

Fresh Chipping Potato Project 2020-2022

- ▶ Potato Development Group
 - Lorcan Bourke - Bord Bia
 - 22/11/2022

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Fresh Chipping Potatoes - Import Substitution Project

- Aims of the project:

Import substitution
(70,000 tonnes imported)

Support existing growers to supply more product into
the Irish market

Examine supply chain models and promotional
opportunities to market their potatoes/chips



Potato Development Group ~ Chipping Potato Project



Marketing & Promotion

- Research
- Video Production
- Q Mark
- National Potato Day

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Department of
**Agriculture,
Food and the Marine**
An Roinn
**Talmhaíochta,
Bia agus Mara**

Commercial
Potato
Projects



Advisory/KT/Research

- KT meetings
- In-field agronomy
- Storage advice
- International best practice
- Oak Park research



IFA



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Historical Background – Chipping Potatoes

- Very focused on GB market availability and price
- Irish growers more focused on the fresh ware market (e.g. Rooster into retail)
- Low Irish supply volume to this market
- “Dual purpose” varieties in the past ~ Markies becoming the market norm
- Few specialised growers – room for more in line with market demand
- British chipping potatoes held a ‘reputational advantage’ in the market
- Storage capacity and type of store – storage is key; not enough, not specialised for chipping potatoes

Fresh Chipping Project - Approach



- Potato Development Group / HIF ; Import Substitution Opportunities focus
- Ongoing discussions with 'Stakeholders' to take the project forward
- Parallel Market Research/Development & Technical KT Dimensions
- Teagasc KT sessions
- Bord Bia Market Research –
 - Consumer Market Research On-Line Survey
 - Independent Chip Shop Owner / Managers - Face to Face interviews
- Bord Bia promotion: trade promotional video / local brands / Q Mark / NPD

Fresh Chipping Potato Project 2019-2022

- Project Focus

- Ireland grows c.350,000 tonnes of potatoes
- Ireland imports c.70,000 tonnes (~ €34m) of fresh/chilled potatoes – not all for chipping
- 43,000 tonnes (~ €18m) imported from GB
- IRL imports mainly specific varieties of fresh chipping potatoes i.e. Markies, Maris Piper
- Project is NOT concerned with frozen chips
- Focus is on the supply of fresh chipping potatoes to the independent chipping trade
- Focus is on increasing market share of Irish grown chipping potatoes and develop an Irish supply chain
- Brexit supply chain 'shake-up' potentially presents some new supply chain opportunities – paper trail
- Transport cost increases and sustainability issues also offer 'Irish grown' commercial opportunities
- **Bord Bia market research identified a real marketing opportunity for the promotion of use of locally grown potatoes in Irish chippers**

Irish Grown Chipping Potatoes Consumer and Trade Research

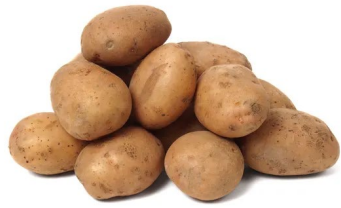
Siobhán Collins

Insight and Branding Specialist

The Thinking House, Bord Bia

National Potato Conference

Nov 22nd 2022



Size of Import Substitution Opportunity

Ireland imports €34m (70,000 tonnes) of fresh / chilled potatoes per year

€18m (43,000 tonnes) come from UK & NI

British growers have perfected the growing and storing of chipping potatoes

There are 600 – 800 chip shops in Ireland

How do we realise this opportunity?

Start with
UNDERSTANDING!

➤ *CONSUMER*

➤ *CHIP SHOPS*

Objectives of Consumer Research

“Understand consumer knowledge and perceptions of the current sourcing of potatoes in Irish chips shops and their attitudes towards potentially using Irish grown potatoes.”

Consumer Research



- A nationally representative online survey amongst 1,000 adults aged 18+.

- Quotas were placed on the number of interviews achieved in each demographic grouping (age, gender, region and social class) to ensure it matched the Irish population.



