

# "Growing a Local Food Economy"



**The County Kilkenny Food Strategy 2010-2014**

**October 2010**



“Growing a local food Economy – County Kilkenny Food Strategy 2010 – 2014” was formulated by the County Kilkenny Food Strategy Group. This group is comprised of:

- Kilkenny LEADER Partnership: Lead Partner
- Kilkenny County Enterprise Board
- Kilkenny County Council
- Enterprise Ireland
- Kilkenny Industrial Development Company (KIDCO)
- Bord Bia
- Teagasc
- Fáilte Ireland
- Kilkenny Farmers’ Market
- Food Producer Representative
- Food Retail Representative
- Foodservice Representative
- Savour Kilkenny Food Festival
- Kilkenny Food Trail - A Taste of Kilkenny

Further information on the Strategy, contact:

Kilkenny LEADER Partnership  
8 Patrick’s Court  
Kilkenny  
T. 353 (0)56 7752111  
E. [info@cklp.ie](mailto:info@cklp.ie)  
W. [www.cklp.ie](http://www.cklp.ie)



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## Foreword

Food matters! How a county or region values the role of food businesses in its society is important. Not just as a public health issue or even as a matter of supporting primary producers- but for the multiple of social, cultural and economic benefits that grow from the development of an integrated strategy. Kilkenny LEADER Partnership (KLP) is delighted that this view was shared by so many of stakeholders in the sector. We believe that the resulting strategy 'Growing A Local Food Economy' will be a keystone in the coherent development of a food enterprise culture for Kilkenny and hopefully to other parts of the southeast region. As we wanted it to be a broad-based strategy, the process included interests from all parts of food production, retail and food-service sector. The willingness of parties, from small producers and retailers to local and national agencies, to meet, discuss, argue and eventually agree the outcomes was genuinely exciting for us. To take just one aspect, we in KLP see that the strong integration of food production and marketing within the tourism sector will be a key opportunity for all of County Kilkenny.

On behalf of KLP I wish to thank the many groups and individuals that gave of their valuable time and opinions to help shape the strategy. The openness and lack of preciousness on behalf of the various local development and statutory agencies was refreshing and crucial to the success of the process. A sincere thanks to them for that commitment. James Burke & Associates are to be commended for their great work in leading the entire process. Particular thanks are due to members of KLP's own staff involved in the project, particularly Gabrielle Carroll and Sharon Stone who ensured we had a completed strategy document ready for the publication deadline. Most of all a sincere thank you to all the food related enterprises in the county and beyond who willingly broadened their vision from the stressful day-to-day concerns of their own enterprises to make a contribution towards the common good. KLP will not be found wanting in meeting its commitments. We await the delivery of all outcomes with heightened anticipation - as we are confident that they will be delivered upon. They have to be; it's what we said we wanted!



Declan Rice  
*CEO*





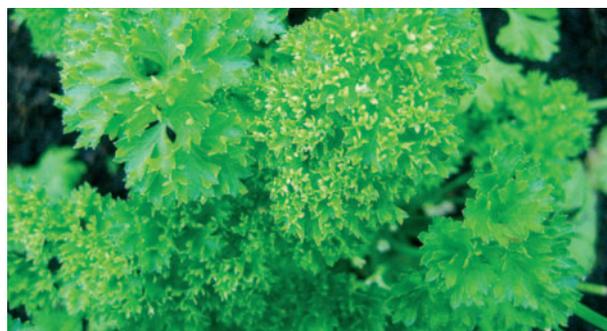
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# 1. Executive Summary

- Kilkenny currently hosts 40 micro and medium food producers with estimated combined turnovers of €15 million, 70 food retail outlets with estimated combined turnovers of €125 million and 139 establishments involved in food service /food tourism with estimated combined turnovers for food of €104 million.
- International research has shown that regions with a strong strategy for food are more likely to attract and retain successful food entrepreneurs. The Taste Council has predicted that artisan and speciality food businesses will double their turnover and employment in the next 10 years.
- Kilkenny LEADER Partnership originally set out a mission statement in 2009 aimed at establishing Kilkenny as a food showcase for Ireland.
- Education will play a major role in this strategy and the Kilkenny Artisan Food School is to be founded with the primary objective of developing long term education strategies within the county.
- Providing support structures for the food producers including the creation of a food producer network, the development of strategies to encourage food start ups, the linkage of all food schemes in the county and the coordination of financial assistance and support for the producers will all be vital elements of the strategy.
- Focused development of clear routes to market for producers commencing at local level by defining retail and foodservice channels right through to developing export markets will also play a pivotal role.
- Strengthening of the underdeveloped farmers' market network is also required.
- Consumer education and marketing through a process of creating "Local Food Heroes" and developing strong links with retailers, hotels and restaurants, etc. within the region will all help create a pull strategy for consumers.
- Strong interaction between food and the tourism sector will help position Kilkenny as a destination, together with further expansion of the roles of Savour Kilkenny Food Festival and Taste of Kilkenny Food Trail.
- Harnessing existing festivals throughout the county as a mechanism to further showcase local food will be necessary.
- While the initial strategy will be rolled out within Kilkenny county, it is envisaged that neighbouring counties will embrace the economic food model and that the strategy will move from a county based one to a regional strategy by first embracing areas of common interest like consumer marketing, farmers' market development and route to market planning.
- This strategy will fail in reaching its objectives if the correct financial resources and a Food Development Team are not put in place to implement the Strategy.



## 2. Introduction

This document sets out a strategy developed in County Kilkenny to initially grow its local food economy and then realise a regional economic food model. The core objective is to foster and support the development of the food economy within the region in a strategic way.

The document illustrates the rationale for undertaking this project, then logically makes a case for change and recommends a more coordinated approach to food development within the region. It is recommended that the development within the region will be supported by a multi agency network comprised of local agencies, national food agencies, key industry stakeholders and relevant interest groups working in collaboration.

The strategy was developed through a yearlong process, which travelled through distinct phases of primary and secondary research involving and centred on:

- Focus groups with consumers, growers and producers.
- Full feasibility study focussed on developing County Kilkenny as a major national food destination. This incorporated interviews with regional food groups and international research focussing on best practice standards.
- The development of a business plan on realising County Kilkenny as a major food destination.
- Formation of a Food Strategy Group within Kilkenny to input, critically analyse and contribute to the development of this strategy. Group meetings, one to one discussions and document reviews all formed part of this process.



## 3. The Case for Developing a Food Strategy

International research has shown that regions, which have formulated a strong strategy for food within their area, are more likely to attract and retain successful food entrepreneurs.

Significant research has been conducted in the Irish Artisan sector in recent years, which predicts strong growth in indigenous food production if the correct strategies are employed at national and regional levels.

### 3.1 Artisan food in Ireland

There are currently 800 food firms in Ireland. The majority of these firms are SMEs. Of these, approximately 350 are categorised as speciality food businesses (defined by Bord Bia as micro and small firms). These 350 firms generate between €100,000 and €3.5 million per annum. A study by the New Economic Foundation in London found that every £10 spent at a local food business is worth £25 for the local area compared with just £14 when the same amount is spent in a supermarket. That is, a pound (euro) spent locally generates more than twice as much income for the local economy. This means that the €472.5 million consumer sales value of output sold locally in Ireland from over 350 small, local and speciality Irish food businesses, results in €1.01 billion in total revenue back into local communities throughout Ireland.

It is projected that by 2020 the existing base of 350 artisan/speciality food firms could double their output at consumer prices and increase their market share of the local market from 3% to 6% resulting in 1,000 new jobs for the local economy per annum (REF: Taste Council July 2010).

The 350 small food businesses currently client firms of Bord Bia employ approximately 3,000 people. It is estimated that these firms, by doubling their revenue and market share over ten years, have the potential to increase their employment levels by one third, thereby

creating 1,000 new job opportunities.

### 3.2 Food Tourism

Food Tourism in Ireland is valued at €2.3 billion per annum (at consumer prices in 2008). This means that visitors spend €2.3 billion in Ireland on food and beverages. This figure is largely included in the foodservice market valued at €5.5 billion in 2008.

Kilkenny and the surrounding region is a significant tourist destination with potential to create strong food linkages. Local Food from an artisan/speciality food producer, farmer or fisherman translates into a story and experience for visiting tourists which is unique to Ireland as a place.

