Food Industry Road Map 2030

Food sector profile

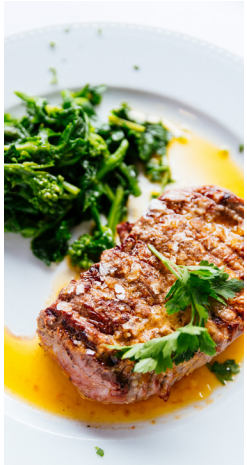
The Irish food sector makes a significant contribution to employment, output and national incomes. In 2024 the agri-food sector accounted 5.4% of modified gross national income (GNI*) while agri-food exports accounted for over 8.6% of all merchandise exports. The industry generates considerable economic activity beyond direct employment such as transport, logistics, and retail, while also yielding strong value-added output relative to input costs. Output value is expected to rise in 2025 due to price increases across most sectors.

The Irish food sector is dominated by dairy and meat production, which together account for over 60% of Irish food output and export value. Approximately 90% of Irish food is exported to over 180 countries around the world. Global demand continues to be strong for safe, high-quality, and traceable food and beverage products and food ingredients from Ireland. In 2024 total food and drink exports (including live animals) were valued at approximately €19 billion and were almost evenly exported to the European Union (32%), Great Britain (38%) and Other International Markets (30%). Export values have risen to €19 billion in 2025 (Bord Bia).

Ireland has strived to add value to its food production and exports and in this regard there has been a steady increase in the export value of prepared consumer foods and drinks in recent years. The processing sector has invested and upgraded its systems and facilities substantially in recent years. This investment has led to improved efficiencies in processing as well as increased utilisation of by-products and improved sustainability credentials.

The global food industry is undergoing transformative changes driven by changing consumer preferences including increasing demands for improved sustainability as well as technological advancements. There is also a rising demand for healthier food options, transparency in food sourcing and “clean label” products. Robotics and AI will have a substantial impact on the future food industry, as will changing trade policies, stricter food safety standards, and growing regulatory frameworks on sustainability.

The Irish food sector must respond to global market developments while also maintaining the highest microbiological and chemical food safety standards. There will be opportunities in the development of alternative dietary protein sources, co-product valorisation and the fermentation and biotransformation of new products and ingredients.



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Export values for agri-food categories 2020 to 2024 (€ billions)

Dairy

2020	5.1
2021	5.1
2022	6.0
2023	6.3
2024	6.5

Meat and Livestock

2020	3.4
2021	3.5
2022	4.0
2023	4.2
2024	5.5

Prepared Consumer Foods (PCF)

2020	2.5
2021	2.5
2022	3.0
2023	3.1
2024	3.6

Drinks

2020	1.6
2021	1.6
2022	2.0
2023	1.8
2024	2.1

Horticulture and Cereals

2020	0.2
2021	0.3
2022	0.3
2023	0.3
2024	0.3

Seafood

2020	0.5
2021	0.5
2022	0.5
2023	0.6
2024	0.6

The details below set out the components within the 2024 data
Dairy includes butter (26%), cheese (21%), fat filled milk powder (13%), specialised nutritional powder (13%), casein (8%), skim milk powder (6%), whey (4%), milk and cream (3%), other (6%)
Meat and Livestock includes beef (68%), pigs (12%), sheep (9%), poultry (3%), live exports (8%)
Prepared Consumer Foods incls. value added meat (26%), meals (20%), confectionary (14%), bakery (11%), beverages (9%), cereal based (5%), other (15%)
Drink includes whiskey (49%), liqueurs (18%), beer (15%), cider (4%), gin (1%), wine (1%), other (11%)
Horticulture and Cereals includes mushrooms (48%), cereals (27%), fruit and nuts (10%), amenity hort. (7%), potatoes (4%), other veg (4%)
Seafood includes shellfish (31%), pelagic (24%) value added (18%), freshwater (17%), whitefish (8%), other (2%)

The Teagasc Food Research Programme, supporting the food sector

The Teagasc Food Programme focuses on science-based innovations and technical solutions for the Irish food industry. Its foundation is based around sustainably produced, nutritious, safe food with appealing sensory properties targeted at both local and export markets. In future the programme will enhance sustainability through improved integration with biotransformation and digitalisation.