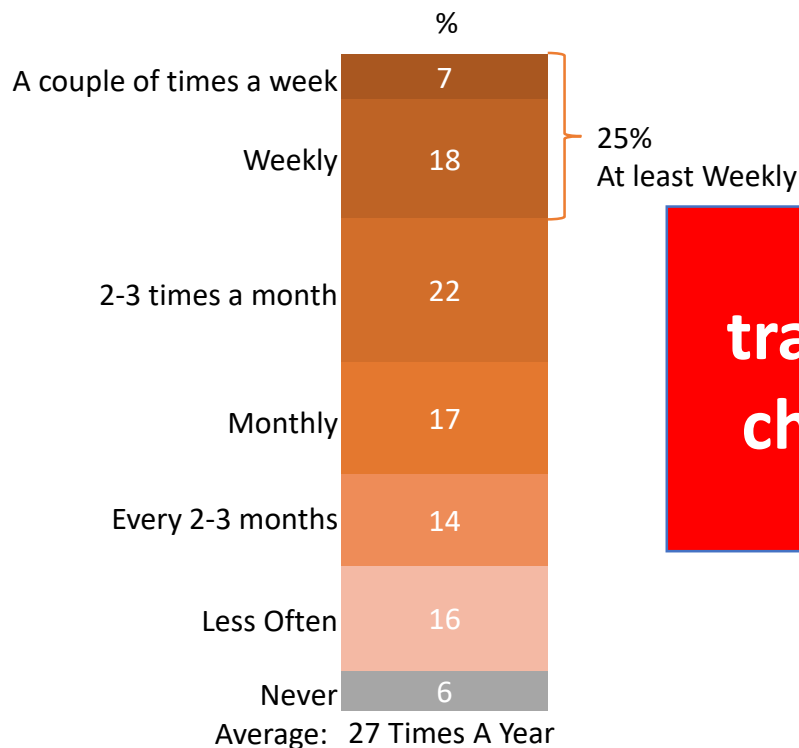
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Main Findings

Frequency of Buying Chips from Traditional Chippers



Base: All adults aged 18+ - 1,000



**1 in 4 Irish adults go
traditional chippers to buy
chips at least on a weekly
basis.**



Q.1



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Frequency of Buying Chips from Traditional Chippers

X Demographics



Base: All adults aged 18+ - 1,000

	Total	Gender		Generation				Social Class	
		Male	Female	Gen Z	Millennials	Gen X	Baby Boomers	ABC1	C2DE
Ever buy chips from a chipper	94%	95%	93%	96%	97%	98%	88%	93%	95%
Buy chips from a chipper at least weekly	25%	29%	21%	28%	37%	28%	11%	21%	27%

Millennials and males are most likely to buy chipper chips on a weekly basis while Baby Boomers are the least likely



Q.1



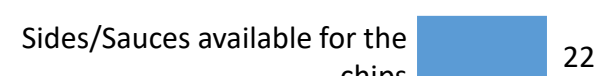
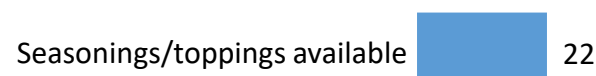
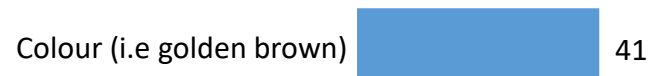
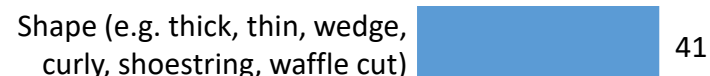
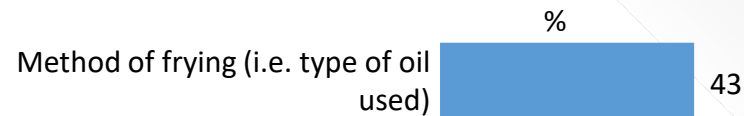
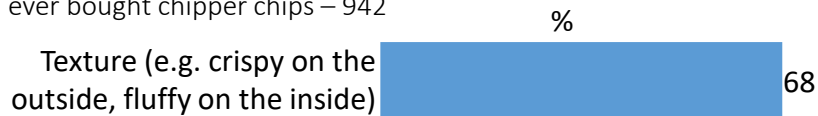
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Important Factors in Making Great Chipper Chips



Base: All those who have ever bought chipper chips – 942



Q.2 Thinking about what makes up great chips from chip shops, what factors are most important?

Texture is considered the most important factor that make great chips. 6 in 10 rely on the reputation of chippers and over half judge by appearance.