### 3.3 International Benchmarks

#### A) New Zealand

A relevant international example is the New Zealand food and beverage industry (FBI), which exports circa \$21.9 billion (€11.1 billion) per annum. This is €3 billion more than the Irish food industry, yet Ireland and New Zealand have similar population sizes of approximately 4.2 million. The FBI is made up of circa 1,900 food enterprises in contrast to Ireland with 800. The industry is highly concentrated and employs some 20% of the working population, directly and indirectly. One of the key learnings from New Zealand is that their food industry operates to a strategic roadmap, which is focussed on the producers' needs and ensuing they can assess the supports they require.



### *B) Heart of England*

Other more regionalised examples, that demonstrate the linkages between defined regional food strategies and strong economic outputs, include Heart of England Fine Foods ([www.heff.co.uk](http://www.heff.co.uk)). HEFF includes as elements of its food strategy items such as:

- Business support for food and drink companies.
- Route to market supports.
- Marketing Initiative.
- A team of experts dedicated to supporting the producers.
- Regional food coordination across the six counties.
- Organising food events.
- Facilitating regional communication between producers, retailers and hotels, restaurants, etc.

### *C) Italy*

In Italy, the Emilio Romagna region has successfully created regional /cluster models of producers which are comprised of a large number of small producers who work together to improve efficiencies and knowledge. (Ref. Enterprise Ireland 2010). These are also a good benchmark.

## **3.4 Irish National Food Vision....Food Harvest 2020**

The Irish Government's Food Harvest 2020 report recommends several strategies which should be adopted if successful food enterprises are to be developed. The report states:

*"The emergence of Ireland's artisan food sector, supported by growing consumer demand for speciality food products and a strong entrepreneurial spirit has resulted in a significant rise in the number of small food companies operating in Ireland. Most of these companies are owner managed, in many cases have a strong family basis, and produce a diverse range of products. The level of innovation evident in many of these companies can provide the seeds for the next generation of Irish food and drink offering. The artisan sector also offers the potential*

*to enrich Ireland's tourism, while in turn tourism can be a vehicle to enhance the image of Ireland and Irish food production internationally.*

*To build on the success of the artisan food sector to date it is recommended that Bord Bia, Department of Agriculture, Fisheries & Food and Teagasc work together with other departments and tourism agencies to:*

- *Encourage and support market-led food entrepreneurship from the early stages of development.*
- *Promote sustainable and locally embedded food procurement policies and systems.*
- *Promote and broaden the opportunities in including markets, for consumers and visiting tourists to purchase local food.*
- *Conserve and promote distinctive local food traditions at EU level and with bodies such as the Taste Council and Slow Food.*
- *Explore possibilities for mentoring by large companies to support artisan companies achieve market distribution and build their consumer base".*

Other recommendations from within the 2020 strategy, which should influence County Kilkenny's Food Strategy, are:

- Building partnerships for food producers and working collaboratively.
- Better utilisation of marketing expertise and mentoring programmes.
- A further development of farmers' markets and food tourism.
- Investment in consumer focused innovation and new product development.
- Encouragement of the development of high potential start-up food businesses.



## 4. Background

### 4.1 The Starting Point — The Local Perspective

By May 2009, the local food industry, particularly the artisan food sector in County Kilkenny was really coming to life. A number of initiatives had already taken place and others were operational at that stage.

These included:

- “Savour Kilkenny Food Festival” – Kilkenny’s annual food festival was entering its third year.
- “Create a Taste – Food Innovation Network” organised by Kilkenny County Enterprise Board (KCEB) began in February 2009 was underway. This involved a network of Kilkenny and surrounding counties food producers working together over a 9 month programme to create new products for their businesses. KCEB were providing mentoring and training assistance to food producers.
- Kilkenny LEADER Partnership (KLP) had secured the LEADER European Agricultural Fund for Rural Development (EAFRD) programme (2007 – 2013) for the County and identified ‘small scale food and beverage production’ as one of three key areas that it sought to develop and invest in as a means of developing the rural economy of Co. Kilkenny. KLP had, through the previous LEADER programme supported food producers through grant aid assistance and had continuously been working with food producers in developing various food events and opportunities.

- Kilkenny Industrial Development Company (KIDCO), a non profit taking company involved in the development of industrial units in the County, had undertaken a feasibility study which indicated there was demand for food incubation units, and KIDCO subsequently applied for and were approved financial assistance from Enterprise Ireland under the Community Enterprise Centre Scheme towards the development of food innovation units within Co Kilkenny.

Ireland’s recent history of economic growth created an environment where consumers’ range of tastes and experiences were broadened and there has been significant growth in the number of artisan food businesses nationally.

In Co Kilkenny, all of this work was taking place in a co-operative fashion, but with no specific strategic direction outlined. Cognisant of this, Kilkenny LEADER Partnership (KLP) under the EAFRD set out a vision to position Kilkenny as the leading food destination within Ireland. During the intervening 18 months the original vision (Page 9) has changed significantly due to the dynamic nature of the process it went through. It has been included to allow the reader to understand the initial embryonic thoughts, which have developed as part of the process.





## 4.2 Kilkenny LEADER Partnership Vision

The original vision from May 2009 was set out as follows:

*“Kilkenny Leader Partnership (KLP) aims to develop a strong ethos of artisan food production in County Kilkenny through the delivery of the European Agricultural Food for Rural Development Programme 2007 – 2013.*

*Its interest in the production and retail of high quality locally produced food in Co Kilkenny is central to its strategic plan under the Rural Development Programme for the 2007-13 periods. As a central part of that plan, the company proposes to develop an ethos and brand of quality artisan food production through the development of an integrated food centre in the County to include production, retail and training in the area of quality niche food production.*

*The concept is the combination of a number of key areas including:*

- *An attractive retail space for quality artisan niche food producers.*
- *A building, or a campus of buildings that combines a high specification food manufacturing/ processing centre for quality niche food producers.*
- *The provision of quality third level training in the niche food production sector.*

*The retail space would be designed as an attractive setting, to a high standard and be sympathetic to its rural environment. It is anticipated that the individual units would offer the potential for an ‘open-shop front’ set-up, which would facilitate an outdoor market atmosphere.*

*In addition, the retail area would face on to an open air space where additional ‘farmers’ market-type’ food or craft stalls could be accommodated to add to the ambience.*

*The costs of a standard food production space are significant and often pose an insurmountable barrier to small scale food producers establishing or remaining in rural areas. The KIDCO project will be supported by KLP in its development and the relationship between the two projects will be explored to provide for optimum benefits in realizing the entire project.*

*It is anticipated that the type of training offered will largely result in participants being job makers instead of job takers. The provision of appropriate training will enhance the project on a number of levels:*

- *Building the profile of the project.*
- *Attracting food entrepreneurs.*
- *Developing innovative products.*
- *Increasing the number of quality niche food producers in the region.*

*It is the combination of a unique food retail environment with a manufacturing environment and innovative training for food producers that would make Kilkenny County particularly attractive.”*

## 5. County Kilkenny Overview October 2010

Since May 2009 significant work has taken place strengthening existing food networks and creating new opportunities:

- Savour Kilkenny Food Festival is entering its 4th year and is set to deliver on a significantly larger scale festival than in previous years. This work is being supported by KLP through the EAFRD LEADER Fund
- The “Create a Taste – Food Innovation Network” programme organised by the Kilkenny County Enterprise Board (KCEB) was the catalyst for a number of local artisan producers developing their businesses but also has the legacy of a number of smaller scale producers working together on various programmes
- Trail Kilkenny (A non profit rural tourism development Company based in Kilkenny that creates and markets leisure trails for local and tourist markets and is supported by KLP) – Launched “A Taste of Kilkenny Food Trail” in the spring of 2010 as a result of the local food industry working together
- KIDCO has secured funding from Enterprise Ireland towards the cost of developing Food Incubation and Innovation units

### 5.1 Kilkenny Food Industry

An emerging food base already exists in Kilkenny and is

set out in Appendix 1.

Research was conducted on the number of producers in the region covering the annual turnover and the number of employees. Where producers were unable to participate in the research, estimates were utilised in these circumstances.

Current estimates, based on KLP research September 2010, indicate that there are 40 micro and medium producers in the County, with 90 employees and a combined turnover of €15 million.

### 5.2 Local Routes to Market

The target market for every food producer is the national domestic market, followed by the international export market. Appendix 2 and Appendix 3 set out the current local retail and foodservice channels, which indicate significant opportunities at regional level. There are over 70 food retail outlets in Kilkenny with an estimated combined food turnover of €125m annually, as well as 139 establishments involved in food service/food tourism whose estimated combined food turnover is €104 million annually. Both of these areas present as strong regional opportunities for producers as part of their route to market strategies and also present as platforms to educate their consumers about the importance of local food.



