



**Cork  
CHAMBER**  
IN BUSINESS FOR BUSINESS

# Cork's Agri-Food & Drinks Opportunities



# Foreword

As opportunities within the agri-food and drinks sector have increasingly moved under the policy spotlight and food and drinks are increasingly seen as the growth area for the future, Cork with its long and rich heritage, abundant natural resources, intellectual capital and technical capabilities has a major competitive advantage and distinctive opportunity to position itself as a region of leading capability in the global market. However and critically, in order to fully exploit and capitalize on these opportunities, it is critical that the optimal infrastructure, services, resources, supports and capabilities are in situ so that Cork's competitive advantage is harnessed and the now existing very rich and unique opportunities are not missed.

As the leading business organisation in the Cork region, Cork Chamber of Commerce has a mandate to develop and promote policy recommendations that create an enabling business environment and optimise the region's economic development. It is this mandate that led the Chamber to undertake exploratory consultations with key stakeholders from across the regional and national agri-economy to ascertain whether additional enablers and supports are required to ensure Cork is as well positioned as possible to capitalise on its agri-opportunity. Particular emphasis was paid to those agri-sectors where the region has naturally rich resources and extensive capabilities including dairy, beef, fish, shellfish, artisan foods and brewing and distilling. It is essential to ensure that recommendations regarding infrastructural supports from R&D and skills development to processing and product development and marketing and international trade expansion target and catalyse growth across these key agri-areas.

This strategy has been developed based on the main findings of Cork Chamber's research into the key opportunities across the food and drinks sector within the Cork region. It identifies the abundant resources and natural strengths that are already in place and also identifies a number of key recommendations, to ensure that Cork is prime positioned to take advantage of the rapidly growing agri-opportunities. As competing regions and countries scale-up their strategic policy developments and investments to gain a more secure foothold in the agri-arena, the time is ripe to fast-track the pursuit of a number of specific policies to ensure

Cork augments and solidifies its prime positioning as an agri-leader of capability and scale.

Special acknowledgement and appreciation is due to those organisations who despite their busy schedules gave generously of their time to support the Chamber's research and analysis. Their expertise, contributions and candid views were invaluable in highlighting the strengths of Cork's agri-sector, and the myriad opportunities for growth and enhanced revenue generation should additional supports and infrastructures be put in place. While the views reflected in this report are those of the Chamber alone, the opportunity to access the perspectives of those within the agri-space supported us in better understanding the challenges and opportunities from the perspective of those who engage within the sector on a daily basis.

We would particularly like to thank the members of Cork Chamber's Agrifood & Drinks Working Group; Dan Mc Sweeney, Rose McHugh, Frank O'Mahony, Siobhán Bradley and Alma Murnane for their time, effort and valuable inputs which were key in guiding the development of this report.

While recognising that the report's recommendations require a united approach from a diverse group of stakeholders to ensure the region is sufficiently robust and diverse enough to perform alongside its Irish, European and world-wide competitors, Cork's natural resources and track record of accomplishments and successes to date are testament to the region's ability to collaboratively build the structures and processes that secure major economic and employment gains for Cork and the wider domestic economy.



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## Acronyms

<b>APC</b>	Alimentary Pharmabiotic Centre
<b>CIT</b>	Cork Institute of Technology
<b>CPD</b>	Continuing Professional Development
<b>FHI</b>	Food for Health Ireland
<b>FITU</b>	Food Industry Training Unit
<b>HEI</b>	Higher Education Institutions
<b>ICT</b>	Information & Communication Technologies
<b>R&amp;D</b>	Research & Development
<b>MNC</b>	Multinational Corporations
<b>SME</b>	Small Medium Enterprises
<b>UCC</b>	University College Cork

# Cork's Agri-Food & Drinks Opportunity

## Global Megatrends: population growth & shifting consumer preferences

- Projected 30% increase in food demand by 2020
- Increased demand for functional food products & nutraceuticals in mature EU/US markets
- Growing demand for western style diets in emerging economies
- Increased demand for sustainable green products



## Projected Irish Growth Trends: *Harvest 2020* Targets

- €1.5 billion increase in the value of agriculture (agrifood & drinks), fisheries and forestry output
- €3 billion value added in agriculture, fisheries and wood products
- Export target of €12 billion (42% increase on 07-09 averages)
- 50% increase in milk production
- 30,000 new jobs across the agri-economy



## Cork's Agri-strengths

- Highest amount of used agricultural land & largest farm size in Ireland
- A leading dairy producer with world class dairy processing plants
- Leading infant formula producer
- Major beef producer
- Second longest county coastline and renowned for its quality white fish & shellfish & growing aquaculture output
- Significant drinks industry with leading global brewery and distillery presence & burgeoning craft beer market
- Excellent R&D capabilities & leading agri-research institutions
- Quality higher education infrastructure with extensive range of agri-related programmes from Level 5 to 10
- World class pharmaceutical cluster with nutraceutical capacity
- Accomplished artisan food sector, extensive tourism food trails and major food attractions



**Compelling opportunities for Cork as a vital  
& leading player in Ireland's Agri-Economy**



## Cork's Agri-Strengths:

**Major drinks presence from global drinks leaders to vibrant craft brewing industry**

Teagasc / UCC Alliance 2<sup>nd</sup> Longest Coastline, renowned quality seafood

A leading dairy producer & processing county Port of Cork

**World-class R&D capabilities & leading agri research institutes**

World class Pharmaceutical Cluster with Nutraceutical capacity

**Cork Airport Quality Higher Education infrastructure**

Leading infant formula producer Major beef producer

Accomplished artisan food sector World class dairy processing facilities

Highest amount of used farm land & largest farm size

## Cork is home to:

**Ireland's only Seafood Development Centre**

Irish Yogurts Tourist Food Trails

**Gourmet Capital Kinsale CIT Danone**

Midleton Distillery & Visitors Centre

**Teagasc Moorepark Teagasc Clonakilty**

Agricultural College Food Industry Training Unit

Barry's Tea UCC Jameson Glenilen Farm Pepsico World Wide Flavours HQ

Ballymaloe Heineken Musgrave Group Dairygold

**Alimentary Pharmabiotic Centre**

English Market Barry Group Carbery

# Capitalising on Cork's Opportunity: An Agri-Action Strategy

## **Embed Cork's Positioning as a Competitive Knowledge Economy & Leading Global Innovator in Agri R&D**

- Facilitate cross-industry growth opportunities in nutraceuticals
- Develop a food/beverage technology cluster to capitalise on regional strengths
- Establish agri-commercial mentoring hub for research commercialisation