Q.2



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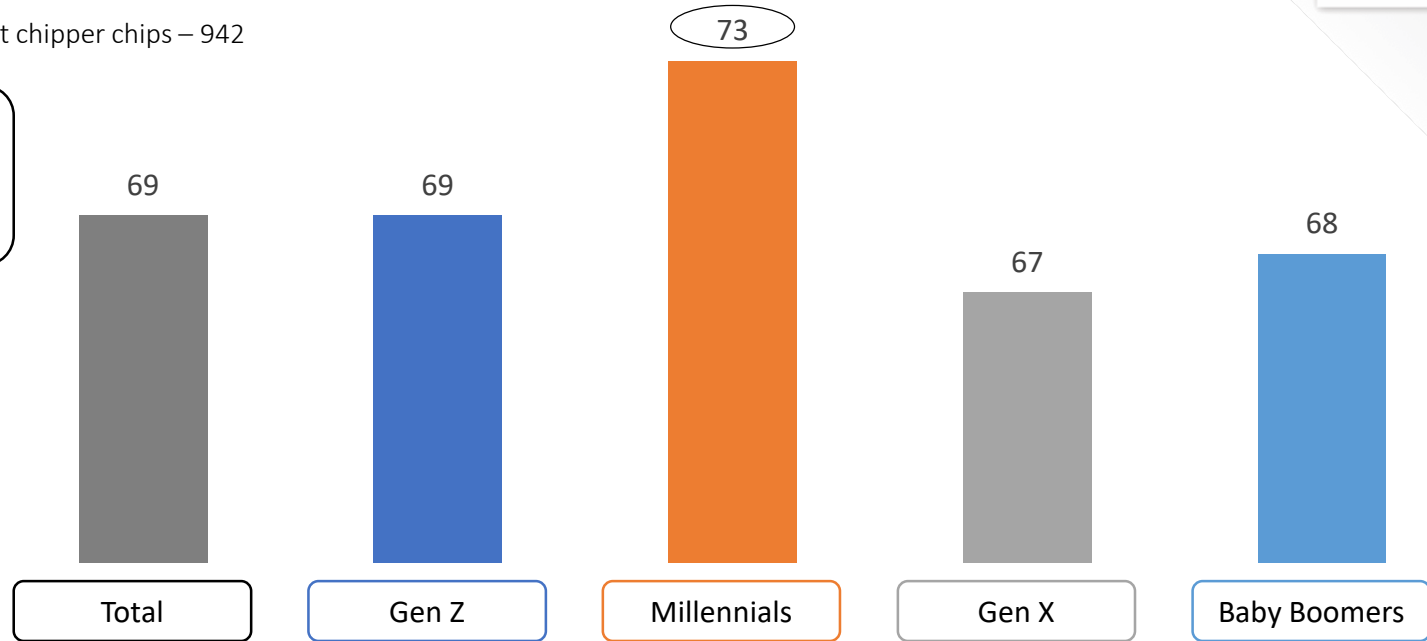
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Importance of Where Potatoes are Grown in Influencing the Quality of Chipper Chips X Age

Base: All those who have ever bought chipper chips – 942

Q.3 How important is where the potatoes are grown in influencing the quality of chips from a chip shop?



Millennials are most likely to consider where the potatoes are grown as important in influencing the quality of chipper chips.

Q.3



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Perceptions of Where the Majority of Potatoes Used in Irish Chipper Chips Come From



Base: All those who have ever bought chipper chips – 942

Republic of Ireland



66%

69% Amongst Weekly
Visitors to Chippers

Britain



10%

Spain



4%

Northern Ireland



2%

France



2%

Q.4 Where do you think
the majority of potatoes
used in Irish Chippers
come from?

**2 in 3 think that the majority of potatoes used in Irish
chippers come from Ireland.
Only 1 in 10 correctly identified Britain as the source for
the majority of the potatoes that are used in Irish
chippers.**

Q.4



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Reaction to Finding Out that the Majority of Chipper Chips are Grown in Britain



Base: All those who have ever bought chipper chips – 942

Weekly+ Buyers of Chipper Chips

Base: 246
%

Very surprised by
this statement (4)

20

Somewhat
surprised by this
statement (3)

33

I am not
surprised by this
statement (2)

17

I am not at all
surprised by this
statement (1)

30

53%

47%

Mean Score

2.4

Q.5 The majority of chippers/chip shops use potatoes grown in Britain to make their chips. *Please select the answer that best represents your reaction to this statement.*



Almost 3 in 5 find it surprising that the majority of chipper chips are grown in Britain.

Q.5



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Likelihood to Take Action...



Base: All those who have ever bought chipper chips – 942

Q.6 How likely would you be to actively choose chips made from Irish grown potatoes versus those made from UK grown potatoes in chip shops, if all other factors (e.g. price, quality, taste etc.) are equal?