The programme has strong linkages with food companies, universities, and other public bodies to ensure its relevance to industry which it engages with and supports directly through key infrastructures including the National Food Innovation Hub, Moorepark Technology Ltd. (MTL), the National Prepared Consumer Food Centre, the Bia Innovator Campus, the National Brewing and Distilling Centre and the Food Biotest Facility.

Food sector challenges and responses supported by Teagasc

Social

People
While automation continues to be developed and adopted, the sector still requires a supply of skilled people. The Teagasc Food Programme in addition to providing bespoke training to industry, also trains the next generation of talented researchers and leaders for the Irish food industry.

Food Safety and Human Health
Food safety and human health are ongoing challenges for the industry, particularly due to our high level of exports and ambition to service high value markets. Teagasc offers significant support to the sector in addressing these critical areas.

Technology
Food producers must consider strategic adoption of digital technologies (Sensors, AI, automation, including robotics etc.) to enhance production systems and optimise process flows. Teagasc supports the automation of the food industry and has developed pilot scale systems for the integration of advanced sensors, data analytics and the industrial internet of things to inform on processing parameters and optimise energy usage across a range of processing unit operations.

Engaging with citizens
Informing the public, the industry and the scientific community on the "truth" around food production and nutrition has become increasingly challenging. Teagasc plays a role in providing scientific fact based knowledge and information on many aspects of food and nutrition.

Food sector challenges and responses supported by Teagasc continued...

Economic

Market Outlook
The medium term outlook for the Irish Food & Drink sector remains generally positive, with industry optimistic and ambitious. Teagasc continues to enhance the resilience, sustainability, and global competitiveness of Ireland's agri-food industry, ensuring a thriving future for all stakeholders in the food supply chain.

Balanced rural development and the emerging bio-economy
The food processing sector is very important to rural regions of Ireland where preparation and processing of new foods and by-products can provide a diversification opportunity for existing producers as well as new entrants for food and non-food use. Teagasc programmes focus on supporting sustainable production systems for current and emerging products and by-products. The Food Programme has developed a dedicated bioprocess innovation suite for advanced research in biotransformation /fermentation (bioconversion) which integrates with process technology for the development of new products / ingredients /processes for industry through valorisation of co-product waste streams. This will support Ireland's ambitions as set out in the National Bioeconomy Action Plan.

Enterprise Integration - Diversification
The dairy and animal processing industry has potential capability and technology that can be adapted to extracting and processing high value plant based products - particularly when seasonal production volumes create operational capacity in production sites. The Food Programme leads two large projects on the development of plant based foods and feeds; U-Protein (DAFM funded) and VALPRO Path (Horizon Europe funded).

Improving competitiveness through technical development
The industry continues to benefit from advances in technologies, with the application of DNA sequencing to advance food safety and food health. The Food Programme's Sequencing Centre has expanded its food and health agenda, food safety and microbiome and genomic analysis capabilities. Sequencing technologies are being applied in farm and factory settings for microbiome identification which provides an understanding of the ecological relationship between food matrices and sources of food contamination. These capabilities are also made accessible to SMEs and startups, supporting food safety and innovation across enterprise types.

Food sector challenges and responses supported by Teagasc continued...

Environment

Carbon and water efficiency
The industry is challenged to reduce its carbon footprint and improve its water use efficiency. Teagasc supports the industry to develop processes that utilise energy and water more efficiently as well as extract and recycle useful nutrients and components.

Chemical reduction
The industry is seeking to optimise the use of chemicals during cleaning in all aspects of food production and processing to minimise residues while retaining high food safety standards. Teagasc works closely with industry to understand the entry, partition and fate of disinfection by-products in the food process, with chlorine based sanitisers and chlorate a recent example in the dairy sector.

Sustainable packaging and shelf life
Industry needs to reduce packaging and waste around food processing while ensuring maximum shelf life at the highest food safety standards. Teagasc programmes support the development of new sustainable packaging systems and products.

Dehydration for export
Dried dairy exports generate €3 billion, annually. Teagasc supports this sector through research that maximises efficiency while safeguarding quality and customer experience, optimising spray-drying infrastructure and investigating innovative alternative processes to ensure long-term competitiveness.

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The road map for food is available on **www.teagasc.ie**