## **Ensure Cork's Positioning as a Leading Provider of cutting-edge Talent**

- Establish expert cluster of influencers to inform skills development infrastructure
- Deliver tailored work placements & bespoke programmes in key growth areas
- Implement collaborative PR campaigns between industry & HEIs
- Enable knowledge transfers via placement opportunities for international students

## **Position Cork as the Optimum Environment for Growing Agri-Businesses**

- Develop a continuum of supports for agri-entrepreneurs & young start-ups
- Establish formal linkages between larger and micro-enterprises to foster growth
- Develop a UCC/CIT/Teagasc partnered mentoring programme akin to the Rubicon/Ignite Centres CIT & UCC
- Establish regional financial fund to address the equity gap and enable scale ups
- Partnered networking event with established agri- agencies to support SMEs
- Establish a designated Food Centre to support early stage start-ups & grow the region's food profile

## **Implement a Co-ordinated Regional Marketing Strategy that Makes Cork Synonymous with Agri-food**

- Establish cluster of leading representatives from across the agri-sectors to develop a 'joined-up' branding strategy that promotes awareness of Cork's agri strengths and capabilities
- Integrate Cork's agri-offerings into regional tourism experience packages

## **Ensuring Quality Foundations & Prime Conditions for Long Term Agri-Growth through an Agreed Regional Strategy**

- Develop a green and clean Cork energy brand to address energy costs
- Implement a 'regional co-operative structure'/'buyer/retailer' purchasing power group to support local producers
- Joined-up transport strategies & collaborative advocacy campaigns

# The Agri-Sector:

The Time is Ripe,  
The Opportunity is Now

The agri-sector<sup>1</sup> is Ireland's **largest and most successful indigenous industry**. Ireland's multi-billion food and drinks industry **sells products in over 170 markets** around the world, accounts for 7.7% of Ireland's economy wide Gross Value Added at factor cost and **produces over a third of our net export earnings** from primary and manufacturing sectors<sup>2</sup>. It is **one of Ireland's largest employers** with an estimated 150,000 workforce, significantly weighted in rural and coastal communities<sup>3</sup>. Equally imperative and reinforcing of the sector's value is its **above average retention and reinvestment of funds within the domestic economy** with agriculture sourcing 74% of raw materials and services from Irish suppliers by contrast to 40% for other manufacturing sectors<sup>4</sup>.

Government's *Harvest 2020*, founded on an 'act smart', 'think green' and 'achieve growth' strategy crystallises the sector's integral role to Ireland's future wealth and employment generation. By *Harvest 2020*, Government aims **to increase the value of primary output across agrifood, fisheries and forestry by 33%** (€1.5 billion), **increase the valued added by over 40%**, **increase the value of exports by 42% to €12 billion**<sup>5</sup> and **deliver in the region of 30,000 new jobs across the entire economy**.

Global megatrends across the agri-economy are further testament to the unique and compelling opportunities that now exist for Ireland's agri-sector. **Global population growth** and associated **increases in global food demand** (anticipated 30% increased demand by 2020), evolving consumer **preferences for 'western style' diets in emerging economies**, the ever-increasing demand for **sustainable green products** and the **growing demand** in the mature EU and US markets **for functional food products** are all indicative of the growing scale of demand for Irish agri-food exports.



As a region with a rich heritage and natural resources of critical mass across the agrifood and drinks spectrum from coast and farm to fork, excellent R&D capability in food science and technology and a long and successful track record in securing international research and industry investment, **Cork has a vital role to play and will be integral to Government's success in attaining its 'Harvest 2020' targets.**

<sup>1</sup> The term 'agri-strengths', 'agri-economy' etc throughout this report, unless otherwise stated incorporates the food, drinks and fisheries sector.

<sup>2</sup> Department of Agriculture, Food & Marine (2013), *Annual Review & Outlook for Agriculture, Food & Marine 2012/2013*

<sup>3</sup> [www.teagasc.ie/agrifood](http://www.teagasc.ie/agrifood)

<sup>4</sup> Department of Agriculture, Food & Marine (2013), *Annual Review & Outlook for Agriculture, Food & Marine 2012/2013*

<sup>5</sup> Based on 2007-2009 averages

# Cork's Agri-Opportunity:

## A Leading & Vital Player in Ireland's Agri-Economy

With its long and rich heritage, abundant natural resources and intellectual capital and technical capabilities, Cork has a **major competitive advantage and distinct opportunity to position itself as a region of leading capability in the global agri-economy.**

The Cork region has the **highest amount of total used farmed land** and the **largest average farm size** of any Irish county. It is **one of the largest dairy producing counties in the country<sup>6</sup>** and integral to Ireland's positioning as **Europe's largest exporter of infant formula.** It is home to **Dairygold**, a world class dairy processing facility and Ireland's largest farmer owned cooperative which processes almost a fifth (18%) of all Irish milk and to Danone's largest baby-formula production plant which produces 80% of the base powder for Europe. **Carbery**, a major international food ingredients, flavours and cheese manufacturer is also headquartered in the region. With its **high dairy production and associated R&D technical capabilities**, Cork is **vitaly important to Government's targeted 50% milk production increases** from 2015 and **substantial infrastructural and intellectual capital investment** is taking place in recent years to ensure world-class dairy processing plants and capabilities are in place **to realise these escalating opportunities.**

With the **second longest coastline of any county**, Cork is renowned for its **quality white fish, shellfish and its growing aquaculture output.** It is **home to Ireland's only Seafood Development Centre** which has facilitated more than 350 companies in testing and trialling innovative products over a three year period with many immediate success stories. The region is also a **major producer of beef** with Kepak's Watergrasshill plant employing in excess of 600 people alone to develop meat products which serve the retail and consumer food market.

From East to West and North to South, Cork is home to an extensive and **impressive range of artisan food producers, agri-micro-enterprises and SMEs** and the ever-increasing number of tourist food trails across the county's towns, villages and coastline are testament to the scale and vibrancy of the artisan foods sector. Ballymaloe and Irish Yogurts are but a few examples of original one/two person artisan operations that successfully transformed into multi-million turnover businesses and 100+ employee operations.

There is also a major drinks presence supported by the region's high quality malt and barley produce. **Heineken** Ireland, Ireland's leading lager brewer is headquartered in the region and brews Murphys, Amstel and Coors Light in addition to Heineken and the brands they acquired from Beamish & Crawford including Fosters and Carling for the domestic market. The **Midleton Distillery & Visitors Centre** is one of the largest and most advanced distilleries in the world and home to Jameson, the best-selling Irish whiskey (95% of volume produced is exported) and the 17th largest drinks brand globally (Impact 2014) bringing in an estimated €60 million into the local economy annually through cereal purchase and payroll costs.