Likelihood to choose chips made from Irish grown potatoes versus those made from UK grown potatoes in chip shops.

%1/2
Unlikely

10

%3
Neither/Nor

33

%4/5
Likely

57

Q.7 How likely would you be to support a chip shop that sources locally grown potatoes to make their chips?

Likelihood to support a chip shop that sources locally grown potatoes to make their chips

5

21

74

Q.8 How likely would you be to pay more for chips made with locally grown potatoes?

Likelihood to pay more for chips made with locally grown potatoes

27

31

42

**Circa 3 in 5 are likely to choose chips made from Irish grown potatoes
Approximately 3 in 4 are likely to support a chip shop that sources locally
More than 2 in 5 are willing to pay more for chips made with locally grown potatoes.**

Q.6/7/8



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Likelihood to Pay More for Chips Made with Locally Grown Potatoes

Base: All those who have ever bought chipper chips – 942

Q.8 How likely would you be to pay more for chips made with locally grown potatoes?

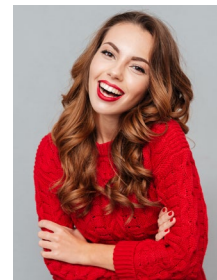


Least Likely

- ✓ Male – 33%
- ✓ Rest of Leinster – 35%
- ✓ Gen Z – 36%



Likelihood to Pay More for Chips Made With Locally Grown Potatoes



Most Likely

- ✓ Female – 47%
- ✓ Munster – 50%
- ✓ Millennials – 47%

Males (33%) and those living in the Rest of Leinster (35%) are the least likely to pay more for chips made with locally grown potatoes.

While Females (47%) and those living in Munster (50%) are most likely to pay more.

Q.8



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Amount Willing to Pay for Chips Made with Locally Grown Potatoes

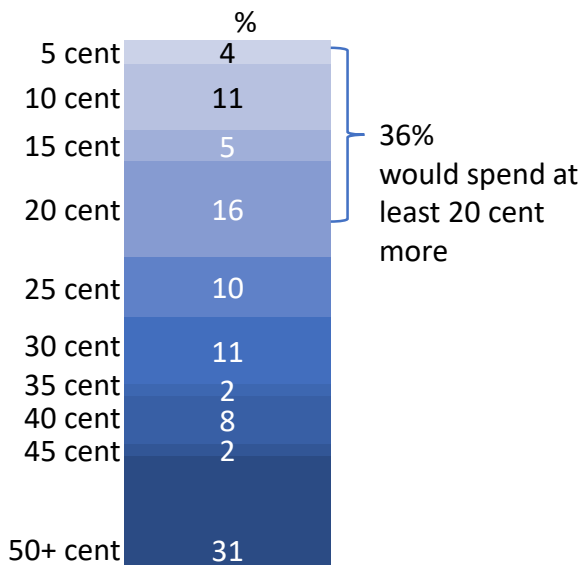


Base: All those who are willing to pay more - 397

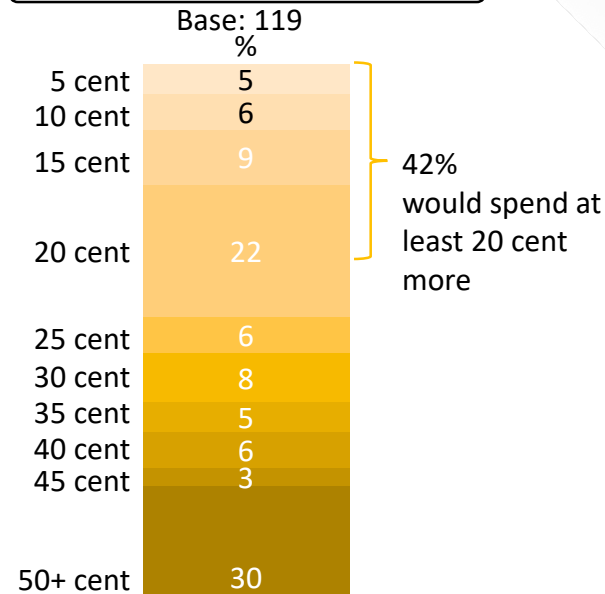
Q.9 How much more per bag of chips would you be willing to pay for chips made with locally grown potatoes?



Total Ever Bought



Weekly+ Buyers of Chipper Chips



Amongst those who are willing to pay more for chips made with locally grown potatoes, on average, they are willing to pay an extra 34 cent per bag of chips.