## 6. Feasibility Study



The feasibility study, which focussed on developing County Kilkenny as a major national food destination was concluded in January 2010. This was the first step in the process of developing the strategy from the initial vision set out by KLP in May 2009. Its purpose was to challenge the vision, research international models and develop a frame-work that would act as a basis for the development of the food strategy. The key findings of the feasibility study were:

- To position Kilkenny and the region as a leader in food, a robust food strategy must be developed by stakeholders within the sector covering items such as attraction of new food producers, training, the development of local 'hero' food producers, ongoing marketing and consumer education, etc.
- The strategy should have at its foundation the development of food incubation units, a community kitchen (a high spec commercial kitchen containing all key pieces of equipment which is rented for short durations to new producers who may not have their own premises or established producers who require additional facilities), and the development of production led retail food units.
- Education programmes to develop existing entrepreneurs, encourage new entrants, and create an awareness of the importance of local food amongst the public should be developed. The education work stream will be a vital component of the overall food strategy and will help support the long term viability of food producers within the region.
- To facilitate the education programme, the Kilkenny Artisan Food School should be created with the objective of driving the food education strategy.
- An interagency approach (local and national) is required to optimise the development of the sector. KLP is a likely lead partner for integrating all food strategy within the county and should be responsible for driving this agenda forward together with other agencies.



## 7. Strategy Development

Following the completion of the Feasibility Study, a strategy review group was formed in August 2010, with the objective to develop a regional based food strategy, which would help drive all food direction within the county until 2014. The Strategy Group was tasked with creating an action based plan for immediate implementation. KLP acted as lead partner within this process and the makeup of this Strategy Group was a cross-sector team comprising of the stakeholders as acknowledged on inside front cover.

### 7.1 Four Key Strategic Objectives:

The Strategy Group developed the County Kilkenny Food Strategy based on four core recommendations.

These are:

**1. The Development of Support Structures for Food Producers:** The provision of long term, structured support and education of Food Businesses and Food producers in particular

**2. The Development of Clear Routes to Market:** The identification of local, national and international routes to market and the provision of support for producers to achieve success in the relevant channels.

**3. The Development of Strong Consumer Communications:** The education of consumers within the region to understand the importance of locally produced food and to buy these products thus facilitating an economic model which will both contribute to the economy and act as a job creation source.

**4. The Regionalisation of an Economic Food Model:** Once established, to expand the regional Food Strategy into a broader regional based strategy covering neighbouring counties.

While the model is initially being rolled out in Kilkenny County, it has been developed with a view to it becoming a regional model, which transcends county boundaries and fosters inter-county food development within the region. Each element of this model will be expanded upon over the remainder of the document.



Figure 1 ( below ) sets out the County Kilkenny Food Strategy, which will underpin food development within the region to 2014 and beyond.

### 1. The Development of Support Structures for Food Producers

- A. The Development of an Education Strategy
- B. The Creation of a Food Producer Network
- C. Online Provision of Information on Financial Assistance and Support to Producers
- D. Online Linkages to Other Food Schemes
- E. The Creation of a Distribution Strategy
- F. Creation of Gap Analysis / Innovation Strategy
- G. The Development of a Strategy to Encourage Start-ups
- H. The Development of Retail Units
- I. The Building of Incubation Units
- J. The Building of a Community Kitchen
- K. Embracing Lean Manufacturing/Efficiency principles
- L. State Food Agency Working Group



### 2. The Development of Clear Routes to Market

- A. Develop Direct Selling Routes
- B. Create Export Channels
- C. Develop a Food/ Country Market/ Farmers Market Strategy
- D. Identify Foodservice/ Food Tourism Routes to Market
- E. Create Retail & Foodservice Affiliate Programme
- F. Identify Retailer Routes to Market



### 3. The Development of Strong Consumer Communications

- A. The Creation of a Marketing Strategy
- B. Creation of Local Food Hero Brand
- C. Development of Food Producers Online Marketing Plan
- D. Development of Tourism Links
- E. Linking of Cookery Schools of Consumers
- F. Development of a Social Inclusion Strategy
- G. Creation of PR Linkages to Local Media
- H. Communication through Existing Festivals



### 4. The Regionalisation of the Economic Food Model

- A. South East Counties of Ireland

## 1. THE DEVELOPMENT OF SUPPORT STRUCTURES FOR FOOD PRODUCERS

Food producers sit at the core of the Strategy and without developing a strong producer base all other elements of the Strategy have the potential to fail. While there are several elements to the producer strategy, its core element is based on ongoing education and development for existing and new producers. The key elements of the food producer strategy are:

### ***A) THE DEVELOPMENT OF AN EDUCATION STRATEGY - KILKENNY ARTISAN FOOD SCHOOL***

To ensure the long term viability of food producers it will be vital that a robust education/continuous development strategy is in place covering all aspects of food production from pre start-up companies to those with many years of experience.

All producer education programmes will sit under the umbrella brand of the Kilkenny Artisan Food School. This school will coordinate all educational activities for start-up and existing food producers within the region. It will base the provision of its educational services on a two pronged strategy by providing bespoke training programmes itself through a classroom environment based ideally at the Food Incubation Centre (or another location if the incubation centre does not proceed) and practical product training programmes delivered through use of the facilities of the community kitchen. It is clear that not all training and education can be provided at local level. Partnerships will need to be formed with all of the key national providers to ensure a complete spectrum of programmes is available. Other institutes and agencies, which will be partnered as part of the provision of an education strategy will be:

- U.C.C.
- Waterford Institute of Technology
- St. Angela's NUI Galway
- DIT School of Culinary Arts & Food Technology
- Bord Bia Vantage Programme
- Bord Bia UK Foodservice Export Programme
- Enterprise Ireland Foodservice Programme

- Teagasc Technical Food Skill Programmes
- National Food Centre Technical Food Skill Programmes
- BIM Seafood Development Centre

It is envisioned that at the commencement of the education strategy a training needs assessment will be undertaken of all current food producers within the region to establish their needs.

The vision for a dynamic food industry within the region will not be achieved without the implementation of the education strategy and the creation of the Kilkenny Artisan Food School to drive the project. This is the most critical element of the Food Strategy as education and training will be the catalysts for growth and business stability, which will underpin the model.

### ***B) THE CREATION OF A FOOD PRODUCER NETWORK***

Many of the food producers operating within Kilkenny operate under a number of different groups. These groups include the Savour Kilkenny Food Festival, the "Taste of Kilkenny Food Trail" and various food markets. Each group has a strong set of objectives for that group and membership of the groups overlap in some cases.

To ensure a more strategic approach is taken, it is recommended that a Kilkenny food producer network be formed (and possibly expanded to a regional producer group at a later stage) with the objective of driving the strategic elements of this document through all other organisations within the region. These producer groups should be self-sufficient, but should be supported with the resources needed to operate and achieve their own goals. The issue of resources to support the food producer network will be covered in page 27.

A website, facebook profile and twitter account will be set up for this group. This online capability will facilitate all other online information being produced for producers. This will act as a central reference point for information provided from the Kilkenny Artisan Food School with linkages to supports provided by other national agencies.

As an alternative to creating a new producer group from scratch, it may well be possible to use the network established by a group such as Savour Kilkenny, which could become the foundation group for a wider producer network. Building on an existing network would be the preferred option if possible.

Using transnational budget funding, links should be formed with successful food producer groups like those in the Emilio Romagna region in Italy, with the objective of learning from their successes and implementing best practice as demonstrated.

**C) ONLINE PROVISION OF INFORMATION ON FINANCIAL**

**ASSISTANCE AND SUPPORT TO PRODUCERS.**

There are many sources of financial assistance for new and existing food producers and there are several agencies, providing advice and support. Producers very often find this confusing.

A directory (both online and physical) where all relevant contact details for support agencies and relevant financial assistance will be provided. Information on funding for start up/growth from other sources outside of the state agencies e.g. banks, financial institutions, etc. should also be featured.

While the parameters for these may change, the directory should act as a road map for producers when conducting feasibility studies on either starting up a food business or moving in to a rapid growth phase requiring financial input.

The education strategy should also encompass ongoing training modules for start up companies on this topic. Agencies within the region should also all be briefed on what is available from the other agencies so that each agency within the region will act as a reference point for all others.



#### **D) ONLINE LINKAGES TO OTHER FOOD SCHEMES**

Communication will be vital within the region if cross-overs and conflicting directions are to be prevented.