Significantly, Cork is home to a vibrant craft brewing industry evidenced by recent investments via Molson

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<sup>6</sup> More than a third of national milk output is produced in the South-West region.



## Cork's Agri-Opportunity: A Leading & Vital Player in Ireland's Agri-Economy

Coors purchase of the Franciscan Well micro-brewery as well as the success of Eight Degrees Brewing in Mitchelstown amongst others.



The Midleton distillery proves a prime example of the powerful synergies between tourism and food/drinks sectors attracting in excess of 110,000 visitors annually and is indicative of the major opportunity and inter-related tourism benefits associated with the development of food & drinks heritage and craft. Cork is also a flagship location for Pepsico, the world's second largest food and beverage company, which has its **Pepsico** Worldwide Flavours Head Quarters in the region and employs in excess of 500 across its three Cork locations.

The strong food, drinks and fisheries production record in the region is enabled, complemented and enhanced by **Cork's R&D capabilities** in food for health, food science and technology, food business and commercialisation and consumer research. Cork is **home to an impressive range of prolific research institutes** from **Teagasc's** world class dairy research centre in Moorepark to the extensive food research programmes at UCC, including the **Alimentary Pharmabiotic Centre** which is ranked number two in the world by Thomson and Reuters for probiotic research. **The UCC/Teagasc Strategic Alliance**, signed in 2010 further enhances the region's capacity to expand its R&D funding and its status as a world leader in the development of cutting-edge, high value consumer food products.

**University College Cork, Cork Institute of Technology and Teagasc Clonakilty Agricultural College** deliver a wide range of reputable agri-related undergraduate and postgraduate courses ranging from Level 5 qualifications in Agriculture, Horticulture, Nutritional Sciences, Food Marketing and Entrepreneurship to Level 9 qualifications in Co-operative Organisation, Seafood Innovation, Food Marketing and Rural Development and a range of PhD programmes delivered through partnership structures such as Teagasc/UCC in addition to a range of continuing professional development courses at UCC's Food Industry Training Unit (FITU).

**Even a cursory overview of Cork's agri sector illuminates the county's many accomplishments and achievements in food processing, production, R&D and technical capabilities and skills development and how exceptionally well positioned the region is to capitalise on global megatrends and Harvest 2020 targets. However and critically, in order to fully exploit and capitalise on these opportunities, it is imperative to ensure the optimal infrastructure, services, resources and capabilities are in situ so that Cork's competitive advantage is harnessed and the now existing very rich and unique opportunities are harvested for the regional and national economy.**

# Chamber Report Objectives:

## Why Agrifood & Drinks, Why Now?

As the leading business organisation in the Cork region, Cork Chamber of Commerce has a mandate to develop and promote policy recommendations that create an enabling business environment to optimise the region's economic development. As opportunities within the agri-sector have increasingly moved under the policy spotlight and **food is increasingly seen as the growth area for the future**, Cork Chamber identified the need to explore the perspectives of regional and national sectoral stakeholders<sup>7</sup> from across the agri- research, policy and industry nexus **to ensure Cork is as well positioned as possible to capitalise on its agri-opportunity**. By engaging with those stakeholders whose experience, expertise and insights can clearly determine the strengths, weaknesses, opportunities and threats within Cork's agri-sector, the Chamber - supported by its Agrifood & Drinks Working Group<sup>8</sup> - set out to identify **the very real and tangible opportunities and the associated actions required of the region to effectively capitalise on a unique period of global growth and realise "Cork's Agrifood & Drinks Opportunity"**.

A **key objective of the Chamber's research** was to **identify** whether or not those working within the sector believed there were any existing voids or vacuums across Cork's agri-sector, **where additionalities could add to and strengthen the various structures, policies, services and capabilities that are already in place at a regional level**. Accordingly, in developing this report, particular care was taken to ensure that recommendations do not duplicate or displace existing services/agencies that already provide excellent supports across the agri-landscape<sup>9</sup>. Instead, this report's recommendations identify only those voids where the introduction of additional supports and structures will further strengthen a 'joined-up', comprehensive regional framework that ensures Cork stays to the fore front by augmenting its status and capabilities in ways that drive the progression of the region's agri-opportunities.

The report identifies **five opportunity areas**<sup>10</sup> where by drawing together and strengthening relationships between the stakeholders, Cork's agri-offering, expertise, profile and product output **could be further enhanced to better ensure its firm positioning as a global leader within and across the agri-sector**. It aims to act as a blueprint that enables Cork to confidently address the challenges and deliver on the exciting opportunities that lie ahead as one of Ireland's most historic industries moves to the centre of an unprecedented, global growth stage.

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<sup>7</sup> A list of organizational participants are included in Appendix A.

<sup>8</sup> Members of the Chamber's Agrifood & Drinks Working Group are listed in Appendix B

<sup>9</sup> For example the Irish Dairy Board has a key role to play in supporting the dairy sector's preparation for the removal of EU milk quotas in 2015, Bord Bia aims to promote Irish food and horticulture domestically and internationally and provides a range of support services to facilitate this and Bord Iascaigh Mhara supports the development of the Irish Seafood Industry by providing technical expertise, business, funding and training supports.

<sup>10</sup> The five opportunity areas focus on strengthening Cork's positioning to ensure it remains at the agri-forefront through the progressive development of: R&D; skills & talent pool availability; facilitative supports for starting and growing agri-businesses; marketing strategies to make Cork synonymous with food; and collaborative approaches involving all regional agri-stakeholders to ensure quality foundations & prime conditions for long term agri-growth.



## Chamber Report Objectives: Why Agrifood & Drinks? Why Now?

To realize these opportunities will require a multifaceted approach involving key players both nationally and regionally - in addition to the engagement of international stakeholders given the export focused nature of the agri-market - to ensure the implementation of a collaborative and strategic approach that maximizes regional success. However, a strong regional partnership will ensure that Cork builds on its assets and is robust and dynamic enough to perform alongside the growing number of regions and countries that are currently scaling up efforts to accrue the benefits of a strong agri-economy.