Q.9



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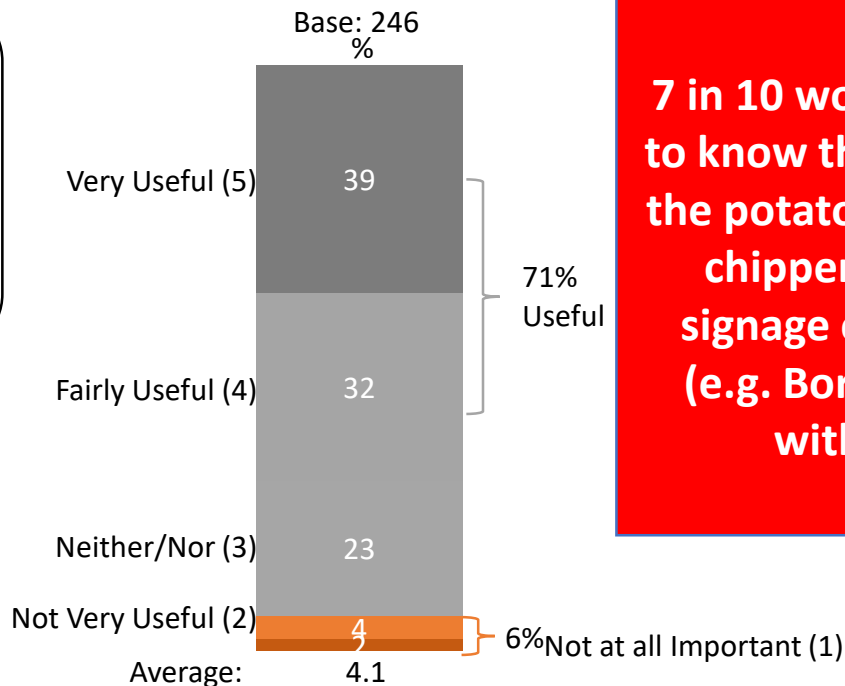
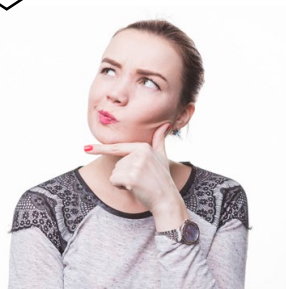
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Usefulness of Country of Origin Signage Within Chipper

Base: All those who have ever bought chipper chips – 942

Weekly+ Buyers of Chipper Chips

Q.10 How useful would it be for you to know the country of origin of the potatoes used in your usual chipper indicated through signage or recognised marks (e.g. Bord Bia Quality Mark) within the chipper – maybe on posters or window stickers or something similar?



7 in 10 would consider it useful to know the country of origin of the potatoes used in their usual chipper indicated through signage or recognised marks (e.g. Bord Bia Quality Mark) within the chipper.

Q.10



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Key Insights

Key Insights



1. Males and Millennials go to the chipper to buy chips most often.



2. Texture, reputation of chipper and the appearance of chips are the most important factors that make up great chipper chips.



3. Majority consider where potatoes are grown as important in influencing the quality of chipper chips.

4. Evident lack of awareness of where the majority of potatoes used to make chipper chips come from.



5. Majority claim to be likely to choose chips made from Irish grown potatoes and support chippers that source locally grown potatoes.



6. More than 2 in 5 willing to pay more for chips made with locally grown potatoes - on average, willing to spend 34c extra per bag of chips.



7. Majority would consider it useful to know the country of origin of the potatoes used in their usual chipper indicated through signage or recognised marks within the chipper



Chipper Chips

Chip Shop Research



Research Objectives

- **Understand general outlook of fish & chip shop owners and managers**
- **Understand their requirements re potatoes for chips**
- **Attitudes to switching to Irish grown potatoes**

Who we spoke to

Mick, Di Lucia's,
Marino, Dublin

Nunzio Delduce, Ferrari Take Away,
Ringsend, Dublin

Romeo Talossi, Wimpy,
Fermoy

Paul Foley, Murphy's Take Away,
Blackpool, Cork

Zac Crawford, KCs Chip Shop,
Douglas Village, Cork

Kenneth Kearney,
O'Reilly's Fish & Chips,
Glanmire, Cork



Fresh Chips



- At the heart of the traditional chipper is a well-established back-room work procedure
- Made on the premises, fresh, from scratch, 'home made'

all made by ourselves

*old-fashioned - genuinely fresh fish,
never frozen, fresh potatoes, prepared
every day*

*Italian chip shop is famous for
everything is hand-made*

- Revolves around potatoes

Chipper Chips



*we do the best chips .. I use fresh
chips .. every morning into the
peeling machine
if buy cut - it's different, not
that fresh
I prefer to cut in the
morning, not the night
before*



25 kg bags of fresh potatoes, stored
in a store room or storage area

emptied into a peeler machine, with
an inner peeling plate like
sandpaper



peel, container to wash, slice
machine, then into water to keep
fresh

The Good, the Bad & the Ugly





The Perfect Potato?