A robust communication strategy between the various food producers interested within the county should be developed to include:

- An online notice board where all stakeholders would post updates and developments.
- Quarterly update meetings between all relevant food groups within the county, which will act as a communications exercise about direction and major food policies for each of the groups, e.g. A Taste of Kilkenny Food Trail, Savour Kilkenny Food Festival etc.
- The creation of a monthly regional food newsletter which will incorporate the latest initiatives from each food group within the region.

#### **E) THE CREATION OF A DISTRIBUTION STRATEGY**

For producers within the region to gain maximum

efficiency a distribution cluster will be formed comprising all food producers within the county with a view to sharing transport, pooling contacts and lever-aging combined resources. Bord Bia runs six national pooled distribution clusters and the Kilkenny group will be integrated into this network so it can benefit from the combined distribution network elsewhere in the country.

The key focuses of this distribution cluster should be:

- Pooled/shared transport within the region.
- Collaboration on identifying markets not already serviced or where coverage is weak e.g. Dublin.
- Identification of regionally based distributors who will support the group in their efforts to gain coverage in the key markets.
- Exploring opportunities where back hauling and harnessing empty vehicles on return legs of journeys is possible.



**F) THE CREATION OF A GAP ANALYSIS / INNOVATION STRATEGY**

There is always a danger that producers gravitate towards products, which are easy to produce and very often have a strong presence in the market already.

To help eliminate this and foster strong levels of innovation for both new and existing producers, a GAP analysis will be conducted which will help direct producers. Figure 2 sets out a sample GAP analysis, which will be expanded in conjunction with Bord Bia and Enterprise Ireland.



**Figure 2 – Sample GAP Analysis**

**Potential Opportunity GAPS:**

- Charcuterie
- Gluten free products
- Chilled pizza
- Tapas style food
- Artisan savoury pies and quiches
- Pâtés and Terrines
- Value added chicken products
- Artisan lemonade

**Potential Oversubscribed Categories:**

- Jam
- Certain breads like brown soda and batch bread
- Certain cakes like apple tarts and fairy cakes
- Certain cheeses like goats cheese, semi soft washed rind and blue cheese
- Ice-cream
- Chilled and frozen ready meals
- Main stream processed cooked meats
- Fresh apple juice





To encourage innovation international benchmarking will be conducted and an online library of new international food innovations will be created to stimulate local producers.

Stage gate innovation process training will need to be part of the education programme offered by the Kilkenny Artisan Food School to new start up and existing businesses.

**G) THE DEVELOPMENT OF A STRATEGY TO ENCOURAGE START-UP**

It is vital to encourage members of the agricultural community, the general public and students seeking out new careers to consider the food sector, as a new prospective business. The agricultural sector will be a key target area for attracting new food start ups.

There are 4000 farms in Kilkenny (Source Teagasc) and this group present as a potentially suitable base for food start ups for a number of reasons:

- This community is already involved in the food supply chain.
- Many farm incomes no longer fully support the farm family and additional incomes sources are being sought by farmers.

- There is increased downward price pressure on many farm outputs thus forcing farmers to seek out added value food production opportunities.
- Some farms have redundant buildings suitable for conversion to food grade facilities which could make start ups easier.
- In some instances the farm may already be growing the raw material for use in an added value product thus eliminating some production costs.

An ongoing campaign to promote the supports within Kilkenny and wider regions will be used to attract new start ups. This strategy will include:

- Visiting education institutes at a national level where food is a key focus to meet students who are completing their education. The objective is to create awareness about the Food Strategy and supports that are available, to them, as part of that model if they are considering a food business as a career.
- Creating Facebook profiles/Twitter accounts to promote food as a career with a target audience of potential food start ups e.g. agri based groups etc.

- Generating PR and media campaigns of endorsements focused on companies who have already succeeded. Initially this campaign will be stronger in the Kilkenny and local regions and will progress to national level.
- Running open evenings with a targeted audience.
- Creating inter-agency champions and advocates by ensuring all state agencies are fully briefed on the support network available in Kilkenny.
- Providing clear road maps of all of the financial supports which are available to pre start-up and start-up food companies.
- Pitching to existing producers so that they fully understand the strategy and vision, so that they are in a position to encourage new start-up producers who seek their advice.
- The placing of quarterly advertisements in rural publications which outline the supports available and potential success for ‘would be food producers’.
- A professional prospectus covering both the incubation units and retail units should be used to commence this process.

#### ***H) THE BUILDING OF RETAIL UNITS***

Retail units, which will showcase production led artisan retail elements, will be a tangible element of the strategy for consumers. While site selection will determine the ultimate location, a suitable partner developer will also need to be sought to fund the project.

The vision for the retail units is that they would be production led, which would mean that as well as being a retail outlet, each unit would have mandatory production taking place e.g. a baker producing some bread and selling their product at the front of their bakery unit.

Ideally several units located in the same area would make for optimum impact and the possibility of incorporating a farmers’ market one day per week on this site/street would also enhance the proposition. This initiative would need significant marketing investment over a three-year period to help promote the concept.

#### ***I) THE BUILDING OF INCUBATION UNITS***

The provision of food grade workspace for both new and existing food producers will be a key requirement within the region. The ideal situation would be that these units would be located on one campus ranging in size from 500 square feet to a maximum of 2,500 square feet. The Incubation Unit would have a shared boardroom facility and an onsite community kitchen.

If a single campus incubation centre becomes impossible, then a series of clustered units around the region could also be a secondary option.

#### ***J) THE BUILDING OF A COMMUNITY KITCHEN***

A community kitchen is a concept whereby producers can rent a 2,500 square foot state of the art kitchen facility with the most modern cooking and chilling equipment. Its purpose is to both encourage new start up businesses by providing them with an ideal facility and also to be used by existing producers to trial new products not suitable to their own premises.



It will also play a key role within the education strategy. If the incubation centre does not proceed, the community kitchen should be located elsewhere within the region as it will be the site where a considerable amount of the training programmes for the Kilkenny Artisan Food School will take place.

#### ***K) EMBRACING LEAN MANUFACTURING / EFFICIENCY.***

Historically, many Irish producers have started production in a kitchen environment and then graduated over several years to food production units. This has served the food community well as a stepping stone to growth. However it tends to lack focus on lean manufacturing techniques (process changes to help produce the product more efficiently) and maximising efficiencies within the supply chain. Typically producers who embrace lean manufacturing principles can improve efficiency by more than 20%.

These topics should not be seen as the opposite of artisan food production. The food strategy should promote lean and efficient production methods as part of the education strategy from early stage producer development. Access to the Enterprise Ireland Lean Start programmes and other general information on production efficiencies should be provided to new producers at an early stage in their evolution.

Lean manufacturing/efficiency should also be incorporated in to all 'Start Your Own Food Business' programmes.

#### ***L) STATE FOOD AGENCY WORKING GROUP***

Regionally and nationally there are several agencies, which support the food companies with advice, financial assistance, training and development programmes to support the growth of high potential companies.

These agencies include:

- Teagasc
- Bord Bia

- BIM
- Enterprise Ireland
- Fáilte Ireland
- Kilkenny County Enterprise Board
- Kilkenny LEADER Partnership

At national level it will be critical that all these agencies are clear on the strategic direction of the regional economic food model and equally important that local contacts are identified for each agency so that producers have definitive lines of contact.

A working group comprised of a representative of each of these agencies should meet quarterly to ensure that communications are maximised.



## 2 THE DEVELOPMENT OF ROUTES TO MARKET

The development of routes to market will assist producers to grow and develop in a logical progression. Section 5.2 has already identified specific channels through local retailers and food service operators which are designed to encourage producers to seek out as many market opportunities at local level as possible before moving on to opportunities greater distances from their base. This development of routes to market will include the following:

### **A) CREATE DIRECT SELLING ROUTES**

Many producers choose not to sell through conventional routes to market and instead engage directly with the consumer thereby eliminating any 'middle men' and retaining control over the product from creation to consumer. This direct selling will be encouraged as part of the strategic development of the region. As well as selling through farmers' markets, farm shops and box schemes, producers should be encouraged to harness regional festivals and public gatherings as opportunities to engage with direct consumer selling. This will be achieved by engaging with local festival/event organisers to make them aware of the benefits of including food at their events and also by quantifying the market opportunity for producers who are interested in selling at these events.

The ethos of direct selling will be fostered through the education strategy and also through the various organisations and agencies within the region.