# Capitalising on Cork's Agri-Opportunity: Five Opportunity Areas





# Opportunity 1:

## Embed Cork's Positioning as a Competitive Knowledge Economy and a Leading Global Innovator in Agri R&D

**Cork is home to a number of leading agri R&D institutes and third level institutions with global reputations in food for health, food science and technology, food business and commercialisation and consumer research including:**

- **Teagasc Food Research Centre, Moorepark**, a leading global dairy research centre specialising in pasture-based systems of milk production;
- **UCC's** School of Food & Nutritional Sciences, Department of Food Business & Development, Microbiology and Process and Chemical Engineering which encompass a wide range of research programmes from food commodities, packaging and processes to consumer research and marketing studies, to food safety and human nutrition and health - research which is highly recognised internationally in terms of measures of impact; and **The Alimentary Pharmabiotic Centre (APC), UCC**, a world expert (ranked number two in the world in probiotic research by Thomson & Reuters) on gastrointestinal health research with major successes in the area of nutraceuticals and the cross over between pharma and food<sup>11</sup>.

**The Strategic Food Alliance signed between Teagasc and UCC in 2010** formalised the extensive collaboration and synergies between the programmes at both institutions across a number of areas where activities are increasingly undertaken collaboratively, particularly in the dairy area. The Alliance forged a clear pathway of opportunity on which to build future developments for example around support for the food industry, where the combined strengths of the two organisation yields significant added value in terms of impact. In addition to its applied research to address industry relevant challenges, Cork's R&D platform is further strengthened by its **strong direct partnerships with and supports from major domestic and multinational industries** such as:

- Moorepark's recent initiatives with **dairy farms** and **leading functional food production companies**;
- The 120 strong expert multidisciplinary APC team has an excellent track record of collaborations with SMEs and MNCs including a longstanding industry partnership with **GlaxoSmithKline (GSK)**;
- UCC's partnership role [alongside UCD, NUIG, NUIM, DCU, Teagasc & UL] in Food for Health Ireland (FHI) which incorporates the marketing power of industry partners including the **Carbery Group, Dairygold, Glanbia** and **Kerry Group**;
- Strong links with SMEs and artisanal food production (e.g. support for farmhouse cheese makers and the development of bespoke programmes to support SME requirements such as UCC's Diploma in Speciality Food Production); and
- The rich resource base and excellent capabilities that its world renowned pharmaceutical cluster offers (which includes global giants such as Pfizer, MSD, Janssen and Boston Scientific) as demand for nutraceutical products intensifies.

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<sup>11</sup> The Centre's research has applications in both the pharma and functional food areas for the development of new therapies for lifelong debilitating gastrointestinal diseases such as gastroenteritis, ulcerative colitis, and Crohn's disease.



## Opportunity 1 Next Steps: Embed Cork's Positioning as a Competitive Knowledge Economy and a Leading Global Innovator in Agri R&D

### Next Steps:

With expert capability across key areas where global mega-trends predict substantial increased demand, there is a compelling opportunity for Cork to build on its already strong R&D capabilities and industry/HEI R&D partnerships by:

- Growing research, innovation and product development in the high demand nutraceutical market. With its well established world class pharmaceutical cluster and its significant agri-strengths, there is a major opportunity to **capitalise on the cross industry opportunities [across food and pharma]** that the existing infrastructure, intellectual capital and industry base provides by prioritising nutraceutical innovation and product development. This is an especially **timely opportunity that could attract substantial investment** and resultant employment gains as drug patents expire and pharmaceutical companies seek to expand into new markets.
- Given the significant activity in key areas of commodity and local-industry-oriented research in UCC and Teagasc, there is a significant opportunity to develop **a food/beverage technology cluster** that involves all of the relevant players using **research funding in Moorepark and UCC to drive specific research programs**. This cluster could support and drive strategic actions that better enable the region to capitalise on its capabilities across key opportunity areas - such as functional foods, nutraceuticals, local-industry-oriented research - through the provision of expert supports across R&D, financing, training and product development/commercialisation.
- Identifying strategies to proactively incentivise **'scale ups' and commercialisation opportunities from Cork's significant agri-research and innovation portfolio**. By developing a specialist agri commercial mentoring hub, where key expertise is pooled and dynamically tailored to assist those with the potential to scale on a case per case basis according to need (e.g. from marketing and commercialisation, to business and soft skills development), existing growth inhibitors could be removed and enablers created for more companies to progress to the market-commercialisation space. Collectively, elements of this initiative would have significant potential to increase regional revenues and employment. For instance, UCC could contribute significant expertise to the development of efficient low-cost manufacturing systems through better process control, minimising quality variability and supply chain management.

## Opportunity 2:

Skills Development & Talent Pool Availability:  
Ensure Cork's positioning as a prime region and leading provider of cutting-edge agri-skills.

The **internationalisation agenda** and the requirement for **world-class talent availability** is a **leading determinant of a region's status within any global industry** and fundamental to a region's capacity to attract research and industry investment. As **home to highly reputable Higher Education Institutions (HEIs), research institutes and cutting edge domestic and multinational industries**, the Cork region has an extensive infrastructure in place to train and attract the world class talent required by leading industry and R&D investors including:

- **UCC, CIT and Teagasc Clonakilty Agricultural College** which deliver an **extensive range of reputable agri-related undergraduate and postgraduate courses** ranging from Level 5 plus qualifications in Horticulture, Nutritional Sciences, Food Marketing and Entrepreneurship and International Development to Level 9 qualifications in Food Science, Food Business, Co-operative Organisation, Food Marketing and Rural Development and a range of PhD programmes delivered through Teagasc and UCC to facilitate first class postgraduate research activity<sup>12</sup>.
- **UCC's Food Industry Training Unit** also offers a range of diploma and **Continuing Professional Development (CPD) courses** across a range of agri-related areas such as Food Science & Technology; Seafood Innovation; Speciality Food Production, Business Management; Manufacturing Management; and Corporate Direction (Food Business).
- The commitment of the region's higher education institutions to implementing timely courses in **co-operation with industry and national expert agencies** to ensure the optimum talent availability as the agri-sector's talent requirements expand and evolve. The UCC/Bord Iascaigh Mhara Diploma in Seafood Innovation, Teagasc Clonakilty Agricultural College's level 7 Diploma in Dairy Farm management and the forthcoming first ever national post graduate diploma in meat management developed by UCC and Kepak are prime examples of the region's capability to respond to evolving labour market and investment requirements.



<sup>12</sup> A diagram of the National Qualification Frameworks, from Level 1 through 10 is included in Appendix C.

## Opportunity 2 Next Steps: Ensure Cork's positioning as a prime region and leading provider of cutting-edge agri-skills.