- ☑ 'Chipping potato'
- ☑ Cook without browning
- ☑ Low sugar (moisture/starch)
- ☑ Easy to clean & peel
- ☑ No 'eyes', veins
- ☑ Right size
- ☑ Consistent, fresh
- ☑ Where from, how stored

Varieties Mentioned

1	Markies, Maris Piper, Spanish New Season
2	Maris Piper
3	Golden Wonder, Maris Piper, Spanish, Cyprus
4	Maris Piper or Markie
5	ex-Maris Pipers, now Markies
6	Markies
7	Spanish
8	Maris Piper, Markies
9	Maris Piper, Markie
10	don't know, whatever's in season
11	Maris Piper, Cyprus and Spain
12	Markies, Spanish

The Potatoes

English potatoes all year, except Spanish in June-July

- Consistent specification with virtually no deviation:

- Varieties: Maris Piper or Markies

*Pipers are good .. perfect, no eyes - a clean spud .. very low in sugar .. Maris Piper ..
potatoey flavour ...Markies less flavour but cleaner*

- English potatoes all year, except for short period in the summer when use potatoes from Spain

*any potatoes from England stay white .. English more consistent, less work involved
..English: how clean they are, low sugar, flavour*

- Varying knowledge and curiosity about English potatoes

English potatoes - on scene 10-15 years .. mainly come from London, England

It is about methodology and the Brits got it right

*English potatoes are cultivated in the south of England - not so rainy - Ireland
cannot deliver this kind of potato*



The Potatoes 2

- For a 4-6 week period June-mid-July during the summer use Spanish new *because English gone*
no waste off Spanish .., don't need so much washing
the Spanish potatoes are Markie - but less waste from cleaning
- And one or two mention Poland and Germany





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Irish Potatoes

Barriers to Switching

If it's not broken why fix it?

British chipping potatoes perform well

Risky for chip shop to switch

And some bad historical experiences



Conclusions

Would welcome Irish potatoes, if fulfil 'chipper' chip function, consistently

Would like to source
Irish grown potatoes

But need reassurance around:

- Specification of chipping potato
- Will perform in fry colour and texture
- Is consistent in quality



Thank You

delivery not a problem

more quantity, more than a month or two

Bord Bia should encourage farmers to plant more .. less emphasis on beef ad campaign - yes

same quality

standard size

no eyes

not too much sugar

consistent

minimum 6 months supply

public relations

incentive for farmers

a steady price

The Marketing Opportunity

- Irish consumers and chip shop managers wide open to using Irish potatoes ~ of equal quality and performance in fryer
- Chipping potato varieties can be grown successfully in Ireland ~ with less food miles
- To evolve a more long term sustainable supply chain model
- Support growers and chip shop groups seeking to market their chips as 'locally grown food' endorsed by local branding / POS and Bord Bia Q Mark

Vision for the project

VISION: Irish growers to build-up local supply chains based around establishing a reputation for the consistent supply of 'high quality product' endorsed by their own local branding and supported by the Bord Bia Quality Mark on bag and at point of sale

Vision relies on;

1. **Excellent Cooking and Eating Quality every time ~ agronomy and storage knowledge**
2. **Working through displacing imports from established markets (displacing real imports in real markets i.e. no speculative growing)**
3. **Running local promotions at POS: appeal to 'local food' and Bord Bia Q Mark trust**

Fresh Chipping Potato Project Steps

- Use of the video with 'chip shop trade' - as proof that Irish growers can grow equal quality chipping potatoes that perform just well as imports
- Bord Bia criteria for inclusion on a supplier listing; www.bordbia.ie/sourcechips
 - Bord Bia quality assurance
 - Irish / local brand identity, visible on bag
 - Full traceability; grower name clearly identified on each bag
- **Aim:** to promote the opportunity and nurture partnership relationships between growers / chipping potato buyers

Branding in the Chipping Trade – building a reputation for Irish grown chipping potatoes