Information already exists through the Bord Bia publication. Selling Through Farmers' Markets, Farm Shops and Box Schemes. This information should be made available on an ongoing basis to producers seeking to retail directly to consumers, both as hard copy and online.

Online selling requires specific skill sets and education modules. These should be run periodically by experts in this area as part of the educational strategy. A direct

selling information sheet should be available from local agencies. Route to market planning and direct selling channels will be highlighted in the online information provided to producers and via route to market training from the Kilkenny Artisan Food School.

Dialogue should also take place with established retailers to dispel any fears that direct selling may impact on their established businesses, with real examples used of where direct selling can help grow the sales of conventional retailers as in the example of the Mahon Point Market in Cork.

### **B) EXPORT LED DEVELOPMENT**

While it can take many years for some producers to reach export capability, for others this step can occur earlier in their evolution. A first export opportunity to specialist retailers in London can signal the start of this process. In some cases it can be easier for the producer to get products to London rather than Donegal, therefore information on:

- Export distribution routes.
- Currency expertise and education on cultural taste differences should all be part of an ongoing export programme provided by the Kilkenny Artisan Food School.

This will facilitate producers to make the jump to export. In many cases this could be at an early stage of evolution and it will be important that producers are educated that this step should not be feared, rather embraced.

The skill sets required for export are specific and specialised. As part of the education strategy export modules will be provided through third parties who already specialise in this area e.g. Irish Exporters Association Food programmes, Bord Bia and Enterprise Ireland export supports, etc.

Comprehensive export information will be disseminated online to producers to create awareness of programmes that are available.

### ***C) DEVELOP A FOOD/COUNTRY MARKET/FARMERS'***

#### ***MARKET STRATEGY***

The overriding County Food strategy for farmers and country markets is to encourage new producers to view these channels as a credible first route to market. This will require a lead being taken at local level to spearhead active encouragement of new markets and continued support for existing markets. In essence, local markets must be viewed as a showcase for locally produced food and act as a first channel to market for producer. For this to be achieved a clear local authority business plan for public markets within the region must be created and actioned. The current market infrastructure within Kilkenny is under developed and needs significant support to realise its potential.

The role of private markets must also be set out as they are likely to be a significant contributor to the overall growth of markets within the county. There are other types of markets within the county who do not have food as their main feature, yet have a food presence. These markets should also be included within the strategic development of the food offer.

More information about country markets and farmers' markets in the region must also be made available within the region so that producers are clear what both channels offer as routes to market. The formation of committees to drive the individual markets and participation in the running of the markets will also be vital.

A charter will also be created which will be adopted by all the markets within the county, to encompass best practice and will also guide each of the individual markets in terms of their focus, producer selection and

messaging to the consumer. This will help to clearly define what the markets stand for. This draft will be based on the Department of Agriculture Voluntary Code of Practice for Farmer's Markets 2009 – 2010.

A marketing campaign for Food/Country/Farmers' Markets will also be put in place and communicated through local media, the county food website, etc.

A training programme to improve displays, ownership of market issues by the producers and marketing initiatives will be part of the education strategy and will also be put in place and communicated through local media, the county food website, etc.

This will need to be a continuous evolving process and not a one off training session.

### ***D) IDENTIFY FOODSERVICE/FOOD TOURISM ROUTES TO MARKET***

Route to market planning is an important step for producers. Appendix 3 sets out the regional opportunities/contacts, which exist within the food service/food tourism and retail sectors.

Producers will need assistance to identify the correct route for them at local and national levels. As stated on page 10 this local market is sizeable and far greater than might be envisaged initially. The total food market in Kilkenny is estimated to be €234.54 million annually.



A local directory will be created and maintained and the Kilkenny Artisan Food School will provide route to market training as part of its syllabus.

Involvement of the locally based Kilkenny Tourism group will also be important to harness their knowledge of the local tourism sector.

**E) CREATE A RETAIL AND FOODSERVICE AFFILIATE PROGRAMME**

Retailers and Foodservice operators play a key role in communicating product and producers to customers. As an integral part of the customer communication strategy both retailers and foodservice operators will need to be champions of the food strategy.

Retailers and foodservice operators will be invited to attend a schedule of training workshops that will highlight the overall Kilkenny food strategy and the elements within it. At this event there will also be a ‘meet the maker’ event where producers, retailers and foodservice operators will have the opportunity to meet each other and try to secure further listings. These events will be ongoing and should be run on a twice yearly basis to allow for new producers and operators to meet.

A separate programme within this work stream should be put in place to influence procurement policies of state agencies to support more local foods.

The following are areas where retailers and foodservice operators can support producers:

- To agree, where possible, to stock as many local food products.
- To ensure an uncomplicated listing process for local producers.
- To highlight these local products through innovative signage and prominent display space or mention on menus.
- To be conscious of and facilitate the need for special payment terms for smaller local producers.

- To invite producers in store to run tastings and “meet the maker” sessions.
- To provide assistance to fledgling producers who may not have yet developed the skill sets yet to supply retailers.
- To recommend these producers to other retailers/foodservice operators in their network.
- To consider including local artisan producers in any local advertising campaigns.
- To educate staff about the importance of supporting local producers.
- To support seasonal products, grown in the locality, by facilitating listings for short time periods if required.
- To encourage local producers to pool distribution to the retailer/foodservice operator to help make supply efficient.



### **3 THE DEVELOPMENT OF STRONG CONSUMER COMMUNICATIONS**

Consumers will ultimately decide the fate of the County Food Strategy and extensive work needs to take place in order to ensure that consumers fully understand the dynamics of local food production and the opportunities to purchase foods made by “Local Heroes”

#### ***A) THE CREATION OF A MARKETING STRATEGY***

On-going communication with consumers over several years will be an integral part of creating a pull strategy within the region. This will entail a significant spend in both formal advertising and PR activities to ensure that food is kept top of consumers’ agendas. The creation of a marketing calendar setting out the content and frequency of consumer communications should include:

- Formal ‘paid for’ advertising
- PR Opportunities
- E-Marketing activities
- Creation of a food customer database to be communicated to via text and email.
- Development of innovative direct mail campaigns encouraging consumers to explore regional food activity
- A detailed plan to create awareness among local media stakeholders and how they can support the strategy

Targeting of national media to promote the region food programmes run in conjunction with regional schools and creating linkages between the schools and producers will help to grow interest in local food from an early stage. These programmes should be ongoing, as opposed to one off, to ensure over time a large population of students are educated.

#### ***B) CREATION OF LOCAL FOOD HEROES BRAND***

Historically many counties promoted food from that

county, however recent Bord Bia research has indicated that while this is interesting to consumers, the greater relevance in today’s society is ‘who produced the food and where did it come from?’ The issue of provenance and the personality of the producer must be central to the development of food within the region and the National Food Heroes campaign being launched by The Taste Council should be quickly embraced.

A dynamic producer provenance driven campaign will need to be used as a “call to action” for the public. Local “Food Heroes” must be promoted by retailers and foodservice operators.

#### ***C) DEVELOPMENT OF FOOD PRODUCERS ONLINE MARKETING PLAN***

As the County Food Strategy develops there will be rapid growth in the amount of food activities taking place. Online media should be embraced as tools to effectively promote the message including:

- The creation of a Kilkenny Food Producers website
- Facebook profile including the linkage of food producer-retailer-foodservice operator profiles
- The harnessing of Twitter
- The creation of an online resource which can be used as a communication tool between all the stakeholders within Kilkenny to update progress on food related issues

The objective is to create a communication flow between consumer and producer, which will facilitate the growth of a relationship and brand awareness. The region must be famous for one-to-one marketing of food and not just its commercial activities.

#### ***D) DEVELOPMENT OF TOURISM LINKS***

Food tourism is already an economic force within the region. However this needs to be strengthened significantly. Greater awareness is needed among producers of the opportunities within the sector.

The education of chefs and proprietors on how to harness local 'food heroes' as a mechanism to attract visitors should also be embraced.

Developing food tourism specific holiday packages, local and regional food producer tours and featuring local food products on menus needs to be embraced to help position the region as a leading food tourism destination. The ongoing interaction between tourism stakeholders and regional food producers is essential.

Food tourism is an important element of the overall food strategy and will be guided by the Fáilte Ireland strategy "Food Tourism Implementation Framework" to be published November 2010.