### Next Steps:

As competing regions and countries scale up efforts to improve their ranking and profile in intellectual capital and talent pool availability, Cork must continue to invest, adapt and evolve to ensure it retains and augments its competitive advantage in this area. Key recommendations to ensure Cork's continued success in this domain include:

- The **establishment of a formal skills-development cluster of influencers comprised of key HEI representatives (teaching and R&D), industry stakeholders and agribusinesses** to collaboratively **develop a results-driven strategic framework** which ensures Cork's education/training sector stays to the forefront in delivering on the evolving needs of industry. Such a partnership-focused structure supports a proactive and dynamic approach to skills development which better ensures the prompt availability of industry required talent through timely, expedient, formalised structures that specifically target and 'stay on top' of shifting demands.
- To further strengthen Cork's status as a responsive and adaptive industry hub that guarantees the supply of high-demand world class talent, partnership-focused strategies that ensure the delivery of **tailored work placements and bespoke programmes** in speciality food & drinks and other areas as required by industry should be prioritised within the regional skills framework and delivered in association with the region's third level institutions and industries.
- As the internationalisation agenda becomes ever-more salient, there is a mutual opportunity for **UCC and industry to collaboratively 'sell' the region's R&D and skills development expertise across global markets through shared PR and marketing campaigns**. Co-ordinated, collaborative campaigns between HEIs and industry - in domestic and global markets - that deliver a consistent and shared message on skills/talent within the region would reinforce Cork's status as a global leader and coordinated agrihub, increase the market reach of campaigns and augment the region's capacity to attract the best quality applicants and graduates in addition to further incentivise research and MNC investment [see also opportunity 5 on marketing].
- Promotional campaigns **could also include the promotion of placement opportunities for overseas students into local businesses** to facilitate cross-border knowledge transfers and provide regional stakeholders with **valuable insights on how to succeed in overseas markets** where rapid economic development is allied to global growth in food demand e.g. China, Brazil, India.

## Opportunity 3:

### Growing Start-Ups to Scale: Positioning Cork as the Optimum Environment for Starting & Growing Agri-Businesses

Cork's **reputation as an entrepreneurial hub** is reflective of the region's capacity to act on innovation and **develop start-ups capable of real scale** and its accomplishments in the agri-sector are no exception to this. The growth in the number of **artisan food producers, local food markets and tourist food trails** are **testament to the scope and scale of food production that typifies the Cork region** and with artisan success stories such as **Ballymaloe Relish, Irish Yogurts, Glenilen and Clonakilty Black Pudding and the recent growth in the craft brewing industry**, the capacity to scale and infiltrate international markets are endless.

The financial, advisory and training development supports of bodies such as Enterprise Ireland and Bord Bia, the collaborative partnerships between bodies such as Supervalu, Bord Bia and Musgraves which deliver unique and much sought after programmes such as the Food Academy<sup>13</sup>, Government's substantial agri-food research grants and Cork County Council's provision of subsidised incubation kitchens across the county to address the often prohibitive start-up costs for food businesses are but a few examples of the range of supports that have been developed. These have been pivotal in incentivising entrepreneurship and innovation. However, with a significant proportion of all Irish food production companies located in the Cork region<sup>14</sup>, there is further scope to incentivise larger numbers to grow to scale by ensuring access to a continuum of supports that foster and incentivise early stage start-ups in growing to scale. The extensive continuum of supports required ranges from on-site processing facilities to enable Cork's seafood sector maximise added value for its high-demand, quality products, to innovative regional financial mechanisms that respond to the equity gap that currently prohibits scale-ups for many companies and appropriately targeted network structures and mentoring supports to assist early-stage food and drinks companies to grow.



<sup>13</sup> The Food Academy Programme is supported by Bord Bia and Supervalu and delivered via the Enterprise Boards/Local Enterprise Offices. The Programme aims to support producers in developing their product from the concept/start-up phase through to national and international brand via a series of workshops on: consumer needs, product quality & driving sales; logistics, brand development & commercial knowledge; and management, promotional strategies and own brand opportunities.

<sup>14</sup> Of the 965 food production companies registered on the Bord Bia CRM database as of February 2014, 161 (17%) were located in the Cork region.

## Opportunity 3 Next Steps: Ensuring the Optimum Environment for Starting & Growing Agri-Businesses

### Next Steps:

To ensure Cork's positioning as the optimum environment for starting and growing agri-businesses and to position it as a business and commercial development leader of tangible impact across the agri-sector, the following supports could be implemented:

- The establishment of a formalised **cluster of national and international experts from agri-businesses, HEIs and government agencies/bodies** [e.g. Enterprise Ireland, LEOs, Bord Bia International] and commercial bodies [banking sector/financial institutions] to **inform the design and implementation of a framework that makes Cork a world class eco hub across all phases of the agri-business development process** from idea inception to post production commercialisation and international market expansion. A **framework that delivers a continuum of bespoke supports** based on the diverse requirements of entrepreneurs/micro-enterprises and SMEs at different stages of the business development life cycle has a major capacity to remove barriers and foster growth and provide **important economic and employment gains** whilst simultaneously **copper-fastening the region's agri-profile and reputation as an innovative business development eco-system**.
- While acknowledging the range of supports that have been developed at national and regional level to support agri-businesses, this research identified a clear opportunity to further encourage Cork-based agri-businesses participation in existing programmes by providing a user-friendly framework that enables them to better navigate and avail of existing supports. In addition to designing a framework that enables Cork to better leverage the statutory and regional supports that are already in place, the framework should also simultaneously identify areas where additional supports, tailored to local business needs are also required.
- Drawing on the concept of co-opetition, the Framework could **establish a formal linkage programme between the larger and micro-enterprises** to **facilitate cross-learning and foster opportunities** for small companies to grow. Such a linkage programme that is based on enabling mentoring supports would assist the region **in augmenting its successes in product development and commercialisation** whilst simultaneously growing the region's profile as an innovative, collaborative and partnership-focused leader. Examples such as the collaboration between Supervalu, Bord Bia and the Enterprise Boards to deliver the Food Academy Programme, which aims to support suppliers as they journey from concept to start-up phase to national and international brand and Dairygold, Carbery's, Glanbia and the Kerry Group's work in supporting local producers in bringing their products to international audiences are prime examples of how collaboration between young entrepreneurs and start-ups and established companies can support enterprise development and growth.



