) OF INITIATIVES REFERRED TO WITHIN THE CURRENT STRATEGY DOCUMENT**

Food Wise 2025

www.agriculture.gov.ie/foodwise2025

FoodDrink Europe

www.fooddrink europe.eu

Monaghan Business

www.monaghanbusiness.com

Boyne Valley Food Series

www.boynevalleyfoodseries.ie

Detroit Food Loop

www.modeldmedia.com/features/DetroitFoodLoop

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