#### ***E) LINKING OF COOKERY SCHOOLS TO CONSUMERS***

There are a number of cookery schools already established within the region. It is important that the owners/managers of these facilities are driven by the Kilkenny Food Strategy so that they can reflect the local food ethos in the approach their school takes to educating consumers. Local food culture should be reflected in the programmes they run, and their classes used as a platform to educate consumers on the dynamics of regional food production.

The encouragement of cookery schools to focus on heritage recipes, traditional skills with a place in today's society, and a clear focus on locally produced produce is paramount. The cookery schools also present as an ideal communication channel to the general public. Therefore cookery school owners should be fully aware of the overall food strategy and in particular supports, which are available for a start up food producers, as many aspiring producers may display their first interest in food by attending cookery classes.

#### ***F) DEVELOPMENT OF A SOCIAL INCLUSION STRATEGY***

Several agencies within the region are mandated to work on social inclusion. These agencies will need to

understand the Kilkenny Food Strategy so that they can incorporate food as a key part of the programmes they operate. This will ensure that food education reaches all parts of the local community.

Community crèches as an example should use food from the region when creating their food menus and managers of these types of social inclusion schemes should be educated on the rationale of using local produce, both from a seasonality/freshness point of view and an economic model perspective. Work placement schemes should include food producers as hosts companies and training programmes targeted at those returning to work should offer food related courses in their mix.

#### ***G) CREATION OF PR LINKAGES TO LOCAL MEDIA***

As part of the ongoing communication exercise to consumers it is vital that the local media are fully briefed on the Kilkenny Food Strategy and they understand the ethos of the strategy to allow them to comment in an informed way on it. Annual PR calendars targeting local and national media is an important and every opportunity should be sought to highlight regionally based food initiatives.

#### ***H) COMMUNICATION THROUGH EXISTING FESTIVALS***

There are a plethora of festivals, which take place in the region on an annual basis. Some of these are major international events like the Kilkenny Cat Laughs and the annual Kilkenny Arts festival. Obviously these festivals operate to a specific theme very successfully, but as part of the strategic development of food for the region these festival organising committees will be encouraged to feature food showcase events and other food activities as part of their programmes. They attract thousands of people to the region and the inclusion of food events within their programmes will help further contribute to the local economy food producers to become a powerful national and international 'visitor pull' festival.

There is an opportunity for Savour Kilkenny to link through the Kilkenny Cat Laughs and Arts Festival programmes to ensure cohesive food messages are communicated to consumers and tourists and a partnership arrangement between Savour Kilkenny and other festivals as regard to their food element is recommended.

#### **4 THE REGIONALISATION OF THE ECONOMIC FOOD MODEL**

As acknowledged in the outset of this document, a regional approach to food development is an objective of the Strategy.

While the Kilkenny region will facilitate the initial development of the model, it is envisaged that within the first 13 weeks of the strategic implementation, alliances will be formed with neighbouring counties to explore which elements of the strategy would lend themselves to be regionalised first. These may include the regionalisation of:

- Consumer education and the creation of links between consumers and local producers
- Food Market Strategy
- Producer Education Strategy
- Local Food Heroes Strategy

This regionalisation of the strategy will require strong support from the national food agencies who will need to act as catalysts and facilitators for the success of the regional roll-out.

#### **7.2 Projected Revenue Growth**

By 2014 the current 40 producers are targeting to grow employee numbers by 20% and sales by 40%, adding €6 million extra revenue to the local economy.

Ten new producers are also projected to have commenced business by 2014 with a combined year one turnover of €1 million. This will bring the 2014, turnover for all producers to €22 million.

#### **7.3 Resources**

While there are several food groups within Kilkenny County who will facilitate the start of the process, implementation of the Food Strategy will not succeed without the allocation of resources, both human and financial.

The lead agency, probably KLP, should be responsible for:

1. Managing the implementation of the implications in this document.
2. The overall development of the strategy.
3. The coordination of other agencies' responses to the various initiatives.

#### **7.4 Food Development Team**

It is recommended to appoint a Food Development Team (FDT) who will act as a catalyst for implementation and cohesiveness among all the stakeholders in this project. Their role will be an ongoing one and their focus will be the ongoing development of food, once the initial implementation of this food strategy is completed.

The Food Development Team will require an administrative back up, if their role is to be effective.

They will be responsible for the running of the Kilkenny Artisan Food School, continued development of each of the strategic objectives above and, most importantly, facilitation of ongoing links between producers and all the other agency stakeholders.



## 7.5 Objectives, Actions, Outcomes, Resources and Timescales

Strategic Objectives:	Actions:	Outputs:	Resources:		Timescale:	
			€	Who	Start	Finish
<b>1. The Development of Supports for Food Producers</b>						
	A) The Development of an Education Strategy	Training needs assessment complete Creation of Kilkenny Artisan Food School 2010 Training schedule in place	€70,000 (incl. Training needs assessment, Year one training)	FDT, KLP, KCEB, BB, EI, Teagasc, Producers	November 2010	January 2011
	B) The Creation of a Food Producer Network	Committee in place 5 meetings per year	€3,500 (Website, etc.)	FDT, KLP, Producers, Savour Kilkenny	November 2010	November 2010
	C) Online Provision of Information on Financial Assistance and Support to Producers	Full directory of services and all agency supports Linkages to other appropriate agency websites	€500 (Printing Costs) (Food producer website will be used)	FDT, KLP, KCEB, BB, EI, Teagasc	November 2010	December 2010
	D) Online linkages to other food schemes	Online notice board Quarterly stakeholder meetings in place Monthly newsletter	€1,500 (Online elements hosted on Kilkenny Food Producers site – cost for printed monthly newsletter)	FDT, KLP	November 2010	January 2011
	E) The creation of a Distribution Strategy	Establish route to Dublin Commence minimum of two producers pooling transport Establish one new market for the group	No funding required	FDT, KLP	November 2010	January 2011
	F) Creation of Gap Analysis/Innovation Strategy	Creation of online library List of oversubscribed categories Workshop content set out	No Funding Requirement	FDT, KLP, BB, EI	November 2010	December 2010
	G) The Development of a strategy to encourage start-ups	Food start up document complete KK briefing to all education institutes Facebook/Twitter in place Adverts in newspapers	€10,000 p.a. (formal advertising, brochures, leaflets, etc. to encourage start up producers)	FDT, KCEB, BB, EI	January 2011	February 2011
	H) The Development of Retail Units	Retail Units in operation Marketing campaign in place Weekly farmers' market in place	Funding to be determined once scope of development is clarified	FDT, KLP		March 2010

Strategic Objectives:	Actions:	Outputs:	Resources:		Timescale:	
			€	Who	Start	Finish
	I) The building of Incubation Units	Incubation units in place	Funding to be determined once scope of development is clarified	FDT, KIDCO, EI, KLP	January 2011	December 2011
	J) The building of a Community Kitchen	Community kitchen in place and open for rental Marketing info circulated in the region Formal advertising	Build cost to be determined once scope of development is clarified. €3,000 (to cover marketing costs on an annual basis)	FDT, KIDCO, EI, KLP	January 2011	December 2011
	K) Embracing Lean Manufacturing/ Efficiency principles	Existing producers to have attended a workshop on 'What is lean?' Relevant producers engaged with lean start consultants	€1,500 (for workshops)	FDT, KLP, EI, KCEB	January 2011	February 2011
	L) The Creation of State Food Agency Links	Kilkenny strategy document circulated to all agencies Formation of working group to meet quarterly	No Funding Required	FDT, KLP		November 2010
2. The Development of Clear Routes to Market						
	A) Develop Direct Selling Routes	Route to market workshop content created Engagement with all regional festival organisers Direct selling information sheet prepared and made available to all agencies Direct selling info available in online resource.	No Funding Required	FDT, KLP, KCEB	November 2010	December 2010
	B) Create Export Channels	Export distribution directory prepared Relevant producer made aware of export programmes available Online export module created All general market owners met and briefed on export strategy	No Funding Required (These programmes are supported by other agencies)	FDT, KLP, KCEB, Irish Exporters Association	January 2011	March 2011
	C) Develop Country/ Farmers' Market Strategy	Local authority market plan created Private market plan created	€6,000 (training for stall holders and marketing cost year 1. All stallholders trained.)	FDT, KLP, KCC	January 2011	March 2011