## Opportunity 3: Ensuring the Optimum Environment for Starting & Growing Agri-Business

### Next Steps:

- The development of a **partnered mentoring programme between UCC, CIT and Teagasc for entrepreneurs and micro-enterprises modelled on UCC and CIT's very successful IGNITE and Rubicon Centres but with a specific agri-focus** would enable the region to further capitalise on its successes and expertise across the agrifood & drinks and entrepreneurship domains. This could incorporate the expansion of supports such as those currently offered by Teagasc through its Food Innovation Hub and pilot plant supports for start-up companies in the food ingredients/dairy sector. Such a programme across the range of agri-sectors would greatly **assist early stage entrepreneurs in developing their product in a commercially viable way** and better enable the region to capitalise on its capabilities in stimulating and nurturing the development of new businesses.
- **Cork Innovates<sup>15</sup> and Energy Cork<sup>16</sup> successfully demonstrate Cork's capabilities in developing co-ordinated network structures that facilitate and incentivise entrepreneurship and innovation.** The agri-business development framework could also incorporate a **facilitative networking support element** that **combines the region's agri-strengths and expertise** through a range of time-relevant and context fitting events - for example a Moorepark hosted SME food event, partnered with Enterprise Ireland and the Seafood Development Centre which taps into the Teagasc national SME programmes could provide direct counsel and opportunities for those within the sector to access the necessary infrastructure to grow business ideas.
- Key to enabling scale ups and to capitalising on market opportunities for growth is accessibility to essential infrastructure. Ensuring the agrifood & drinks sector is structured in a manner that supports the scale up of the processing aspect of the industry is accordingly vital. Three key opportunities in this regard include:
  - Enhanced supports at the early incubation stage through the incorporation of collaborative supports with bodies such as UCC and Teagasc to augment the supports offered via the County Council's provision of subsidised incubation kitchens for artisan food producers;
  - The development of 'on-point' processing facilities to maximise added value prior to the exportation of agri-products. For instance, the limited availability of processing facilities was

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<sup>15</sup> Cork innovates is the platform for the Cork Entrepreneurship Steering Group, established in November 2011 and drawing its membership from the leading regional business support agencies, educational institutions and local authorities. Additionally a number of Cork's entrepreneurs have committed their time, business expertise, entrepreneurial experiences and insights to helping develop the initiative. Cork innovates works to bring together the various parties which educate, inform and foster Cork entrepreneurs and Cork business. Its aim is to support those who are engaged with the Cork entrepreneurial and business community through connecting, communicating, collaborating and celebrating the success stories.

<sup>16</sup> Energy Cork is an industry-driven cluster pursuing coordinated actions to strengthen enterprise and employment within the energy sector in the Cork region. Supported by Cork City Council and Cork County Council through their respective Economic Development Funds, Energy Cork was conceived by Cork Chamber with a view to building on the unique opportunities for the region to secure competitive advantage in the energy sector.

## Opportunity 3: Ensuring the Optimum Environment for Starting & Growing Agri-Business

identified as a major inhibitor for Cork's seafood sector which constrains its ability to maximise profits for its high-demand, quality product; and

- The introduction of a regional financial mechanism to address the equity gap that currently acts as a major inhibitor to scaling up. Bank funding is not enough to make this happen. For instance, German companies have succeeded in expanding as a result of strategic decisions to bring in professional management and equity funds to build up scale. The establishment of an investment/equity fund - supported by government, large co-ops and stakeholders to invest in Cork regional companies with a capacity to scale - should form an integral part of the agri-business development framework. This should be implemented alongside the aforementioned training/education/mentoring supports to address the early stage funding support requirements of companies.

→ As competing regions seek to develop agri-business hubs, Cork is comparatively well placed to **capitalise on its food history and culture** and further grow the region's agri-business development opportunities through **the establishment of a designated Commercial Food & Drinks Centre to support early stage start-ups that simultaneously grows the region's agri-profile. By structuring such a Centre around food research and development, education and training and encapsulating an innovative and diverse range of offerings** from a food court and new market stall spaces for artisan producers, to a cookery school and chef/producer demonstration spaces, **Cork could copper-fasten its status as the Food Capital of Ireland** whilst providing **simultaneous supports and facilities for entrepreneurs, micro-enterprises and SMEs. The region's current exploration of the location of such a centre next to the City's renowned English Market** provides an excellent opportunity for Cork to demonstrate leadership and innovation whilst simultaneously exploiting the synergies between food/drinks and consumer/tourism revenues in ways that proactively incentivise higher footfall numbers and the overall vibrancy and vitality of the city centre (see Opportunity 4 for more on food & tourism marketing).

# Opportunity 4:

## Telling Cork's Agri-Story: Implement a Co-ordinated Regional Marketing Strategy, Making Cork Synonymous with Agrifood & Drinks

Regional branding strategies co-ordinated around key cluster areas of strength such as 'Silicon Valley'<sup>17</sup> for ICT and the Netherlands 'Food Valley'<sup>18</sup> initiative **illuminate the capacity of strategic marketing campaigns to generate and attract substantial investment and revenue streams and firmly position a region on a global map.** Investment and revenue opportunities range from those related to domestic and international investment in food production facilities, R&D and innovation to the significant tourism traffic gains associated with the development and promotion of Cork's food and drinks heritage and craft.

The scale of Cork's agricultural land and coastline and the quality of the derived product from both, its long dairy heritage, sophisticated R&D base, successes in the delivery of high-end functional food products and emerging capacities in nutraceuticals and its niche artisan products and tourist-friendly food hubs from Kinsale to the English Market all illuminate the innate opportunity for Cork to become an agri-sector equivalent to California's 'Silicon Valley'. **Telling the Story of Cork** and highlighting its strengths, successes and progressive strategies is **key to the region's capacity to optimise, enhance and further grow its accomplishments in the sector.** The key components of this marketing campaign should then be integrated into all wider regional branding strategies such as the ongoing strategic messaging development work of the Cork Regional Strategic Messaging Group<sup>19</sup>. A failure to effectively market and promote Cork's myriad products and successes across the agri-spectrum makes the region vulnerable to being superseded by alternative regions despite the above par offering of Cork's agri-hub.



<sup>17</sup> **Silicon Valley** refers to the South Bay portion of the San Francisco Bay Area in Northern California. It is home to many of the world's largest technology corporations, as well as thousands of small startups. The term originally referred to the region's large number of silicon chip innovators and manufacturers, but eventually came to refer to all high-tech businesses in the area, and is now generally used as a metonym for the American high-technology sector. Despite the development of other high-tech economic centers throughout the United States and the world, Silicon Valley continues to be a leading hub for high-tech innovation and development, accounting for one-third of all of the venture capital investment in the United States

<sup>18</sup> **Food Valley** with the city of Wageningen at its centre is a region in the Netherlands where international food companies, research institutes, and Wageningen University and Research Centre are concentrated. **The Food Valley** area is the home of a large number of food multinationals and within the Food Valley about 15,000 professionals are active in food related sciences and technological development. Far more are involved in the manufacturing of food products. Food Valley is intended to form a dynamic heart of knowledge for the international food industry. Through the Food Valley Organisation, there is a commitment to create conditions so that food manufacturers and knowledge institutes can work together in developing new and innovating food concepts. The Food Valley Organisation has joined the Food Innovation Network Europe.