Strategic Objectives:	Actions:	Outputs:	Resources:		Timescale:	
			€	Who	Start	Finish
	D) Identify Foodservice/Food Tourism Routes to Market	Development of route to market training All producers attend route to market workshop Local directories circulated to all producers and made available online and to other agencies	€2,000 (cost of workshops)	FDT, KLP, KCEB	November 2010	January 2010
	E) Create Retail & Foodservice Affiliate Programme F) Identify Retailer Routes to Market	Communicate producer list to retailers and foodservice operators Charter completed and sign up Meet the Maker launch event	€2,000 (Meet the Maker event)	FDT, KLP, Retailers, Food service Operators, Producers	November 2010	February 2011
3. The Development of Strong Consumer Communications						
	A) The creation of a Marketing Strategy	Creation of annual PR calendar Local media briefing Annual schedule of advertising Implementation of schools food connect programme	€40,000 p.a. (Formal local advertising, local and national PR, School programme)	FDT, KLP	November 2010	January 2011
	B) Creation of Local Food Hero Brand	'Point Of Sale' suite designed and printed Retailers and producers linked together Local advertising launch event	€3,500 (Local advertising and design costs)	FDT, KLP, Producers, Retailers, Foodservice Operators	November 2010	February 2011
	C) Development of Food Producers Online Marketing Plan	Facebook, website and twitter in place	No Funding Requirement	FDT, KLP, Producers	November 2010	December 2010
	D) Development of Tourism Links	Briefing document to be circulated among all operators Increased producer naming on menus Creation of food tourism package	No Funding Requirement	FDT, KLP, FI, Hotels, Producers	January 2011	March 2011
	E) Linking of Cookery Schools to consumers	Briefing document issued to all cookery schools Meeting with owners At least 3 annual local food programmes	No Funding Requirement	FDT, KLP	November 2010	January 2011

Strategic Objectives:	Actions:	Outputs:	Resources:		Timescale:	
			€	Who	Start	Finish
	F) Development of a Social Inclusion Strategy	Briefing session for all local agencies Circulate information sheet Meet with local managers Minimum of three programmes including local food	No Funding Requirement	FDT, KLP, FAS	November 2010	February 2011
	G) Creation of PR Linkages to Local Media	Annual PR calendar Meeting media owners for briefing Target 25 local print media hits per year and ten radio hits	No Funding Requirement	FDT, KLP	November 2010	December 2011
	H) Communication through Existing Festivals	Meet all festival organisers Develop lead festival through Savour Kilkenny Food feature in Cat Laughs and Arts Festival 2011	No Funding Requirement	FDT, KLP, Festival Organisers, Savour Kilkenny	November 2010	December 2010
4. The Regionalisation of the Economic Food Model						
	Kilkenny, Carlow, Wexford, Tipperary, Waterford	Dialogue meetings with each group Roll out of four identified elements regionally Regional strategy group established with ongoing meetings	No Funding Requirement	FDT, KLP, Interested counties	February 2011	March 2011
Food Development Team (FDT)	The employment of a food development officer and admin back up	Implementation of all the strategic recommendations above	€75,000 p.a. (office rent, overheads, salaries)	n/a	November 2010	December 2011



## 8. Appendices

**8.1 Appendix 1 — Kilkenny Producer Overview** This list is indicative of the market, but does not represent all Producers

Micro (≤ €2m turnover, < 10 Employees)	Medium (≤ €10m turnover, < 50 Employees)	Large (≤ €50m turnover, < 250 employees)
Dunedin Apple, Bennetsbridge – Apple Grower		Glanbia – Dairy Products
The Little Apple Company, Piltown– Apples & Juice		Smithwicks (Diageo) St Francis Abbey Brewery – beer/ale
Homebake Cakes, Thomastown – Baked products for supermarkets		
Oldtown Hill Bakehouse, Tullaroan - Baker		
Teach Mhuire, Gowran - Baker & Café		
Keogh’s Model Bakery, Callan - Bakery		
Blueberry Ladder, Kilkenny City – Caterer / Products		
Knockdrinna Farmhouse Cheese, Stoneyford – Cheese, pork and poultry		
John Hoyne, The Fishermans market, Thomastown - Fish		
Kilkenny Free Range Poultry, Mary and Tony Walsh, Callan Rd., Kilkenny		
The Truffle Fairy, Thomastown - Chocolate		
A Slice of Heaven, Piltown – Bespoke Deserts		
Ballylarkin Glen More Liquer Ltd Kilkenny		
Bergin’s Vegetables, Jenkinstown.		
Camphill Jerpoint – The Mustard Seed – Thomastown		
Bia Suir Meats, Ferrybank - specialty meats and poultry		
Goatsbridge Trout Farm, Thomastown - Fresh & Smoked Trout		
Eileen’s Home Bake, Callan - Baking		
Mileeven Fine Foods, Piltown – Honey, Organic Preserves, Speciality Honey and Christmas Products		
Brennan’s , Gathabaun Ice-Cream		
Cramers Grove, Kilkenny Ice-Cream		
Coco Zen, Thomastown - Occasion Cakes		
Highbank Farm , Cuffesgrange - Organic Apples & Apple Products		
Drumeen Happy Heart Oil, Urlingford - Rape Seed		
Lavistown Foods, Clara - sausages		
Granny Maddocks Pantry, Ferrybank - Specialist Dietary Products		
Tess’s Home Baking, Kilkenny City		

Kells Wholemeal, Bennetsbridge - Wholemeal & Pre-mixed Products		
Coole Pump Dairies, Callan – Yoghurt & Dairy Products		
Bia Beo Organics, Knocktoper		
Purcell’s Fruit & Vegetables, Dunmore		
Nellie’s Farm Shop, Kilkenny City		
Emma’s Boutique Bakery, Slieverue		
Bolton Meats, Callan		
Callan Meats, Callan		
<b>Estimated No. Of Employees: 90</b>	<b>Estimated No. Of Employees: n/a</b>	<b>Estimated No. Of Employees: n/a</b>
<b>Estimated Turnover: €15 million</b>	<b>Estimated Turnover: n/a</b>	<b>Estimated Turnover: n/a</b>
<b>Targeted Employees 2014: 118</b>	<b>Targeted Employees 2014:</b>	<b>Targeted Employees 2014:</b>
<b>Targeted Turnover 2014: €22 million</b>	<b>Targeted Turnover 2014:</b>	<b>Targeted Turnover 2014:</b>

## 8.2 Appendix 2 — Kilkenny Retail Market Map

This list is indicative of the market, but does not represent all retailers.

Independent Retailers	Speciality Shops	Symbol Groups	Multiple Retailers	Giftng/Hampers	Markets
<ul style="list-style-type: none"> <li>• O’Neill Supermarket, Kilmacow.</li> <li>• Bergins, Urlingford.</li> <li>• Cullens, Gowran.</li> <li>• Byrnes, Freshford.</li> <li>• Eastern Food &amp; Spices, Kilkenny City.</li> <li>• Supervalu – Ballyragget.</li> <li>• Supervalu - Kavanagh’s, Thomastown.</li> <li>• Mini Supermarket, Tullaroan.</li> <li>• Lennon’s, Goresbridge.</li> <li>• John Allen, Irishtown.</li> <li>• Kerwicks, Callan.</li> <li>• Jimmy Brennan, The Sycamores, Kilkenny.</li> <li>• Ballyhale .</li> <li>• Piltown.</li> </ul>	<ul style="list-style-type: none"> <li>• Gourmet Store, Kilkenny City.</li> <li>• Blueberry Larder, Kilkenny City.</li> <li>• Keogh’s Bakery Shop, Kilkenny City.</li> <li>• Keogh’s Bakery, Callan.</li> <li>• Slip Sweet Shop, Kilkenny City.</li> <li>• Freshco, Carlow Rd., Kilkenny City.</li> <li>• Knockinna Farm Shop, Stoneyford.</li> <li>• Glassraí and Goodies, Gowran.</li> <li>• Growing Greener, Thomastown.</li> <li>• Nellies Farm Shop, Kilkenny City.</li> <li>• Fruit &amp; Veg Shop, Ballyragget.</li> <li>• Fruit &amp; Veg Shop, Urlingford.</li> <li>• Butcher &amp; Deli, Urlingford.</li> <li>• Shortis Wong Deli, Kilkenny City.</li> </ul>	<ul style="list-style-type: none"> <li>• Spar, Callan.</li> <li>• Spar, Kilmacow.</li> <li>• Eurospar, Castlecomer.</li> <li>• Spar, Goresbridge.</li> <li>• Eurospar, Newpark Shopping Centre, Kilkenny City.</li> <li>• Spar, Irishtown.</li> <li>• Centra, Mullinavat.</li> <li>• Centra, Mooncoin.</li> <li>• Centra, Thomastown.</li> <li>• Centra, Piltown.</li> <li>• Centra, Ardmore, Kilkenny City.</li> <li>• Centra, Bennettsbridge.</li> <li>• Centra, Knocktoper</li> <li>• Centra, Urlingford.</li> <li>• Centra, College Road, Kilkenny City.</li> <li>• Centra, John’s Green, Kilkenny City.</li> <li>• Londis, Callan.</li> <li>• Cost Cutter, Ballyragget.</li> <li>• Londis, Stoneyford.</li> <li>• Londis, Castlecomer.</li> <li>• Mace, Dublin Road, Kilkenny City.</li> <li>• Costcutter Express, Piltown.</li> <li>• Gala, Castlecomer.</li> <li>• Gala Express, Ballyragget.</li> </ul>	<ul style="list-style-type: none"> <li>• Superquinn, Market Cross, Kilkenny.</li> <li>• SuperValu, Loughboy, Kilkenny.</li> <li>• SuperValu, Thomastown.</li> <li>• SuperValu, Callan.</li> <li>• SuperValu, Graiguenamagh.</li> <li>• Aldi, Ferrybank.</li> <li>• Lidl, Waterford Rd. Kilkenny City.</li> <li>• Lidl, Thomastown.</li> <li>• Dunnes, McDonagh Junction.</li> <li>• Dunnes, Kieran St., Kilkenny City.</li> </ul>	<ul style="list-style-type: none"> <li>• Blueberry Larder, Market Yard.</li> </ul>	<ul style="list-style-type: none"> <li>• Kilkenny Farmers Market, Mayor’s Walk, Kilkenny City.</li> <li>• Country Market Ltd. Kilkenny City.</li> <li>• Freshford Country Market.</li> <li>• Castlecomer Country Market.</li> <li>• Thomastown Country Market</li> </ul>

### 8.3 Appendix 3 — Kilkenny Foodservice/Food Tourism Market Map

This list is indicative of the market, but does not represent all operators.

Commercial Sector	Commercial Sector	Commercial Sector
Full Service Restaurants	Pubs / Coffee Shops	Quick Service Restaurants
Asian Garden, Graiguenamanagh	Amber Blacks, Kilkenny City	Abrakebabra, Rose Inn St, Kilkenny City
Barry Morrissey's Bar & Restaurant	Blackberry Café, Thomastown	Bagel Factory, McDonagh Junction, Kilkenny City
Billy Byrne's Bar & Restaurant, Kilkenny City	Blueberry Larder, Kilkenny City	
Bollard's Bar & Bistro, Kilkenny City	Bridge Inn,	Eddie Rockets, McDonagh Junction
Breathnach's Steakhouse, Kilkenny City	Butler's Inn Bar & Restaurant	Godfathers Pizza, Kilkenny City
Campagne, Kilkenny City	Café at the Watergarden Garden, Thomastown	McDonalds, Upper Patrick Street, Kilkenny City
Chez Pierre, Kilkenny City	Centre	Pizza Hut, John's Bridge
Claddagh Restaurant, Springhill, Kilkenny City	Café del Vino	Supermacs, Callan Road, Kilkenny City
Crystals, Callan	Café l'Arche, Callan	Supermacs, High St, Kilkenny City
DT's Bar, Kilkenny City	Café One, Kilkenny City & Castlecomer	Uncle Sams, High St, Kilkenny City
Eliza Blue Steakhouse, Kilkenny City	Café Sol, Kilkenny City	
Emerald Gardens Oriental, Kilkenny City	Circle of Friends, Inistioge	<b>Hotels</b>
	Cleeres, Kilkenny City	Ballyogan House
Foodworks, Kilkenny City	Coffee Dock	Brog Maker Hotel, Kilkenny City
Footlights by the River, Inistioge	Coffee on High, Graignamanagh	Carroll's Hotel, Knocktopher
Forge Restaurant, Urlingford	Costa Coffee, Kilkenny City	Club House Hotel, Kilkenny City
Georgian Dining Room (Club House Hotel)	Crotty's Coffee Shop, Kilkenny City	Days Hotel, Kilkenny City
Golden Inn Palace, Kilkenny City	Esquire's, Kilkenny City	Hibernian Hotel, Kilkenny City
Green Chilli, Kilkenny City	Gooseberry Lane	Hotel Kilkenny, Kilkenny City
Gullivers, Newpark, Kilkenny City	Gourmet Store, Kilkenny City	Kilford Arms, Kilkenny City
	Jarrow's Café, Castlecomer	Kilkenny Inn, Kilkenny City
Italian Connection, Kilkenny City	Kafe Katz, Kilkenny City	Langton Hotel, Kilkenny City
Jacob's Cottage (Hibernian Hotel), Kilkenny City	Kilkenny Café, Kilkenny City	Lyrath Estate, Kilkenny City
Kam Palace, Urlingford	Kilkenny Castle Café, Kilkenny City	Mount Juliet Golf & Spa Hotel, Thomastown
Kendals Restaurant, Mount Juliet, Thomastown		Newpark Hotel, Kilkenny City
Key Largo, Kilkenny City	Knockdrinna Café, Stoneyford	Ormonde Hotel, Kilkenny City
Kilkenny Design Restaurant, Kilkenny City	Lanigan's Bar & Restaurant, Kilkenny City	Pembroke Hotel, Kilkenny City
Kytelers, Kilkenny City	Left Bank, Kilkenny City	River Court Hotel, Kilkenny City
Langtons, Kilkenny City	Marble City Bar & Tea Rooms, Kilkenny City	Springhill Court Hotel, Kilkenny City
La Rivista, Kilkenny City		
Lautrecs, Kilkenny City	Matt the Millers Pub, Kilkenny City	Waterside Guesthouse, Graignamanagh



Commercial Sector	Commercial Sector	Commercial Sector
Full Service Restaurants	Pubs / Coffee Shops	Quick Service Restaurants
Li Garden	Mellow Café, Callan	Zuni Hotel, Kilkenny City
Little Italy, Kilkenny City	Michael Dempsey's Bar & Restaurant, Kilkenny City	
Long Man of Kilfane, Thomastown	Michael Dore Deli & Café, Kilkenny City	
	Mocha Bagel, Kilkenny City	Creative Catering
Ming Court, Kilkenny City	Mug Shot Café, Kilkenny City	Get the Caterers In
Ming's Dynasty	Nicholas Mosse Pottery Café, Bennettsbridge	Mise en Place
O'Reilly Bar & Steakhouse, Kilkenny City		Noreside Carering
Park Village, Thomastown	O'Riadas, Kilkenny City	
	Pantry, Kieran St, Kilkenny City	Institutional Sector
Reflections	Paris Texas, Kilkenny City	
Rinuccini, Kilkenny City	Pennyfeather, Kilkenny City	Diageo / Smithwicks St. Francis Abbey Brewery (internal catering - Morgan Farrell)
Ripley's Steakhouse, Kilkenny City	Pump House, Kilkenny City	
Riverside Restaurant (River Court Hotel), Kilkenny City	Quigley's Deli, Kilkenny City	
Royal Spice, Kilkenny City	Reuben's Café Bar ,	St Luke's General Hospital Kilkenny (internal catering - HSE procurement)
		Stephens Army Barracks, Kilkenny (milk, bread and veg procured locally at cash & carry)
Savour (Ormonde Hotel), Kilkenny City	Scruffy Duffy's, Callan	
Shimla, Kilkenny City	Sol Bistro, Thomastown	
Swans, Kilkenny City	Teach Mhuire, Gowran	
Taste Italy, Kilkenny City	The Big Wheel Bar & Restaurant, Callan	
The Grapevine, Kilkenny City	The Duiske Inn, Gaignamanagh	
The Grill Room (Kilkenny Inn Hotel)	The Field, Kilkenny City	
The Lady Helen Restaurant, Mount Juliet, Thomastown	The Fox & Goose Bar & Restaurant, Clara	
The Lime Tree, Castlecomer	The Old Charter House, Callan	
The Mill House, Kilmacow	The Parlour Café, Pembroke Hotel, Kilkenny City	
The Motte, Inistioge	The Pike, Clara The Thatch Pub, Grannagh Castle	
The Rising Sun, Mullinavat	The Two Dames, Kilkenny City	
Waterside Restaurant (Waterside Guesthouse), Gaignamanagh	The Yard, Market Yard, Kilkenny City	
White Oak, Kilkenny City	Urlingford Arms, Urlingford	
Zuni, Kilkenny City		







# The County Kilkenny Food Strategy



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