<sup>19</sup> The Cork Regional Strategic Messaging Group is comprised of Cork City and County Council, Cork Chamber, UCC, CIT, the Port of Cork and Cork Airport, Failte Ireland and SWRA. The Group is currently exploring the development of a strategic messaging campaign to promote the Cork region nationally and internationally.

## Opportunity 4 Next Steps: Telling Cork's Agri-Story: Implement a Co-ordinated Regional Marketing Strategy, Making Cork Synonymous with Agrifood & Drinks

### Next Steps:

Cork has many 'agri-stories to tell'. Sharing the stories and successes of the region - through a cohesive, 'joined-up' branding campaign that illuminates Cork's agri-strengths and capabilities in a way that mirrors the successes of key international branding campaigns on regional strengths (e.g. Netherlands Food Valley and Silicon Valley) is vital to grow commercial awareness and augment the scale and type of investments that the region is capable of securing. Key strategies to realise this potential include:

- The establishment of a formal cluster comprised of leading representatives from across the agri-sector (e.g. R&D, industry, agri-businesses), supported by marketing specialists to develop a strategic cross-sectoral strategy that brands Cork as the country's premier food hub. The strategy should have an ambitious vision for agri-growth at its core and **illuminate Cork's unique identifiers** in a way that benefits all strands of the spectrum equally (e.g. fishing, dairy, distilleries, breweries, R&D, industry) so it can be adopted and used by all stakeholders as part of their marketing/promotional and business development plans. This is vital to ensure Cork is consistently pitched in a manner that sells its strengths and capabilities and successfully attracts further investment and growth opportunities. The Cork agri-marketing strategy could be modelled on - Bord Bia's origin green brand but could focus on business to consumer as well as business to business relations.
- Cataloguing all that is happening across the dairy, fisheries, meat and drinks sectors, across R&D and product development in UCC, CIT, local authorities, artisan food sectors and across other relevant agencies within this space and telling the Story of Cork. Highlighting its successes and raising the profile of **its achievements, entrepreneurial accomplishments and wider regional strengths** would cement Cork's 'role model' status through and provide a solid platform to enable the region to further optimise, enhance and grow its accomplishments in the sector.
- Illuminating the networked structures and supports within the region through regional branding displays of local buyer/seller relationships could further augment the regional partnerships and collaborations across the agri-economy and add an extra component to the marketing campaign. For instance in Holland, farmers display branding signs acknowledging where they are producing for (e.g. 'we are brewing for Heineken' signs are displayed by barley producers) which heighten the sense of co-operative relationships, emphasise the local element and raise the visibility of agri-activity across regions.
- The success of Cork City's English Market is emblematic of the intertwined commercial and tourism benefits and diverse revenue streams that Cork's food and drinks heritage can deliver. To fully capitalise on the intertwined benefits that a strong food & drinks heritage and craft can deliver for the tourism market, the agri-branding cluster, should collaborate with the tourism sector to ensure Cork's myriad food offerings are integrated into and foremost in all regional tourism experience packages and PR thus further promoting and strengthening the sector's profile and enticing and attracting a growth in regional tourism numbers.

## Opportunity 5:

### A United Focus: Ensuring Quality Foundations & Prime Conditions for Long-Term Economic Growth

A quality infrastructural framework that is built on robust and enabling foundations is essential to enable expansion and growth for existing agri-businesses and to ensuring the region's competitive edge in the longer term. While R&D, technical capability, natural resources and quality skills supply are integral ingredients to a successful agri-economy, so too is a cost-competitive, accessible and enabling business environment.

With a Tier-1 Port of national significance, an international airport connecting to 50 plus destinations and a regional strategic road network that has secured considerable investment in recent decades, Cork has many advantages that support and enable significant business activity across the agri-spectrum. However, as cross border competition for investment continues to increase, Cork must commit to building on its existing strengths by ensuring prime conditions provide it with a competitive edge that further augment its growth opportunities. Priority areas consistently highlighted during stakeholder consultations included:

- Agreement on a 'joined-up' transport policy that improves the region's accessibility given the high mobility demands associated with the agri-sector;
- Improved cost-competitiveness, particularly in terms of sustainable and efficient energy solutions; and
- The implementation of strategies that ensure the continuous availability of essential raw materials to protect the integrity of the Irish food brand.





## Opportunity 5 Next Steps:

### Realising the Opportunity: An Outstanding Business Environment, The Key Enabler to Long-Term Economic Growth

## Next Steps:

There are a number of unique and strategic opportunities which have the capacity to ensure that Cork is prime-positioned as a cost-competitive, enabling and facilitative location in which to locate, expand and grow agribusinesses including:

- The development of a **Green and Clean Cork energy brand**. By aligning with and reinforcing *Harvest 2020*'s 'think green' message, Cork could firmly position itself as a **'green and clean' agri-region** drawing on expertise in UCC and Moorepark to drive this initiative in collaboration with industry. Energy Cork could also play a central role in facilitating and enabling this. A Cork green initiative, trialled locally with capacity for wider replication, would be a **tangible attraction for agri-clients and FDI companies and support new start-ups in promoting their product offering by placing the region on a par with leading energy countries**. The willingness of industry partners to input into waste to energy initiatives was consistently highlighted during the Chamber's consultation process and is testament to the **demand at local level for more effective solutions that address the waste challenge in a more cost effective and sustainable way**. Action of this nature is essential to address the existing risks where Irish regions currently 'lose out' as many scale up companies relocate to international locations with more attractive energy and labour costs and could place Cork to the forefront in developing dynamic solutions to retain business and employment within Ireland.
- In addition to identifying strategies which address water sourcing and water charges, the establishment of a **'regional co-operative structure'** based on the principles of 'co-opetition' or a 'buyer/retailer' purchasing power group could support a more sustainable and affordable supply of raw materials for high demand Irish products (e.g. year-round fruit, onions, flour and vinegar) in cost sustainable ways that directly support local producers and the artisan foods sector.
- To properly grow and exploit Cork's agrifood & drinks opportunity, a **co-ordinated, 'joined-up' transport strategy on the priority infrastructure requirements**, agreed by all the stakeholders, who could then collectively deliver advocacy strategies to ensure **continuous improvements to the physical infrastructure**. Key infrastructure support requirements identified during consultations centred on:
  - Logistics and distribution operations to the UK and beyond which are vital to contain the negative impact that high transport costs have on the sector's potential.
  - An upgrade to the M20 is increasingly imperative as the abolition of the CAP approaches to ensure the efficient transport of goods along the Atlantic Corridor.
  - Continuous improvements to the Port of Cork [including the associated road infrastructure of the N28 and N40] and expanded air-connectivity ex Cork Airport.

# Conclusion & Next Steps

**By developing co-ordinated structures and action-focused partnerships, led by those with greatest expertise across the five opportunity areas, Cork has the capacity to ensure it is uniquely placed to further capitalise on the very real and tangible opportunities for growth in this unique but compelling period of agri food and drinks history.**

Cork already has a proven track record in driving developments across global growth areas that align with its regional strengths, through the collaborative models of Energy Cork, IT@Cork and Cork Innovates. The region is now charged to push ahead and secure advantage in this area for Ireland and the region whilst simultaneously implementing a model that has the capacity for national replication in this and other growth areas relevant to regions across Ireland.

To ensure optimum implementation and impact, a co-ordinated, overarching body comprised of stakeholders from across the relevant sectors is key. This overarching body should then support and be supported by five specialist sub-groups comprised of relevant experts from across each of the five opportunity areas who are best placed to guide and facilitate the implementation of specific actions. The incorporation of a range of stakeholders from small scale businesses and artisan producers through to larger MNCs and state agencies and commercial bodies across the spectrum of areas identified under the five opportunity areas enables an integrated approach to realise regional opportunities and ensures that the expertise, experience and insights from are represented and incorporated across all stages of the process.

Fundamentally, this requires joined-up actions and a shared commitment from the stakeholders involved to further enhance its capacities across the five opportunity areas, but the rewards - in terms of enhanced capabilities, employment and economic revenues - both justify and necessitate strategic action and investment of this nature to generate these very real and valuable returns.



# Appendix A

## Consultation Participants

- Ballymaloe Country Relish
- Bord Bia
- Bord Iascaigh Mhara
- Teagasc Clonakilty Agricultural College
- Cork City Council
- Cork County Council
- Cork Enterprise Boards
- Cork Institute of Technology
- Dairygold
- Delicious
- Enterprise-Ireland
- Heineken
- Irish Farmers Association
- Irish Farmers Journal
- Irish Distillers, Pernod Ricard (Jameson)
- Kepak
- Musgraves
- Teagasc
- Ulster Bank
- University College Cork

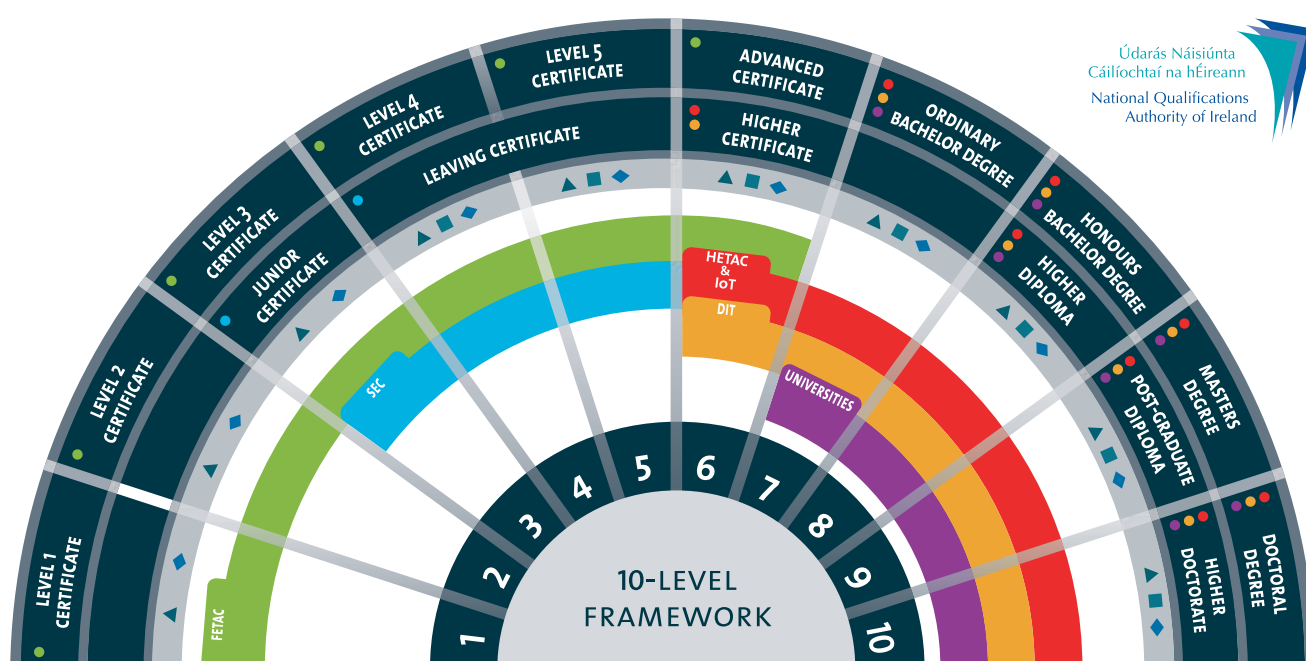
# Appendix B

## Cork Chamber Agri Working Group

- Mr. Conall Mc Aonghusa (Chair)
- Mr. Dan Mc Sweeney, Carberry Group
- Ms. Rose McHugh, Merrion Stockbrokers
- Mr. Frank O'Mahony, Frank O'Mahony Business Consultants & Former MD Pepsi-Ireland
- Mr. Conor Healy, Cork Chamber
- Dr. Siobhán Bradley, Cork Chamber
- Ms. Alma Murnane, Cork Chamber

# Appendix C

## NATIONAL FRAMEWORK OF QUALIFICATIONS



### AWARDING BODIES

- FETAC - Further Education and Training Awards Council
- SEC - State Examinations Commission (Department of Education & Science)
- HETAC - Higher Education and Training Awards Council
- IoT - Institutes of Technology (make their own awards at specified levels under Delegated Authority from HETAC)
- DIT - Dublin Institute of Technology
- Universities

### AWARDS IN THE FRAMEWORK

There are four types of award in the National Framework of Qualifications:

- Major Awards: are the principal class of awards made at a level
- ▲ Minor Awards: are for partial completion of the outcomes for a Major Award
- Supplemental Awards: are for learning that is additional to a Major Award
- ◆ Special Purpose Awards: are for relatively narrow or purpose-specific achievement







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